



South Ribble Borough Council

Retail and Leisure Study

Final Report

September 2017



Contents

1.0 Introduction 1
2.0 Current Retail and Office Trends 3
3.0 Planning Policy Context 11
4.0 Original Market Research 20
5.0 Health Check Assessments 44
6.0 Population and Expenditure 63
7.0 Retail Capacity in South Ribble Borough 73
8.0 Commercial Leisure Needs 85
9.0 Key Findings and Policy Recommendations 97
Glossary of Terms 101

Appendices

- Appendix 1 – Study Area Plan
Appendix 2 – NEMS Household Survey Results
Appendix 3 – NEMS In-Street Survey Results
Appendix 4 – Health Check Assessments
Appendix 5 – Quantitative Retail Capacity Assessment

1.0 Introduction

Instruction

- 1.01 WYG Planning (hereafter referred to as 'WYG') was commissioned by South Ribble Borough Council ('the Council') in August 2016 to undertake a Retail and Leisure Study for the Borough. The Council's previous evidence base in respect of retail and leisure needs was provided by the Central Lancashire Retail and Leisure Review, which was undertaken on behalf of the joint authorities of Preston, South Ribble and Chorley in 2010. Given the time which has elapsed since the Central Lancashire Retail and Leisure Review reported it is considered appropriate to undertake an entirely new Study.
- 1.02 The key purposes of the Study are identified by the Quotation for Retail Consultancy, which was issued by the Council in June 2016. The four principal matters to be addressed by the Study are:
- to understand the shopping behaviour of local residents living within and adjacent to South Ribble to identify convenience and comparison goods and expenditure patterns;
 - to undertake a health check assessment of the principal centres within South Ribble, including the Capitol Centre retail park;
 - to assess the future quantitative capacity and qualitative need for new retail floorspace across the Local Plan period through to 2030; and
 - to provide strategic advice on the overall future 'retail need' in the Borough in the context of Central Lancashire.
- 1.03 In order to address the above requirements, the Study draws on new empirical research, with NEMS Market Research Limited ('NEMS') undertaking a survey of 1,000 households within the defined Study Area in October 2016. The Study Area for the household survey comprises eight zones which are based on postcode sectors grouped together to reflect areas which are likely to exhibit similar patterns of shopping behaviour. The Study also draws on the most recent Experian population and expenditure data (published November 2016) in order to establish the most up-to-date position with regard to both convenience and comparison goods capacity.

Structure of Report

1.04 Our report is structured as follows:

- Section 2 provides a context for the Study through the analysis of key retail and leisure trends;
- Section 3 considers local and national planning policy of relevance to retail and town centre matters;
- Section 4 provides a review of the results of the household survey undertaken by NEMS Market Research in October 2016;
- Section 5 considers the vitality and viability of the Borough's town and district centres;
- Section 6 identifies current and future population and expenditure levels within the defined Study Area;
- Section 7 provides our assessment of the future quantitative and qualitative need for further convenience and comparison goods retail floorspace;
- Section 8 considers the need for additional commercial leisure development; and
- Section 9 sets out our key conclusions and provides our recommendations in respect of South Ribble's future retail strategy.

2.0 Current Retail and Office Trends

Introduction

- 2.01 The retail property landscape across the UK has evolved significantly over the past 50 years, from post-war redevelopment in town centres, through to the emergence of retail warehouse parks and out-of-town regional shopping malls. For most of this period, the retail sector has experienced considerable expenditure growth, which has been attributed to a number of factors, including greater disposable income, availability of credit, new technology and a general overall increase in our standard of living. However, recent economic conditions have had a clear impact on expenditure, and per capita convenience goods spending has actually reduced in recent years. The way in which goods are purchased has also altered due to the increased popularity of 'e-tailing', which now claims more than one in every ten pounds spent in the UK.
- 2.02 In order to set out the wider context for the Study, we provide an overview of prevailing retail and leisure trends below.

Polarisation and the Decline of Secondary Centres

- 2.03 In recent years, shoppers have been increasingly prepared to travel in order to access a greater choice of shops and the type of leisure facilities which are more commonly available in larger towns and cities. As a consequence, larger retail venues (with a regional or sub-regional role) have tended to perform relatively strongly, but a number of smaller towns (particularly those proximate to larger centres) have fared less well. The performance of many smaller towns has also been particularly impacted upon by the recession and the growth of internet shopping, which has resulted in many operators believing that they can achieve appropriate nationwide coverage with a smaller number of stores.
- 2.04 Colliers¹ reports that many retailers are focused on a much smaller portfolio of stores to cover main markets and to complement online sales. As such, Colliers indicates that new and emerging retailers frequently target no more than 50 stores in key locations and, as a consequence, this trend is having an impact on take-up levels in shopping centres.
- 2.05 It is also evident that certain operators – including the Arcadia Group, through its Outfit format which incorporates Topshop, Topman, Miss Selfridge and others – are sometimes

¹ Midsummer Retail Report 2014, Colliers, July 2014

prepared to close stores in smaller centres in favour of representation on a retail park. We also note the increasing preference of fast food operators to incorporate 'drive thru' restaurants, which has resulted in the closure of 'in centre' McDonald's restaurants in some centres. Furthermore, in November 2016, Marks & Spencer announced its intention to close up to 30 stores and relocate or downsize a number of others. The changes will result in clothing being sold in a lesser number of Marks & Spencer stores.

- 2.06 Such changes can result in particularly significant impacts at smaller town centres, which have tend to be the subject of higher vacancy rates, and which have also often suffered related reductions in rental levels and footfall in recent years. As a consequence, a greater proportion of comparison goods expenditure is being claimed by a smaller number of centres of sub-regional or regional importance.
- 2.07 However, such changes have also brought forward opportunities for different types of retailer. Some available units in smaller centres have been re-occupied by household discounters such as B&M Bargains, Poundland, Poundstretcher and Wilkinson. Whilst such lettings are valuable in bringing back premises into active use, many smaller centres are heavily reliant on such retailers, which are generally operated at the lower end of the market.
- 2.08 It is also evident that some centres are seeking to 'reinvent' themselves through an increased focus on quality independent and food and drink operators. Towns are also increasingly valuing their market as a means to differentiate themselves from retail parks and superstores, and many markets are looking to contemporary and speciality retailers to create interest and draw customers in. The greatest opportunities for successful vintage, craft and food and drink markets have so far been in centres served by affluent catchments.

The End of the 'Big Four' Space Race and the Rise of the Discounter

- 2.09 Shoppers have turned away from food superstores in recent year and Mintel² suggests that this decline is such that it cannot be considered a 'blip'. Mintel attributes the problems which face superstores to two principal factors.
- 2.10 Firstly, many young people are choosing to rent within or close to town and city centres. As a consequence, many undertake sporadic food shopping and often eat out, use takeaways, or buy instant meals. Accordingly, when young people undertake food shopping, they often have no greater need than that which can be serviced by a convenience store.

² 'UK Retail Rankings', Mintel, April 2016

South Ribble Retail and Leisure Study

- 2.11 The second factor is the growth of discount operators, which have become more mainstream in respect of both their offer and their market positioning. Mintel suggests that the improvements in discounters' offer – such as wider ranges, better fresh foods and more premium foods – means that they have become an attractive alternative to both large food superstores and to convenience stores.
- 2.12 As a consequence, the 'big four' foodstore operators (Asda, Morrisons, Sainsbury's and Tesco) have become circumspect in respect of new store openings and, indeed, have closed a number of existing stores. All four have suffered significant declines in their market share over the past four or five years. As Table 2.1 below indicates, Tesco has suffered a 2.1 percentage point reduction in its share of the food retail market between 2011 and 2016, and Morrisons has suffered a 1.8 percentage point reduction in market share. Considered together, the market share of the 'big four' foodstore operators has declined from 58.5% in 2011 to 52.7% in 2016 (a reduction of 5.8 percentage points). In contrast, other retailers – most notably Aldi and Lidl – have benefitted from increases in their market share. Aldi's market share increased from 1.9% to 5.3% (equating to an increase of 3.4 percentage points) between 2011 and 2016.

Table 2.1: Market Share of Key UK Food Retailers

Operator	2011	2012	2013	2014	2015	2016
Tesco	23.7%	23.9%	23.0%	22.5%	22.0%	21.6%
Sainsbury's	12.8%	13.1%	12.9%	12.8%	12.2%	11.9%
Asda	12.5%	13.3%	13.0%	13.0%	12.0%	11.5%
Morrisons	9.5%	9.3%	8.9%	8.2%	7.9%	7.7%
Aldi	1.9%	2.6%	3.3%	4.2%	4.8%	5.3%
Co-operative Food	5.5%	5.4%	5.1%	4.9%	4.8%	4.7%
Waitrose	3.5%	3.6%	3.7%	3.9%	3.9%	3.9%
Marks & Spencer	3.6%	3.7%	3.7%	3.8%	3.9%	3.9%
Lidl	1.9%	2.0%	2.0%	2.2%	2.4%	2.7%
Iceland	1.8%	1.9%	1.9%	1.9%	1.8%	1.8%

Source: UK Food & Grocery Retailer Update, Verdict, October 2016

- 2.13 The most notable expansion strategy pursued by any of the 'big four' operators in recent years relates to Sainsbury's decision to enter the discount market through a partnership with Netto. Netto announced the trialling of 15 stores in November 2014 clustered around the M62 corridor between Liverpool and Hull in order to 'test the water'. The first two new build openings were announced in March 2015 in Lymm and Hull, which appeared to suggest

confidence in the venture. However, following the trial, Netto announced in July 2016 that it would close all its UK stores by August 2016.

- 2.14 For the most part, the current strategy of the 'big four' operators involves the reconfiguration and refurbishment of existing stores. In some cases, product lines are being reduced and pricing is being made straightforward. Some operators are looking to introduce other uses to take existing floorspace and Sainsbury's acquisition of the Home Retail Group in September 2016 allows it to introduce Argos (which it now owns) into its stores. Small concessions of Habitat are also currently being tested within five branches of Sainsbury's.
- 2.15 Aldi and Lidl have both sought to take advantage of the structural changes in the food retail market and have announced ambitious store opening targets that will further increase pressure on the 'big four' operators. Aldi has identified major expansion plans and intends to open 80 new UK stores in 2016³, bringing its total number of stores to around 700. Over the longer term, it intends to trade from 1,000 UK stores by 2022⁴. Aldi's plans include three formats: standard stores of between 18,000 sq.ft and 20,000 sq.ft with a minimum of 70 parking spaces; the 'Small Aldi' format of between 10,000 sq.ft and 14,000 sq.ft with a minimum of 40 parking spaces; and, the 'City Aldi' format of between 7,000 sq.ft to 10,000 sq.ft with no parking spaces required. Aldi is understood to be considering all types of property, including development sites, mixed-use schemes, retail parks, high streets, shopping centres and roadside.
- 2.16 Lidl plans to expand to trade from a portfolio of 1,200 UK stores in the coming years⁵. Lidl's future requirements reportedly⁶ comprise units of between 20,000 sq.ft and 30,000 sq.ft, with sites of 1.5 acres required for standalone units and up to 4 acres for mixed-use schemes.

Special Forms of Trading

- 2.17 Many consumers who previously shopped in town centres and at retail parks are now increasingly using the internet to make purchases. Experian⁷ identifies that 'special forms of trading' (which includes internet, mail order and market sales) now comprises an estimated 14.9% of total UK retail sales at 2016, which compares to a market share of just 5.5% at 2006. Experian estimates that the value of non-store sales in the UK at 2016 is £57.4 billion.

³ Article headlined 'Aldi to roll out 80 new UK stores in 2016', Retail Week, 17 February 2016

⁴ Article headlined 'Supermarkets: discounters race for space', Property Week, 2 November 2016

⁵ 'UK Food & Grocery Retailer Update', Verdict, October 2016

⁶ Article headlined 'Supermarkets: discounters race for space', Property Week, 2 November 2016

⁷ 'Experian Retail Planner Briefing Note 14', November 2016

It estimates that special forms of trading will increase further to account for 18.2% of retail expenditure at 2021. Thereafter, it is anticipated that additional growth will be relatively limited, with special forms of trading claiming 20.9% of UK retail expenditure at 2035 (the last reporting year for which Experian provides a figure).

- 2.18 The growth in internet as a sales medium has been enabled by the increase in access to the internet by UK households, which the Office for National Statistics⁸ reports increased from 57% of households at 2006 to 89% in 2016. The proportion of households with access to the internet is expected to increase further over the coming years and the popularity of shopping online is also assisted by mobile phones and tablets with faster 4G network technology. The Office for National Statistics indicates that the proportion of adults accessing the internet using a mobile phone increased by nearly double – from 36% to 66% – between 2011 and 2015.
- 2.19 It is evident that improvements in technology and an increased confidence in the security of online payments have supported substantial increases in internet sales in recent years. In addition, the option of using the internet to 'click and collect' in-store at a dedicated counter is also increasing in popularity, with the service now accounting for over 50% of John Lewis internet orders⁹. Some retailers are also seeing benefits arising from the use of shops as 'showrooms' where shoppers can view and try goods before making purchases later in their home. More progressive retailers are also providing in-store Wi-Fi (which can be used to inform shoppers of promotions via their mobile phones) and technology points (which can allow shoppers to browse a wider product range than that carried in store). Accordingly, whilst new technology and the rise of internet shopping undoubtedly provides challenges for traditional 'bricks and mortar' retailers, it also brings with it some opportunities.
- 2.20 In addition, it is important to note that many purchases made online are actually sourced from the shelves of 'bricks and mortar' stores and thereby have the potential to support retail floorspace. This is acknowledged by Experian which now provides adjusted market share figures for special forms of trading¹⁰ in order to reflect purchases which are effected through stores. The adjusted allowance for special forms of trading equates to 3.2% for convenience goods at 2017, increasing to 3.6% at 2019, to 4.1% at 2022, to 4.4% at 2024, to 4.9% at 2029, and to 5.2% at 2034. For comparison goods, the adjusted allowance is 13.2% at 2016, increasing to 15.6% at 2021, to 16.1% at 2026, to 16.3% at 2031, and to 16.5% at 2035.

⁸ 'Statistical Bulletin: Internet Access Households and Individuals', Office for National Statistics, August 2016

⁹ 'Click and Collect', Mintel, September 2014

¹⁰ 'Experian Retail Planner Briefing Note 14', November 2016

The adjustment is greater for convenience goods, reflecting the fact that most online food purchases are taken from the shelves of actual stores.

Leisure and the Appetite for Additional Food and Drink

- 2.21 In recent years, town centres have also increasingly relied upon an expanding food and drink sector to bring some vacant units back into active use. Eating out has become increasingly popular and both national multiples and independents have benefitted from the additional expenditure which has resulted. Colliers¹¹ refers to Barclaycard data which identifies that spending in restaurants in the first quarter of 2015 was up 17% year-on-year.
- 2.22 Food operators increasingly require units which are in amongst the retail heart of a centre, rather than taking space within a food court. As a consequence, modern shopping mall developments tend to mix food operators within the wider offer and upwards of a quarter of units can be occupied by cafes and restaurants. Food and drink operators (particularly national multiples) can be particularly attractive to landlords as long leases can often be agreed to due to the cost of fit-outs.
- 2.23 Colliers¹² also reports that cinema openings are on the up and that niche cinema operators, such as Everyman, Curzon and The Light, are considered to have the potential to be particularly complementary to shopping environments. Such cinemas have more modest land take requirements than large multiplexes, and therefore may have a greater chance of being incorporated in a mixed-use development.
- 2.24 The health and fitness sector has been buoyed by the popularity of budget gyms. Operators such as Pure Gym, the Gym Group and easyGym have an operational model which is based on low costs and high volume. Such gyms tend to have plenty of equipment in order to encourage uses, but are characterised by basic fit-outs and limited staff. Many budget gym operators – including Pure Gym and the Gym Group – are actively seeking to bring forward additional facilities, with a wide range of properties (including old theatres, larger shop units and office space) having the potential to meet their needs. The Leisure Database Company¹³ suggests that there were around 300 budget gyms across the country in summer 2016, but that this figure has the potential to increase to around 1,000 in the near future.

¹¹ 'Midsummer Retail Report 2015', Colliers International, July 2015

¹² Ibid

¹³ As reported in the article headlined 'Why budget gyms could be set to take over the sector', Sports Insight, 11 June 2016

South Ribble Retail and Leisure Study

2.25 There are a number of emerging leisure concepts which are also helping to anchor retail environments, including bowling alleys, trampolining and crazy golf. These concepts can assist centres in providing a point of difference with the competition, ensure that visitors' dwell times are increased, and assist a town's evening economy.

Brexit

2.26 The referendum in June 2016 on the UK's membership of the European Union resulted in a majority vote to leave the EU. The terms of withdrawal are to be negotiated with the Commission within two years of formal notification by the Government. A number of commentators have forecast that uncertainty during this time will negatively impact upon consumer confidence and expenditure, and that investor decisions may be put on hold.

2.27 Whilst it would appear that the short term impact of 'Brexit' on the retail and leisure sector have perhaps been more modest than some analysts suggested, Verdict published an Economic & Retail Update in September 2016¹⁴ in order to highlight potential future issues. Its Update provides the following forecasts.

- Retail growth across Britain in 2016 is expected to be flat and growth in the clothing and footwear sector as a whole is likely to be disappointing. However, the weaker pound means that international travellers may spend more, with international brands and premium goods being particularly attractive.
- A weaker pound will also lead to higher import and manufacturing costs, which retailers will pass onto consumers. Verdict anticipates that the food and clothing and footwear sectors will see the greatest inflationary rises.
- Brexit may have a negative impact on the housing market and a consequential adverse impact on those retailers who rely on householders investing in their property. Accordingly, there may be less spending on goods such as furniture, floor coverings, DIY and gardening goods and so on.
- In volume terms, Verdict expects little change to the food retail sector, but notes that inflationary pressures might mean that shoppers spend more on their groceries and therefore have less to spend on other goods.

2.28 It is therefore evident that Brexit has the potential to impact on future expenditure growth (and also on population growth). As such, there will be a need to monitor the impacts arising

¹⁴'Economic & Retail Update: H2 2016', Verdict, September 2016

from the UK's exit from the EU and for any future update to this Study to take appropriate consideration of such changes.

Implications for South Ribble

- 2.29 Whilst we believe that the above trends have a number of potential implications for retail and leisure provision within South Ribble Borough, we believe that the size of the Borough's centres has meant that it has largely been impervious to the 'polarisation' trend. This is because the Borough's centres are generally relatively small and typically meet local day to day convenience goods and service needs, which ensures that they do not tend to compete directly with higher order centres such as Preston. As we explore further later in this report, their reliance on meeting local needs generally appears to have ensured that they have a continuing role and function and are typically the subject of below average vacancy rates.
- 2.30 Notwithstanding this, retail activity in South Ribble has reflected wider market conditions with planning permissions for large food superstores at Cuerden Way¹⁵ (which was to be occupied by Morrisons) and Penwortham¹⁶ (Sainsbury's) not taken forward. South Ribble is also now relatively well provided for in respect of discount foodstores, with both Aldi and Lidl trading from the authority area. We are aware that there is likely to be further future interest in providing additional discount foodstores, and that the recently submitted planning application (reference 07/2017/0211/ORM) which seeks to provide for the redevelopment of the Cuerden Strategic Site includes a discount foodstore as part of the proposed retail floorspace.
- 2.31 Whilst the growth of online retailing is likely to have had a detrimental impact on the turnover of the Borough's foodstores in particular, going forward there may be opportunities for the Borough's retail facilities to benefit from multi-channel retailing in order to help drive footfall and sustain retailer representation. Such opportunities will likely be driven in the first instance by national multiple retailers – and are therefore of particular relevance to larger retail venues, such as the Capitol Centre – but there are also likely to be opportunities for smaller centres to provide click and collect facilities, which encourage residents to visit the centres.

¹⁵ Planning permission reference 07/2013/0927

¹⁶ Planning permission reference 07/2011/0380/FUL

3.0 Planning Policy Context

Introduction

- 3.01 Given that this Study seeks to provide important evidence to assist in the production of future retail and office planning policy, it is appropriate to review existing national planning policy of relevance to retail and town centre matters to explore the context for the Study and how it may impact upon the drafting of future development plan policy. We also summarise South Ribble's adopted planning policy, insofar as it is relevant to retail and other town centre matters, in order to consider the Council's strategy in respect of its centres.

National Planning Policy Framework

- 3.02 The National Planning Policy Framework was published in March 2012. The NPPF replaced all former Planning Policy Statements, Planning Policy Guidance Notes and some Circulars in a single consolidated document.
- 3.03 The main theme of the NPPF is that there should be 'a presumption in favour of sustainable development'. In terms of plan-making, it is stated that local planning authorities should positively seek opportunities to meet the development needs of their area, with an emphasis on Local Plans having sufficient flexibility to adapt to rapid change.
- 3.04 In terms of economic development, it is set out within the NPPF's core principles that planning should proactively drive and support economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs. Every effort should be made to objectively identify and then meet the business and other development needs of an area, with positive responses made to wider opportunities for growth.
- 3.05 The NPPF stresses the Government's commitment to securing economic growth in order to create jobs and prosperity, with paragraph 17 stating that the planning system should do everything it can to support sustainable economic growth.
- 3.06 Paragraph 19 indicates that planning should operate to encourage and not to act as an impediment to sustainable growth, and that significant weight should be placed on the need to support economic growth through the planning system. The NPPF seeks to ensure that local planning authorities plan proactively to meet the development needs of business and support an economy fit for the 21st century.

3.07 The NPPF still recognises the need to promote the vitality and viability of towns and cities through the promotion of competition and growth management during the plan period. Paragraph 23 of the NPPF provides guidance for local planning authorities in drawing up Local Plans, it indicates that they should:

- recognise town centres as the heart of their communities and pursue policies to support their vitality and viability;
- 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, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;
- promote competitive town centres that provide customer choice and a diverse retail offer 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;
- allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centre. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Local planning authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites;
- allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;
- set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
- recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites; and
- where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.

South Ribble Retail and Leisure Study

- 3.08 Paragraph 23 also indicates that needs for retail, leisure, office and other main town centre uses should be met in full and should not be compromised by limited site availability.
- 3.09 Paragraph 24 requires local planning authorities to adopt a sequential approach to the consideration of planning applications for main town centre uses that are not in an existing centre or in accordance with an up-to-date Local Plan. The following paragraph 25 indicates that that the sequential approach should not apply to applications for small scale rural offices or other small scale development.
- 3.10 Paragraph 26 indicates that local planning authorities should require an impact assessment for retail, leisure and office development outside of town centres which are not in accordance with an up-to-date Local Plan and if the development is over a proportionate, locally set threshold. Where there is no locally defined threshold, the default threshold will be 2,500 sq.m.
- 3.11 Paragraph 27 indicates that where an application fails to satisfy the sequential test or is likely to have a significant adverse impact on the vitality and viability of a town centre or on existing, planned, committed investment in a centre it should be refused.
- 3.12 The NPPF also recognises that retail activity should still, where possible, be focused in existing town centres. Retail and leisure proposals which cannot be accommodated in or adjacent to the town centre will have to satisfy a dual impact test and the sequential test.

Ensuring the Vitality of Town Centres Planning Practice Guidance

- 3.13 The 'Ensuring the Vitality of Town Centres' National Planning Practice Guidance was published in March 2014. It provides a concise summation of how retail and main town centre planning policy is to be applied in practice. The objectives of the Practice Guidance remain comparable with those of its predecessor, with there being a stated requirement for local planning authorities to plan positively and support town centres in order to generate local employment, promote competition within and between town centres, and create attractive and diverse places for users.
- 3.14 The Practice Guidance requires local planning authorities to fully assess and plan to meet needs for main town centre uses through the adoption of a 'town centre first' approach. Paragraphs 002 and 003 confirm that this should be delivered through a positive vision or strategy which is communicated through the development plan. The strategy should be

South Ribble Retail and Leisure Study

facilitated through active engagement with the private sector and other interested organisations (including Portas Pilot organisations, Town Teams and so on). Any strategy should be based on evidence which clarifies the current state of town centres and opportunities to meet development needs and support centres' vitality and viability.

3.15 Such strategies should seek to address the following matters:

- the appropriate and realistic role, function and hierarchy of town centres in the area of over the plan period, including an audit of the vitality and viability of existing town centres and their ability to accommodate new development;
- consideration of the vision for the future of each town centre and the most appropriate mix of uses;
- the assessment of the scale of development that a town centre can accommodate;
- the timeframe for new retail floorspace to be delivered;
- what other complementary strategies are necessary or appropriate to enhance the town centre to deliver the vision in the future; and
- the consideration of the enhancement of car parking provision including charging and enforcement mechanisms.

3.16 Paragraph 005 of the Practice Guidance identifies a series of key indicators which are of relevance in assessing the health of a centre over time. Paragraph 005 goes on to state that not all successful town centre regeneration initiatives have been retail-led or focused on substantial new development, but have instead involved improvements such as renewed public realm, parking, and accessibility and other partnership mechanisms.

3.17 Paragraph 009 reaffirms the town centre first policy in the form of the sequential test, which requires local planning authorities to undertake an assessment of candidate sites' availability, suitability and viability when preparing their local plan. Such an assessment should also consider the scale of future needs and the type of land required to accommodate main town centre uses.

Housing and Economic Development Needs Assessment Planning Practice Guidance

3.18 The Government has issued further Practice Guidance to provide specific instruction in respect of the undertaking of needs assessments (including those for main town centre uses). Paragraph 032 of the Housing and Economic Development Needs Assessments Planning

Practice Guidance states that plan makers should consider forecasts of quantitative and qualitative need based on a range of data which is current and robust. Local planning authorities will need to take account of business cycles and make use of forecasts and surveys to assess requirements.

Relaxation of Permitted Development Rights

- 3.19 At a national level, recent changes to the Town and Country Planning (General Permitted Development) Order 1995 have sought to support the diversification and vitality of town centres. The changes follow the Portas Report's recommendation to make it easier to change surplus space in order to provide for the effective re-use of buildings.
- 3.20 The Town and Country Planning (General Permitted Development) (England) Order 2015 came into force on 15 April 2015. The Order acts, *inter alia*, to consolidate and replace the Town and Country Planning (General Permitted Development Order 1995) and to provide additional permitted development rights. It should be noted that conditions and restrictions apply, and that prior approval is generally required in order to implement development. The new rights include:
- a permitted change of use from retail/financial services (Class A1/A2), betting offices and pay day loans shops to residential (Class C3);
 - a permitted change of use from amusement arcade/casino (*sui generis* use) to residential use (Class C3);
 - a permitted change from retail (Class A1) to financial services (Class A2);
 - a permitted change from retail/financial services (Class A1/A2) to food and drink (Class A3);
 - a permitted change from retail/financial services (Class A1/A2), betting offices, pay day loan shops and casinos to assembly and leisure uses (Class D2);
 - an extension of the temporary permitted development rights introduced in May 2013 for extensions to shops, offices, industrial and warehouse buildings to support business expansion and the economy so they apply permanently;
 - the erection of click and collect facilities within the curtilage of a retail shop; and
 - modifications to the size of an existing retail shop loading bay.
- 3.21 The Town and Country Planning (General Permitted Development) (England) (Amendment) Order 2016 subsequently came into force on 6 April 2016. The Amendment provides for the change of use of laundrettes to residential uses as permitted development, and acts to make

South Ribble Retail and Leisure Study

permanent previous temporary provisions which permit the change of use from office to residential use. A condition allowing the local planning authority to consider noise impacts on the intended occupants of the development from premises in commercial use is included in the extended right.

- 3.22 The intended consequence of the above measures is to secure the redevelopment and reuse of premises. It is considered that the relaxation in respect of changes of use to residential are more likely to encourage re-use of offices in larger metropolitan areas which may benefit from a greater supply of office buildings.

South Ribble Council Development Plan Policy

- 3.23 The adopted development plan for South Ribble currently comprises the Central Lancashire Core Strategy DPD (2012), the Local Plan (2015) and the Joint Lancashire Minerals and Waste Local Plan, which is made up of several documents. The latter is not considered to be of relevance to the preparation of this Retail Study and, as such, we concentrate on the adopted policies within the Core Strategy and the Local Plan below.

Core Strategy DPD

- 3.24 The Central Lancashire Core Strategy DPD was adopted in July 2012. The Core Strategy was produced by the Central Lancashire authorities of Preston, South Ribble and Chorley to help co-ordinate development in the area, and to boost investment and employment within the three authorities. It is a single strategy and the three authorities are committed to applying the policies consistently.
- 3.25 Policy 1 states that growth and investment will be focussed on well located brownfield sites and the Strategic Location of Central Preston, the Key Service Centres of Chorley and Leyland, and other main urban areas in South Ribble. The policy goes on to state that a particular focus should be the regeneration of Leyland town centre and the regeneration of Bamber Bridge district centre.
- 3.26 Paragraph 5.33 of the Core Strategy refers to the Cuerden Strategic Site and identifies it as a major inward investment site for high technology industrial and business development.

South Ribble Retail and Leisure Study

3.27 Policy 11 relates specifically to retail and town centre uses and business based tourism. The policy states:

'Retail and other town centre uses of a scale appropriate to the retail hierarchy and in sustainable locations will be supported, provided that the development respects the character of the centre, including its special architectural and historic interest and assists in maintaining its existing retail function.'

The key elements of the hierarchy are:

- **City Centre: Preston**
- **Principal Town Centres: Leyland and Chorley**

Borough Centres: Bamber Bridge, Clayton Green, Longton, Penwortham and Tardy Gate, and those proposed at Buckshaw Village and Cottam

Retail and town centre uses will be delivered in the following ways:

- a) **Delivering a mixed-use scheme to facilitate the regeneration of the Tithebarn Regeneration Area of Preston.**
- b) **Encouraging other retail, office and leisure investment of an appropriate scale in Preston city centre, so as to retain its role as the largest retail, commercial and service centre in the Lancashire as a whole.**
- c) **Maintaining and improving the vitality and viability of Chorley town centre by building on the success of the Market Walk shopping centre, through investing in further retail development, supporting a range of other retailers and services, as well as improving the centre's appearance and accessibility.**
- d) **Maintaining and improving the vitality and viability of Leyland town centre, in particular the accessibility, design and environmental improvements put forward in the Leyland Town Centre Masterplan.**
- e) **Maintaining, improving and controlling the mix of uses in the existing Borough and Local Centres and proposed centres at Strategic Sites and Locations, so as to appropriately serve local needs.**
- f) **Focussing main town centre uses in the defined town centres.**
- g) **Supporting city and town centre development providing for tourists and visitors, particularly business based tourism.'**

[South Ribble Local Plan](#)

3.28 The South Ribble Local Plan was adopted in July 2015. It sets out the Vision for the Borough and the Council's interpretation of the Central Lancashire Core Strategy as summarised above.

The Local Plan also allocates or protects land for different uses, such as housing and employment.

3.29 The overall Vision of the Local Plan is provided at paragraphs 3.8 to 3.10 and reads as follows:

'The ambition (Vision) of the plan is to secure economic growth by ensuring the infrastructure required to facilitate this growth is provided as quickly as possible for the benefit of current and future residents and businesses in the borough. It is in this context that sites for new housing and employment have been selected. Features such as Green Belt which make the borough attractive are protected and, where possible, enhanced.'

This approach represents the Council's definition of sustainable development. To be and to remain sustainable, the borough must invest in infrastructure to secure economic growth and housing development, but protect the quality of the environment. For a development to be sustainable it must contribute to necessary infrastructure, and protect and enhance the quality of the environment of the borough.

The Vision of this Plan is that by 2026 the pattern of development in the borough will be sustainable with the necessary infrastructure, homes and jobs being available for all in a quality environment.'

3.30 Policy E3 relates to Leyland town centre and identifies uses which will be appropriate within defined Primary and Secondary Retail Frontages. Within Leyland's Primary Retail Frontage as defined by Appendix 3 of the Local Plan, planning permission will be granted for Class A1, Class A3, other town centre uses, and living accommodation or Class B1 (Office) uses at first floor. Policy E3 goes on to state that the remaining part of the defined town centre is classified as the Secondary Retail Frontage, which may accommodate Class A1, A3 and A4 uses.

3.31 Policy E4 relates to district centres and indicates that the centres of Bamber Bridge, Longton Penwortham and Tardy Gate will be protected and enhanced so as to maintain their vitality and viability. The policy states that planning permission will be granted within the centres for Class A1 and A3 uses, and that applications for other uses (including Class A2, A4 and B1 uses) will also be permitted where this would not harm the sustainability of the shopping area.

3.32 Policy E5 relates to local centres and identifies nine defined local centres. The policy states that, within local centres, Class A1 uses will be protected and enhanced wherever possible in



order that they comprise a minimum of 60% of uses. Proposals for other uses may be appropriate where it does not undermine the sustainability of the shopping area.

4.0 Original Market Research

Introduction

- 4.01 The undertaking of original market research enables an in-depth analysis at a local level and allows the evaluation of the retail turnover and trade draw of particular town centres. The use of specifically commissioned and tailored survey research is fundamental to identifying the likely capacity for future retail floorspace across the Study Area. Notwithstanding this, WYG acknowledges that there can be limitations to survey research, particularly with regard to the sample size which can be achieved, and the results should therefore be taken to be a broad indication of consumer preferences.
- 4.02 A key requirement of this Study is the detailed understanding of shopping patterns in terms of the use of retail centres and the identification of the centres' catchment areas. WYG commissioned specialist market researchers NEMS to undertake a comprehensive household telephone survey to identify consumers' habits and preferences in the Study Area.
- 4.03 We set out the general methodological approach to the surveys and the key results below.

Household Survey

- 4.04 A survey of 1,000 households was undertaken in October 2016, asking a total of 55 questions in respect of residents' retail and leisure habits. The survey covered eight zones, of which Zones 1 to 5 broadly cover the South Ribble Borough area and Zones 6 to 8 cover the outlying 'buffer' areas.
- 4.05 Table 4.1 below sets out the postcode sectors which comprise each of the eight zones within the Study Area. The full map of the Study Area is provided at Appendix 1. The household survey questions and full tabulation of the results from the household survey are provided at Appendix 2.

Table 4.1: Postcodes by Survey Zone

Survey Zone	Postcode Sectors
1	PR25 1, PR25 2, PR25 3, PR25 4, PR26 6, PR26 7
2	PR5 4, PR5 5, PR5 6, PR5 8
3	PR1 0, PR1 9
4	PR4 4, PR4 5
5	BB2 7, PR5 0
6	PR25 5, PR6 7, PR6 8, PR7 7
7	PR4 6, PR7 6, PR26 8, PR26 9
8	PR1 3, PR1 4, PR1 5, PR1 8, PR2 2, PR2 5

- 4.06 The results of the household survey are utilised to calculate the expenditure claimed by each existing retail facility within the Study Area, a process which is considered in Section 7 of this report.
- 4.07 The household survey is also of assistance in identifying the market share claimed by specific retail destinations, the frequency of visits to purchase various types of goods, the incidence of linked trips, the most popular means of accessing town centre facilities, the use of other town centre facilities, and so on.
- 4.08 Our market share analysis utilises the same NEMS dataset that is relied on in assessing quantitative need and therefore our commentary relates to tangible retail destinations only (in other words, expenditure which is committed through the internet and other special forms of trading does not form part of the market share element of the commentary that follows). The analysis that follows relates to the market share of *trips* to undertake particular types of shopping at particular destinations and is not necessarily reflective of the market share of overall Study Area *expenditure* secured by those same destinations.
- 4.09 In our view, the consideration of market share of trips (rather than market share of expenditure) is of particular interest as it accurately allows changes in customers' shopping habits to be monitored over time. We do however also consider the market share of expenditure later at Section 6 of this report.
- 4.10 Accordingly, we consider below the market share of trips to particular retail venues and defined centres to purchase both convenience goods (both main and top-up shopping trips) and comparison goods.

4.11 For convenience goods, respondents were questioned in respect of where they last visited and where they visited 'the time before last' to undertake 'main' food shopping (which may take the form of a large 'trolley' shop and be undertaken on a weekly basis) and 'top up' food shopping (which is usually undertaken on a more frequent basis and generally involves the purchase of grocery staples, such as milk and bread, through a 'basket' shop). For comparison goods, respondents have been questioned in respect of where they last visited to purchase eight separate types of comparison goods (clothing and footwear; CDs, DVDs and books; small household goods; toys and recreation goods; chemist goods; electrical goods; furniture; and, DIY goods).

Convenience Goods Shopping Patterns

- 4.12 The household telephone survey allows the assessment of convenience goods shopping across the Study Area. Convenience goods shopping patterns tend to be more localised than comparison goods shopping, as customers generally seek to source such goods close to home. However, in more rural or remote areas, it is often the case that shoppers have to travel further to undertake main food and comparison goods shopping, due to a relative lack of choice.
- 4.13 Table 4.2 considers, on a zonal basis, the proportion of main food and top-up food shopping trips undertaken to destinations within the South Ribble administrative boundary. The table demonstrates that the greatest proportion of convenience goods shopping trips to destinations within South Ribble are undertaken from Zone 1, where 93.9% of main food shopping trips and 95.8% of top-up food shopping trips are claimed by facilities in the Borough. The high proportion of trips directed towards destinations within South Ribble from Zone 1 is unsurprising given its location and proximity to a number of different large foodstores (including the Aldi, Lidl, Morrisons and Tesco Extra stores in Leyland).
- 4.14 South Ribble's convenience goods facilities secure a lower proportion of shopping trips which originate within Zones 5 to 8, which are located entirely or partly outside of the South Ribble administrative boundary. As such, residents in these zones frequently use facilities outside of the Borough to undertake their main food and, in particular, their top-up food shopping.

Table 4.2: Main and Top-up Food Shopping Trips Directed to Destinations in South Ribble Borough

	1	2	3	4	5	6	7	8	Total
Main Food	93.9%	68.6%	55.2%	83.9%	47.8%	34.7%	30.9%	8.9%	51.8%
Top-Up Food	95.8%	80.2%	89.3%	92.2%	32.4%	16.4%	12.0%	4.5%	53.6%

- 4.15 The below Table 4.3 sets out the top three destinations for main food shopping trips on a zonal basis. For residents of Zone 1, the most popular main food shopping destination is the Tesco Extra at Towngate in Leyland (which secures 29.3% of main food shopping trips which originate within the zone), followed by the Morrisons at Olympian Way in Leyland (23.5%), and then the Aldi at Towngate in Leyland (22.5%). All three of these stores are located within Zone 1 and are in edge or out of centre locations.
- 4.16 For residents of Zone 2, the most popular destinations for main food shopping is the Sainsbury's at Cuerden Way (which secures 24.9% of main food shopping trips which originate within the zone), followed then by the Aldi at Cuerden Way (19.8%). Whilst both of these destinations are located within Zone 2, the third most popular main food shopping destination for residents of the zone is the Asda at Clayton Green (15.7%), which is in Zone 6 and is in Chorley Borough.
- 4.17 The most popular stores for main food shopping for residents of Zones 3, 4 and 5 are respectively: the Morrisons at Mariners Way (in the Preston administrative area, which secures 21.9% of main food shopping trips which originate in Zone 3); the Aldi at Towngate in Leyland (which secures 14.3% of main food shopping trips which originate in Zone 4); and, the Sainsbury's at Cuerden Way (which secures 17.6% of main food shopping trips which originate in Zone 5).
- 4.18 Interestingly, foodstores operated by retailers who are not part of the 'big four' comprise very popular destinations to undertake main food shopping across the South Ribble authority area. Aldi stores (at either Towngate in Leyland and at Cuerden Way) feature in the top three most popular destinations for main food shopping in Zones 1, 2, 4 and 5, and the Booths at Millbrook Way is the second most popular destination in Zone 3.
- 4.19 Across the Study Area as a whole, the most popular main food shopping destination is the Sainsbury's at Cuerden Way (which secures 9.6% of main food shopping trips undertaken

across the Study Area), followed by the Asda at Clayton Green Centre (8.1%), and then by the Morrisons at Olympian Way (7.8%).

Table 4.3: Principal 'Main' Food Shopping Destinations by Zone

Zone	Main Destinations	Location of Store
1	1. Tesco Extra, Towngate, Leyland (29.3%) 2. Morrisons, Olympian Way, Leyland (23.5%) 3. Aldi, Towngate, Leyland (22.5%)	Zone 1 Zone 1 Zone 1
2	1. Sainsbury's, Cuerden Way, Preston (24.9%) 2. Aldi, Cuerden Way, Preston (19.8%) 3. Asda, Clayton Green (15.7%)	Zone 2 Zone 2 Zone 6
3	1. Morrisons, Mariners Way (21.9%) 2. Booths, Millbrook Way (18.0%) 3. Sainsbury's, Cuerden Way, Preston (10.4%)	Zone 8 Zone 3 Zone 2
4	1. Aldi, Towngate, Leyland (14.3%) 2. Sainsbury's, Cuerden Way (12.9%) 3. Morrisons, Olympian Way, Leyland (12.8%)	Zone 1 Zone 2 Zone 1
5	1. Sainsbury's, Cuerden Way (17.6%) 2. Aldi, Cuerden Way (15.7%) 3. Asda, Clayton Green (8.5%)	Zone 2 Zone 2 Zone 6
6	1. Asda, Clayton Green Centre (23.0%) 2. Aldi, Harpers Lane, Chorley (9.3%) 3. Aldi, Lancaster Way, Chorley (7.7%)	Zone 6 OSA Zone 6
7	1. Tesco Extra, Foxhole Road, Chorley (13.4%) 2. Aldi, Towngate, Leyland (8.6%) 3. Morrisons, Olympian Way, Leyland (6.6%)	OSA Zone 1 Zone 1
8	1. Morrisons, Mariners Way, Preston (16.2%) 2. Morrisons, Blackpool Road, Preston (9.7%) 3. Sainsbury's, Flintoff Way, Preston (8.3%)	Zone 8 OSA OSA
Study Area	1. Sainsbury's, Cuerden Way (9.6%) 2. Asda, Clayton Greene (8.1%) 3. Morrisons, Olympian Way, Leyland (7.8%)	Zone 2 Zone 6 Zone 1

4.20 Turning to top-up shopping trip patterns, the most popular destination for residents of Zone 1 is the Tesco Extra at Towngate in Leyland (which secures 21.7% of top-up shopping trips which originate within the zone), followed then by smaller convenience stores in Leyland town centre (13.3%). The market share of top-up food shopping trips which both originate and are undertaken within Zone 1 is very high at 90.4%. This is reflective of the propensity for top-up shopping to be undertaken close to home where appropriate facilities are available.

4.21 The most popular top-up food shopping destination for residents of Zone 2 is the Morrisons at Station Road in Preston (which secures 14.9% of top-up food shopping trips which originate

within the zone) trips, and, for residents of Zone 3, the most popular top-up food shopping venue is the Booths at Millbrook Way (23.2%). The Booths at Liverpool Road in Preston is the most popular top-up shopping destination for residents of Zone 4 (securing a very significant 48.2% of top-up food shopping trips which originate within the zone).

- 4.22 In Zone 5, the most popular destinations for residents are the Spar stores at Alder Drive in Hoghton and Rothesay Road in Blackburn (the latter of which is in the Blackburn with Darwen administrative area). The popularity of the Spar stores is reflective of their proximity and the zone's relative remoteness to larger foodstores.
- 4.23 Other smaller convenience stores which comprise popular venues for top-up food shopping within the Borough include Co-op stores, Spar stores, Tesco Express stores and smaller local shops within defined centres. Overall, Zones 1 to 4 retain a relatively high level of top-up food shopping trips, with more than 65% of trips which originate in these zones being undertaken to a retail venue within the same zone.

Table 4.4: Principal 'Top-up' Food Shopping Destinations by Zone

Zone	Main Destinations	Location of Store
1	1. Tesco Extra, Towngate, Leyland (21.7%) 2. Leyland town centre (13.3%) 3. Co-op, Dunkirk Lane, Leyland (10.0%)	Zone 1 Zone 1 Zone 1
2	1. Morrisons, Station Road, Preston (14.9%) 2. Sainsbury's, Cuerden Way (13.7%) 3. Bamber Bridge District Centre (13.2%)	Zone 2 Zone 2 Zone 2
3	1. Booths, Millbrook Way, Preston (23.2%) 2. Sainsbury's Local, Birch Avenue, Preston (18.3%) 3. Penwortham District Centre (18.2%)	Zone 3 Zone 3 Zone 3
4	1. Booths, Liverpool Road, Preston (48.2%) 2. Longton District Centre (10.7%) 3. Spar, Liverpool Old Road, Preston (10.1%)	Zone 4 Zone 4 Zone 4
5	1. Spar, Alder Drive, Hoghton (14.6%) 2. Spar, Rothesay Road, Blackburn (11.2%) 3. Sainsbury's, The Volunteer, Bolton (10.6%)	Zone 5 Outside SA Outside SA
6	1. Asda, Clayton Green Centre, Clayton (19.6%) 2. Tesco, Buckshaw Village, Chorley (12.6%) 3. Tesco Express, Pendle Road, Leyland (11.8%)	Zone 6 Zone 6 Zone 6
7	1. Runshaw Lane Local Centre (18.2%) 2. Booths, Station Road, Preston (17.2%) 3. Co-op, Church Road, Preston (10.1%)	Zone 7 Zone 7 Zone 7
8	1. Preston city centre (14.6%) 2. Morrisons, Blackpool Road, Preston (11.1%) 3. Tesco Express, Blackpool Road, Preston (10.2%)	Outside SA Outside SA Outside SA
Study Area	1. Tesco Extra, Towngate, Leyland (4.8%) 2. Booths, Liverpool Road, Preston (4.2%) 3. Booths, Millbrook Way (3.9%)	Zone 1 Zone 4 Zone 3

Comparison Goods Shopping Patterns

- 4.24 In respect of comparison goods shopping patterns, the below Table 4.5 identifies the market share secured by retail venues within South Ribble Borough across eight comparison goods sub-categories and presents the findings on a zonal basis.
- 4.25 Table 4.5 demonstrates that, in terms of clothing and footwear shopping, retail venues within South Ribble Borough secure just 14.0% of all such shopping trips which originate within the Study Area. This is reflective of the fact that consumers generally seek to benefit from greater choice when buying such items and, therefore, often make clothing and footwear purchases at higher order centres such as Preston city centre.

South Ribble Retail and Leisure Study

- 4.26 The two non-bulky comparison goods sub-categories for which South Ribble has the highest market share are small household goods (for which South Ribble secures a market share of 45.6% of all such trips which originate within the Study Area) and chemist goods (37.4%). We believe that the small household goods market share is reflective of the strong offer provided in this regard at the Capitol Centre and at facilities around Cuerden Way, near Bamber Bridge. Chemist goods are often sourced close to home in a similar manner to food shopping.
- 4.27 Turning to bulky goods shopping, retail venues in South Ribble secure relatively strong market shares in respect of trips to purchase DIY goods (62.2% of all such trips which originate within the Study Area are to destinations in South Ribble) and electrical goods (47.7%). These figures are again reflective of the strength of facilities at the Capitol Centre and at Cuerden Way. By way of contrast, South Ribble secures a relatively low market share of trips to purchase furniture goods (just 27.7% of all such trips which originate within the Study Area are to destinations within the Borough).

Table 4.5: South Ribble Borough Market Share Retention Levels by Category of Goods and Zone

Goods Category	1	2	3	4	5	6	7	8	Total
Non-Bulky Goods									
Clothing & Footwear	26.6%	26.3%	6.0%	6.5%	15.3%	12.0%	5.3%	4.0%	14.0%
CDs, DVDs and Books	61.4%	34.2%	14.2%	32.8%	4.5%	18.9%	13.1%	0.0%	22.8%
Small Household	63.7%	45.4%	52.0%	36.0%	55.4%	52.6%	34.4%	21.9%	45.6%
Recreation Goods	54.8%	36.5%	18.5%	17.6%	1.6%	24.5%	19.2%	13.4%	27.0%
Chemist Goods	68.3%	74.6%	40.8%	50.1%	18.0%	29.0%	9.7%	3.6%	38.4%
Bulky Goods									
Electrical Goods	66.2%	71.0%	53.7%	60.4%	54.3%	40.5%	17.5%	24.4%	47.7%
DIY Goods	84.3%	86.4%	63.1%	81.3%	50.4%	51.3%	36.2%	30.3%	62.2%
Furniture Goods	45.8%	39.3%	21.0%	37.8%	13.0%	18.5%	13.7%	14.2%	27.7%

South Ribble Retail and Leisure Study

Non-Bulky Shopping Patterns

- 4.28 We set out below a more detailed analysis of shopping behaviour and the dominant retail venues for each of the comparison goods sub-categories. The eight sub-categories are aggregated into 'non-bulky' and 'bulky' comparison retailing for the purpose of our analysis. We first consider non-bulky comparison goods shopping patterns.
- 4.29 The below Table 4.6 identifies the principal destinations for clothing and footwear shopping on a zonal basis for all residents of the Study Area. It is relevant to consider clothing and footwear shopping patterns in particular detail due to the high level of expenditure directed to this type of shopping (such expenditure accounts for around 29% of total comparison goods expenditure).
- 4.30 Table 4.6 demonstrates that in each of the eight zones, Preston city centre is the most popular destination to undertake clothing and footwear shopping. It secures more than six out of every ten trips to make clothing and footwear purchases which originate in Zones 3, 4 and 8, and across the Study Area as a whole accounts for 45.8% of all such shopping trips.
- 4.31 The Capitol Centre is a relatively popular venue for clothing and footwear shopping for residents of Zones 1 and 2 (it secures 10.6% of clothing and footwear shopping trips which originate in Zone 1 and 9.2% of such trips in Zone 2). However, Bamber Bridge is the only district centre in South Ribble to feature as one of the top three clothing and footwear shopping venues in any of the eight zones; it is the second most popular venue to visit to make such purchases in Zone 2, securing 12.0% of such shopping trips which originate in the zone.
- 4.32 Across the Study Area as a whole, the second most popular venue for clothing and footwear shopping is Deepdale Shopping Park, which one of the three most popular retail venues for clothing and footwear shopping in Zones 1, 3, 4, 5 and 8. Across the Study Area as a whole, Deepdale Shopping Park secures 10.2% of all trips to purchase clothing and footwear goods.

Table 4.6: Principal Clothing and Footwear Shopping Destinations by Zone

Zone	Main Destinations	South Ribble Retention Rate
1	1. Preston city centre (30.3%) 2. The Capitol Centre, Preston (10.6%) 3. Deepdale Shopping Park (10.4%)	8.1%
2	1. Preston city centre (44.7%) 2. Bamber Bridge district centre (12.0%) 3. The Capitol Centre, Preston (9.2%)	26.3%
3	1. Preston city centre (66.1%) 2. Deepdale Shopping Park, Preston (9.5%) 3. Blackpool town centre / The Trafford Centre (5.0%)	0.0%
4	1. Preston city centre (62.4%) 2. Deepdale Shopping Park (12.8%) 3. Southport town centre (5.9%)	1.3%
5	1. Preston city centre (33.9%) 2. Blackburn town centre (21.2%) 3. Deepdale Shopping Park (15.7%)	0.0%
6	1. Preston city centre (28.1%) 2. Middlebrook Retail Park (18.8%) 3. Chorley town centre (10.9%)	4.8%
7	1. Preston city centre (35.4%) 2. Southport town centre (19.5%) 3. Ocean Plaza Retail Park, Marina Drive (7.8%)	2.5%
8	1. Preston city centre (64.9%) 2. Deepdale Shopping Park (21.0%) 3. Boundary Mill, Colne (2.8%)	0.0%
Study Area	1. Preston city centre (45.8%) 2. Deepdale Shopping Park (10.2%) 3. Capitol Centre, Preston (5.3%)	16.9%

4.33 The household survey identifies the below key shopping patterns for other non-bulky comparison goods sub-categories.

- For small household goods, the Capitol Centre is the most popular shopping venue for residents of the Study Area; it secures 20.4% of all such shopping trips which originate within the Study Area. The second most popular venue is Preston city centre, which attracts 19.1% of all such trips. For residents of Zones 1 and 2, Leyland town centre is the most popular venue for purchasing small household goods (it respectively secures 16.5% and 18.4% of all such trips originating within the two zones). Unsurprisingly, given the proximity of the zones, Preston city centre is the most popular venue for this

type of comparison goods shopping for residents of Zones 3 and 4 (it respectively secures 26.6% and 30.3% of all such trips originating within the these two zones).

- For books, CDs and DVDs shopping, the most popular venue for Study Area residents is Preston city centre, which secures 47.1% of all such trips which originate within the Study Area. The second most popular venue for this type of shopping is Leyland town centre, which secures 14.1% of such trips. Leyland town centre is a particularly popular venue to purchase books, CDs and DVDs for residents of Zone 1, with more than half (55.0%) of such shopping trips which originate from this zone being claimed by the centre. Preston city centre is the most popular venue to purchase books, CDs and DVDs for residents of Zones 2, 3, 4 and 5 (it respectively secures 45.0%, 65.4%, 47.0% and 55.1% of all shopping trips to make such purchases which originate within these zones).
- For toys and recreational goods, the most popular destination across the Study Area as a whole is Deepdale Shopping Park, which secures 22.1% of all such trips. The second most popular venue is Leyland town centre, which secures 19.8% of all such trips, followed then by Preston city centre, which attracts 19.1% of these trips.
- For chemist goods, Preston city centre is the most popular venue for all residents in the Study Area, securing 30.4% of all such shopping trips. The second most popular venue is Leyland town centre, which secures 15.6% of these trips. However, residents use a number of different local venues to meet such needs, which is reflective of the fact that some chemist goods tend to be purchased close to home in a similar manner to convenience goods.
- For each type of non-bulky comparison good purchased, there is a significant proportion of shopping trips which are undertaken from the Study Area to destinations outside of the South Ribble area. This is, in part, a consequence of the Borough's proximity to Preston city centre which fulfils a sub-regional role and appropriately helps to meet the needs of the Borough's residents.

4.34 It is evident that, for non-bulky comparison goods shopping, Preston city centre is the dominant venue across the Study Area as a whole. Leyland town centre and Deepdale Shopping Park also perform significant roles in helping to meet non-bulky comparison goods shopping needs. Deepdale Shopping Park accommodates a relatively wide range of national multiples and, given its free, surface car parking, is an attractive option for residents of South Ribble who have access to a car.

Bulky Shopping Patterns

4.35 The bulky comparison goods sector comprises the electrical, furniture and DIY goods sub-categories. Retailers selling bulky goods are often located at edge or out of centre retail parks

as a consequence of their requirement for proximate surface car parking, easy servicing and large footprint units. Whilst a wider range of retailers have taken space at retail parks in recent years due to a general trend for restrictive conditions to be relaxed, they still serve an important role in meeting bulky goods needs.

- 4.36 The Capitol Centre is situated to the south of Preston city centre (within South Ribble Borough) and contains Currys PC World, Dunelm Mill and HomeSense, all of which sell elements of bulky goods and, as such, attract a high proportion of bulky goods shopping trips. However, in centre destinations, such as Preston city centre and Leyland town centre, also attract a reasonably large proportion of bulky goods shopping trips, which demonstrates the relatively strong variety of retailers located within these defined centres.
- 4.37 The household survey identifies the below key shopping patterns for the bulky comparison goods sub-categories.
- For electrical goods, the most popular venue for residents of the Study Area is the Capitol Centre, which attracts 32.4% of all such shopping trips, followed then by Preston city centre, which attracts 16.8% of trips. For residents of Zones 1 to 6, the Capitol Centre is the most popular destination, securing between 22.3% and 59.3% of all such trips which originate in these six zones. For residents of Zone 7, the most popular venue for electrical goods shopping is Chorley town centre and, for residents of Zone 8, the most popular venue is Deepdale Shopping Park.
 - For DIY goods, the most popular venue for Study Area residents is the large B&Q at South Rings Business Park, which attracts 43.3% of all such trips. The B&Q is the most popular destination for purchasing DIY goods for residents of seven of the eight zones (the exception being Zone 7, for which the most popular DIY venue is the B&Q in Chorley).
 - For furniture goods, Preston city centre is the most popular venue, attracting 16.6% of all such trips which originate within the Study Area. The second most popular venue is Leyland town centre, which attracts 10.6% of such trips across the Study Area. Leyland town centre is the most popular destination for furniture shopping for residents of Zone 1 (securing 33.3% of all such trips), and Tardy Gate is the most popular venue for residents of Zone 2 (22.3%).
- 4.38 It is evident from the above that out of centre retail venues, such as the Capitol Centre and South Rings Business Park, have an important role to play in meeting the Study Area's bulky goods shopping needs. However, Preston city centre still attracts a high proportion of

South Ribble Retail and Leisure Study

shopping trips to purchase electrical goods and furniture goods, demonstrating that the city centre's offer is relatively varied. For DIY goods, needs are principally met by B&Q stores in Preston and Chorley, which reflects the specialist nature of these goods.

In-Street Survey Responses

4.39 In-street surveys were undertaken in November 2016 in order to provide an insight into the views and behaviour of visitors to Leyland town centre, the four district centres, and the Capitol Centre. Between 101 and 106 surveys were completed at each of the six retail venues; we set out the key findings of the surveys below. A full copy of the survey results is provided at Appendix 3.

Reason for Visiting the Centre

4.40 Respondents were asked why they choose to shop or visit the centre. Table 4.7 identifies that the most common reason to visit five of the six centres (the exception being the Capitol Centre) is that the centre is close to home, with over 70% of respondents in the centres of Leyland, Bamber Bridge and Penwortham citing this factor. In respect of the Capitol Centre, the most common reason for visiting is the choice of high street retailers (identified by 36.8% of respondents), followed then by the choice of non-food shops (22.6%).

Table 4.7: Reason for Choosing to Shop / Visit the Centre

Centre	1st		2nd		3rd	
Leyland	Close to home	74.0%	Choice of non-food shops (joint 2 nd)	9.6%	Habit (joint 2 nd)	9.6%
Bamber Bridge	Close to home	79.2%	Choice of high street retailers	11.9%	Habit	6.9%
Longton	Close to home	52.5%	Accessibility to Longton	16.8%	Provision of services	6.9%
Penwortham	Close to home	70.3%	Close to friends/family	9.9%	Close to work	6.9%
Tardy Gate	Close to home	68.0%	Range of food shops	8.0%	Accessibility to Tardy Gate	7.0%
Capitol Centre	Choice of high street retailers	36.8%	Choice of non-food shops	22.6%	Close to home	19.8%

Source: NEMS In Street Survey, Question 10

South Ribble Retail and Leisure Study

- 4.41 In addition to asking why respondents generally chose to visit the centre, respondents were also asked their main reason for being in the centre on the day of the survey. Table 4.8 provides a summary of the top responses.
- 4.42 The most common response for the centres of Bamber Bridge, Longton, Penwortham and Tardy Gate was that respondents were there to visit specific foodstores (for example, Morrisons in Bamber Bridge and Booths in Longton). The second most popular reason to Bamber Bridge, Longton and Tardy Gate district centres was to visit a bank, building society or Post Office.
- 4.43 In Leyland town centre, the single most popular reason for being in the centre was to visit a bank or building society (identified by 15.4% of respondents as the reason for their visit). However, a large number of respondents in Leyland town centre cited the Tesco and Asda stores as being the principal driver of their visit (identified respectively by 10.6% and 8.7% of respondents in Leyland town centre), which is reflective of the strong convenience goods offer in the centre.
- 4.44 At the Capitol Centre, the most popular reason for the visit was to shop for clothing and footwear (identified by 32.1% of respondents), with a large number also being drawn there to shop at Waitrose (19.8%).

Table 4.8: Main Reason for Choosing to Visit the Centre on the Day of the Survey

Centre	1st		2nd		3rd	
Leyland	Bank/building society/Post Office	15.4%	Tesco, Towngate	10.6%	Asda, Towngate	8.7%
Bamber Bridge	Morrisons, Station Road	46.5%	Bank/building society/Post Office	23.8%	Aldi, Cuerden Way	6.9%
Longton	Booths, Liverpool Road	32.7%	Bank/building society/Post Office	14.9%	Doctor/dentist	9.9%
Penwortham	Spar, Liverpool Road	26.7%	Browsing	13.9%	Bank/building society/Post Office	12.9%
Tardy Gate	Spar, Victoria Terrace	14.0%	Bank/building society/Post Office	12.0%	Services & Glover's Bakery (joint 3 rd)	11.0%
Capitol Centre	Clothes/shoe shopping	32.1%	Waitrose	19.8%	Browsing	17.9%

Source: NEMS In Street Survey, Question 11

South Ribble Retail and Leisure Study

Mode of Travel to Centre

- 4.45 Respondents were asked how they had travelled to the town, district or retail centres on the day of the survey. In Leyland town centre, Longton district centre and the Capitol Centre, travelling by car was the most popular means to access the centre. However, the proportion of visitors to the Capitol Centre travelling by car is, at 89.6%, substantially higher than that recorded at Longton district centre (54.5%) and Leyland town centre (50.0%).
- 4.46 In the other three centres, walking was the most popular means of travelling to the centre, with more than half of visitors to Bamber Bridge, Penwortham and Tardy Gate accessing the centre by foot. Leyland has the greatest proportion of visits by bus, which is reflective of the greater number of services which travel to this centre.

Table 4.9: Method of Travel to the Centre

Centre	Car	Bus	Walk	Bike
Leyland	50.0%	12.5%	36.5%	1.0%
Bamber Bridge	39.7%	5.0%	53.5%	2.0%
Longton	54.5%	5.0%	37.6%	2.0%
Penwortham	33.7%	5.0%	57.4%	1.0%
Tardy Gate	25.0%	7.0%	67.0%	1.0%
Capitol Centre	89.6%	1.9%	5.7%	1.9%

Source: NEMS In Street Survey, Question 4

Food Shopping

- 4.47 Question 15 of the in-street survey asked respondents how frequently they visited the centre to undertake their main food and grocery shop. The majority of respondents in Leyland town centre and Bamber Bridge district centre indicated they visit the centre once a week or more often for this purpose.
- 4.48 The proportion of respondents undertaking a main food or grocery shop in Penwortham, Tardy Gate and the Capitol Centre on a regular basis was significantly less. In both Penwortham and Tardy Gate district centres, over 70% of respondents stated that they never visit the centre for main food and grocery shopping. This is reflective of these centres having a relatively limited convenience goods offer.

Table 4.10: Frequency of Visit to Undertake Main Food Shopping

Centre	Every-day	2 to 3 times a week	Once a week	Once a fortnight	Once a month	Less than once a month	Never	First time today
Leyland	13.5%	26.9%	35.6%	1.9%	2.9%	1.0%	14.4%	0.0%
Bamber Bridge	6.9%	19.8%	39.6%	5.9%	2.0%	2.0%	17.8%	0.0%
Longton	7.9%	20.8%	16.8%	9.9%	2.0%	3.0%	36.6%	0.0%
Penwortham	5.0%	5.0%	8.9%	1.0%	3.0%	5.0%	71.3%	0.0%
Tardy Gate	7.0%	7.0%	3.0%	2.0%	3.0%	3.0%	72.0%	0.0%
Capitol Centre	0.0%	13.2%	8.5%	3.8%	12.3%	3.8%	56.6%	1.9%

Source: NEMS In Street Survey, Question 15

4.49 Question 17 of the in-street survey asked respondents which centre or store they last visited to undertake main food and grocery shopping. The foodstores most commonly identified by respondents in Leyland town centre were the Tesco Extra at Towngate (which was identified by 25.0% of respondents as the venue for their last main food shop), the Morrisons at Olympian Way (18.3%), and the Aldi at Towngate (17.3%).

4.50 Across the other five centres, the following venues were identified by the greatest number of respondents as the location for their last main food shop:

- In Bamber Bridge, the Morrisons at Station Road is the most popular venue, identified by 45.5% of respondents.
- In Longton, the general facilities within the district centre itself are the most popular venue, identified by 17.8% of respondents.
- In Penwortham, the Morrisons at Mariners Way is the most popular venue, identified by 19.8% of respondents.
- In Tardy Gate, the Sainsbury's at Cuerden Way is the most popular venue, identified by 27.0% of respondents.
- At the Capitol Centre, the Waitrose at the Capitol Centre is the most popular venue, identified by 19.8% of respondents.

South Ribble Retail and Leisure Study

Non-Food Shopping

- 4.51 Respondents were also asked a series of questions in relation to their non-food shopping habits. The below Table 4.11 identifies the frequency of visit to each of the centres by respondents for non-food shopping purposes. The frequency of visit to the majority of the centres is not as high as it is for food shopping, but the proportion of respondents stating they never shop in certain centres is lower.
- 4.52 Bamber Bridge is the centre which has the highest frequency of visit for non-food shopping purposes, with 41.6% of respondents in this centre visiting more than once a week. Interestingly, only 26.4% of respondents in the Capitol Centre answered that they visit the centre more than once a week, which is reflective of its primary role as a comparison goods shopping venue.

Table 4.11: Frequency of Visit to Centre to Undertake Non-Food Shopping

Centre	Every day	2 to 3 times a week	Once a week	Once a fortnight	Once a month	Less than once a month	Never	First time today
Leyland	3.8%	10.6%	18.3%	11.5%	8.7%	3.8%	1.9%	0.0%
Bamber Bridge	1.0%	13.9%	26.7%	6.9%	6.9%	1.0%	1.0%	0.0%
Longton	0.0%	12.9%	22.8%	6.9%	7.9%	2.0%	7.9%	0.0%
Penwortham	4.0%	10.9%	24.8%	10.9%	12.9%	3.0%	17.8%	1.0%
Tardy Gate	5.0%	14.0%	23.0%	10.0%	12.0%	1.0%	15.0%	1.0%
Capitol Centre	2.8%	2.8%	20.8%	11.3%	22.6%	9.4%	5.7%	0.9%

Source: NEMS In Street Survey, Question 26

- 4.53 Respondents were also asked in which centre/facility they last shopped for non-food goods. The majority of respondents in Leyland stated that they last shopped in Leyland town centre (identified as the venue last visited for non-food shopping by 38.5% of respondents) or in Preston city centre (31.7%). In Bamber Bridge, the majority of respondents indicated that their last non-food shopping trip was to either Bamber Bridge district centre (40.6%) or Preston city centre (23.8%). Similarly, in Longton district centre, the majority of respondents' most recent non-food shopping trip was either to the district centre itself (35.6%) or to Preston city centre (30.7%).

4.54 In both Penwortham and Tardy Gate, a majority of respondents indicated that their last non-food shopping trip was to Preston city centre (59.4% and 52.0% of respondents in each centre respectively provided this response). At the Capitol Centre, the venue most frequently identified as being last visited by respondents to undertake non-food shopping was the Capitol Centre itself (identified by 33.0% of respondents), followed by Preston city centre (17.9%) and Deepdale Shopping Park (10.4%).

Comparison to Other Centres

4.55 The in-street survey also asked respondents compare the attributes of the centre they were visiting to competing centres of a similar size. Respondents were questioned on factors such as: choice and quality of shops; range of banks and financial services; choice of pubs and restaurants; leisure facilities; the town centre environment; cleanliness; car parking provision; car parking prices; accessibility by bus and train; public facilities; entertainment facilities; tourist facilities; safety; town centre layout; and public art.

4.56 In Leyland town centre, 30.7% of respondents stated that the centre has a better or much better choice of shops than centres of a similar size, and 33.7% indicated that the choice of shops was about the same. Accordingly, a minority (22.1% of respondents) indicated that Leyland town centre generally had a worse choice of shops than centres of a similar size. For all other questions which asked respondents to rate how Leyland town centre compares to centres of a similar size, the most common response in each case was that it was 'about the same' as the competition.

4.57 In Bamber Bridge district centre, 19.8% of the respondents stated that they considered the choice of shops to be better or much better when compared to other centres of a similar size, and 39.6% stated that the choice was worse. Looking at the choice of high street names, just 3.0% stated that the choice was better or much better than other centres, whereas 43.6% stated that the choice was worse and 9.9% said the choice was much worse. Accordingly, respondents' answers generally indicated that the shopping provision at Bamber Bridge was not as strong as that provided in similar centres. For the majority of the other questions, respondents most commonly answered that Bamber Bridge district centre performed about the same as other similarly size centres. For example, 56.4% of respondents considered the town centre environment to be about the same quality as that as that at competing centres, 51.5% considered the centre was of comparable cleanliness, and 63.4% considered the centre to have a comparable level of public information and signposting.

- 4.58 Respondents in Longton district centre were generally more positive, particularly when asked about the town centre environment (57.4% of respondents indicated that this was better or much better than similar centres) and cleanliness (70.3% indicated that the centre was cleaner or much cleaner than similar centres). Almost six out of every ten respondents (57.5%) in Longton district centre indicated that the general environment was better or much better than other centres.
- 4.59 Penwortham district centre scored relatively poorly in respect of the choice of shops (41.6% of respondents indicated that the centre was worse than similar centres in this regard) and in terms of the choice of high street retail names (50.5% of respondents stated that the choice of national multiples was worse than at other centres). In terms of car parking, 46.5% of respondents stated that Penwortham's car parking was about the same as at other similar centres, and 23.8% said that it was worse than other centres.
- 4.60 In Tardy Gate district centre, 52.0% of respondents indicated that the choice of shops was worse or much worse than at other similar centres, and 79.0% of respondents indicated that the choice of high street names was worse or much worse. Nearly three-quarters of respondents (74.0%) stated that the range of services, such as banks and other financial services, was worse or much worse than other similar centres.
- 4.61 Finally, in terms of the Capitol Centre, 23.6% of respondents indicated that the choice of shops was better or much better than similar destinations, and 34.9% of respondents stated that the choice of shops was worse. Broadly similar results were recorded when respondents were asked about the choice of high street names, with 20.8% of respondents identifying that the Capitol Centre was better or much better than similar retail destinations in this regard and 41.5% indicating that the choice of high street names was worse than comparable destinations.

Types of Shops/Services Desired

- 4.62 Respondents were asked what type of shops or services they would like to see more of in the centre. A common response for respondents at each centre was a requirement for more click and collect facilities, which featured in the top four responses provided at five of the six centres. The need for more click and collect facilities was the most popular response at Leyland town centre (identified by 41.3% of respondents), Bamber Bridge district centre (22.8%) and the Capitol Centre (24.5%). The need for more banks and large supermarkets was also frequently cited by respondents, as was the need for more high street names.

Table 4.12: Types of Shops or Services Desired by Respondents

Centre	1st		2nd		3rd	
Leyland	Click and collect facilities	41.3%	Footwear stores	13.5%	High street names	12.5%
Bamber Bridge	Click and collect facilities	22.8%	Footwear stores	17.8%	High street names & Independent/specialist shops (joint 3 rd)	6.9%
Longton	Banks	29.7%	Book shops (joint 2 nd)	5.9%	Large supermarkets & Leisure facilities (joint 2 nd)	5.9%
Penwortham	Banks	23.8%	Click and collect facilities	21.8%	Large supermarkets	20.8%
Tardy Gate	Large supermarkets	23.0%	Banks	16.0%	Butchers & Click and collect facilities (joint 3 rd)	13.0%
Capitol Centre	Click and collect facilities	24.5%	Department stores/retailers	16.0%	Tesco	14.2%

Source: NEMS In Street Survey, Question 35

Types of Leisure Facilities Desired

- 4.63 Respondents were also asked what type of leisure facilities they would like to see in each centre. Overall, there were fewer different responses to this question and a relatively high proportion of respondents failed to identify any time of leisure facility that they wished to see in the centre they were visiting.
- 4.64 The single most popular response was provided in Leyland town centre, where 11.5% of respondents stated that they would like to see a cinema. A desire to see more entertainment and activities more children was one of the top three responses at all of the defined town and district centres. The need for more restaurants and cafes was also commonly identified by respondents.

Table 4.13: Types of Leisure Facilities Desired by Respondents

Centre	1st		2nd		3rd	
Leyland	Cinema	11.5%	Entertainment/ activities for young people	8.7%	Bowling alley & Children's activity centre (joint 3 rd)	7.7%
Bamber Bridge	Entertainment/ activities for young people	7.9%	Health and fitness (joint 2 nd)	5.9%	Cinema (joint 2 nd)	5.9%
Longton	Swimming pool	8.9%	Health and fitness	6.9%	Children's activity centre & Entertainment/ activities for young people (joint 3 rd)	5.9%
Penwortham	Restaurants/cafes	8.9%	Entertainment/ activities for young people	3.0%	Health and fitness	2.0%
Tardy Gate	Children's activity centre (joint 1 st)	11.0%	Entertainment/ activities for young people (joint 1 st)	11.0%	Cinema	7.0%
Capitol Centre	Bowling alley	11.3%	Restaurants / cafes	6.6%	Swimming pool	3.8%

Source: NEMS In Street Survey, Question 36

Measures to Improve the Centre

- 4.65 In terms of identifying measures which respondents considered would help to improve the town and district centres, the most common response for Leyland, Bamber Bridge, Penwortham and Tardy Gate was to give the centre a 'general face lift'. This response was particularly popular at Penwortham district centre and was provided there by almost a third of respondents (29.7%). The need to fill empty units in the centre was also a common response, as was the need to improve the overall quality of shops.

Table 4.14: Measures to Improve the Centre

Centre	1st		2nd		3rd	
Leyland	General face lift	14.4%	Fewer low quality shops	11.5%	Fill the empty shops & Improved street paving (joint 3 rd)	9.6%
Bamber Bridge	General face lift	18.8%	Fill the empty shops	9.9%	More organised events	8.9%
Longton	Fill the empty shops	17.8%	More evening activities (joint 2 nd)	5.0%	More parking (joint 2 nd)	5.0%
Penwortham	General face lift	29.7%	Fill the empty shops	25.7%	Improve the quality of the shops & Reduce traffic congestion (joint 3 rd)	13.9%
Tardy Gate	General face lift	17.0%	Fewer low quality shops	11.0%	Improve the quality of the shops	7.0%
Capitol Centre	Accessibility by private car	15.1%	Fill the empty shops (joint 2 nd)	6.6%	General face lift (joint 2 nd)	6.6%

Source: NEMS In Street Survey, Question 37

Biggest Weakness of the Centres

- 4.66 Respondents were also asked what they considered to be the biggest weakness of each centre. A high proportion of respondents did not identify any particular weakness for the centres; this was particularly notable at Longton district centre, where almost half of respondents (48.5%) could not identify the centre’s biggest weakness.
- 4.67 Of those that did respond, the choice and range of non-food shops was commonly cited as weakness in each of the centres. In Leyland town centre, the most common response was the quantity of takeaways and charity shops (provided by 15.4% of respondents), followed by the choice and range of non-food shops (13.5%).

Table 4.15: Biggest Weakness of the Centres

Centre	1st		2nd		3rd	
Leyland	Quantity of takeaways and charity shops	15.4%	Choice/range of non-food shops	13.5%	Availability of car parking	6.7%
Bamber Bridge	Anti-social behaviour (joint 1 st)	12.9%	Choice/range of non food shops (joint 1 st)	12.9%	Lack of market facilities	6.9%
Longton	Availability of car parking &		Lack of non-retail provision	7.9%	Empty shops	6.9%
Penwortham	Choice/range of non-food shops	22.8%	Empty shops	15.8%	Lack of foodstore provision	13.9%
Tardy Gate	Quantity of takeaways/charity shops	16.0%	Lack of foodstore provision	15.0%	Choice/range of non-food shops	11.0%
Capitol Centre	Accessibility by private car	12.3%	Choice/range of non-food shops	6.6%	Accessibility by bus & Lack of public amenities	4.7%

Source: NEMS In Street Survey, Question 38

Evening Economy

- 4.68 In addition to daytime activities within the centres, respondents were also asked about the night time economy in each of the centres. Firstly, respondents were asked how often they visit the centres in the evening. The most common answer within each of the six centres was that the respondents never visit the centres in the evening, with more than half of respondents providing this answer in each of the centres.
- 4.69 In Leyland town centre, just 3.9% of respondents stated that they visit the centre in the evening once a week or more, and 9.6% stated that they visit the centre in the evening less than once a week. Bamber Bridge district centre is proportionally the most popular centre for evening visits, with 12.9% of respondents indicating that they visit the centre in the evening once a week or more.

Table 4.16: Frequency of Evening Visits

Centre	Daily	Once a week or more	Less than once a week	Less than once a fortnight	Less than once a month	Never
Leyland	1.0%	2.9%	9.6%	2.9%	11.5%	71.2%
Bamber Bridge	0.0%	12.9%	5.0%	1.0%	3.0%	78.2%
Longton	2.0%	5.0%	7.9%	4.0%	16.8%	59.4%
Penwortham	1.0%	8.9%	7.9%	5.0%	13.9%	62.4%
Tardy Gate	0.0%	11.0%	4.0%	8.0%	7.0%	70.0%
Capitol Centre	0.0%	1.9%	2.8%	3.8%	20.8%	70.8%

Source: NEMS In Street Survey, Question 28

4.70 Respondents were then asked what the main reason was for visiting the centre in the evening. In all of the centres except the Capitol Centre, the most common response was to visit a pub or a cafe/restaurant. At the Capitol Centre, the most common response was to go to the cinema (provided by 32.3% of respondents) and for evening non-food shopping (29.0%).

Leyland Town Centre Market

4.71 Question 39 of the in-street survey asked the respondents in Leyland town centre how often they visit the market. The vast majority of respondents do visit the market, with 28.8% indicating that they visit once a week or more, and a further 17.3% indicating that they visit at least once a month. Only 14.4% of visitors to Leyland town centre indicated that they never visit the market.

4.72 Respondents were then asked what they particularly like about the market. By far the two most popular answers were the friendly atmosphere (which was identified by 144% of respondents) and the freshness of the food (13.5%).

5.0 Health Check Assessments

5.01 The NPPF identifies a number of factors which will be of relevance in delivering sustainable development, with one such factor being the need to ensure the vitality and viability of town centres. Paragraph 23 of the NPPF indicates that local authorities should promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. Paragraph 23 also requires local planning authorities to recognise that town centres are at the heart of their communities and to pursue policies that support their viability and vitality. It also states that competitive town centre environments should be promoted in order to enhance customer choice, provide a diverse retail offer and in order to reflect the individuality of town centres.

5.02 The criteria by which the health of a centre can be judged is set out in the Government's Ensuring the Vitality of Town Centres Planning Practice Guidance of March 2014. Indicators which should be monitored on a regular basis in order to judge the health of a centre and its performance over time include the following.

- **Diversity of uses** – Data on the diversity of uses in the centres was collated during our surveys in October 2016.
- **Proportion of vacant street level property** – Vacant properties were identified during the undertaking of the surveys.
- **Customers' views and behaviour** – Analysis of customers' views in respect of the defined centres within South Ribble.
- **Retailer representation** – Information on the performance of centres and the current strength of retailer representation has been derived from Venuescore's 2015-16 UK Shopping Venue Rankings.
- **Commercial rents** – Zone A rental data has historically been derived from Estates Gazette Interactive (EGi) data, which is a widely recognised source of such information. However, EGi has discontinued its reporting of such data and we have been unable to establish an alternative, reliable published source of such data.
- **Pedestrian flows** – General footfall and pedestrian flows were observed during the undertaking of the centre surveys.
- **Accessibility** – Consideration of access to and around each centre is informed by our site visits to each centre.
- **State of town centre environmental quality** – Consideration of the quality of the buildings and public realm in each of the centres has also been informed by our observations when undertaking field work.

- 5.03 We set out below a summary of our analysis of Leyland town centre and the four district centres in respect of the above indicators. In addition to the defined centres, we have provided a review of the vitality and viability indicators of the Capitol Centre, as required by the Council's Quotation for Retail Consultancy brief. However, the Capitol Centre is not a designated centre as defined by the adopted South Ribble Local Plan.
- 5.04 We provide a full, detailed assessment of the health of these centres at Appendix 4.
- 5.05 We commence our assessment by considering the role of South Ribble's centres in the sub-regional shopping hierarchy as identified Venuescore's 2015-2016 UK Shopping Venue Rankings.

Defining Types of Sub-Regional Retail Hierarchy

- 5.06 Table 5.1 illustrates the position of the sub-region's principal centres based on Venuescore's Rankings. Venuescore's index ranks 2,705 retail venues within the UK (including city, town and district centres, stand-alone malls, retail warehouse parks and factory outlet centres), based on the strength of their current retail and food and drink provision. Towns and major shopping centres are rated using a scoring system which takes account of the presence in each location of multiple retailers – including anchor stores, fashion operators and non-fashion multiples.
- 5.07 Venuescore allocates each centre to a tier, reflecting its role and function. The eight tiers comprise (highest to lowest): 'Major City', 'Major Regional', 'Regional', 'Sub-Regional', 'Major District', 'District', 'Minor District' and 'Local'. The rankings in the table represent the position of the centres as identified by the 2015-16 Rankings, as well as competing surrounding shopping venues.
- 5.08 The table shows that Leyland town centre, as well as some nearby centres such as Preston, Bolton and Blackburn, have fallen in the Venuescore rankings since 2014. The Venuescore rankings suggest that there has been a gradual decline in the performance of North West 'regional' centres over the last few years.

Table 5.1: Venuescore’s Sub-Regional Shopping Hierarchy

Venue	Score 2014-15	Local Authority	Location Grade 2014-15	2015-16 Rank	2014-15 Rank	2013-14 Rank	Change in Rank (13-16)
Manchester city centre	766	Manchester	Major City	2	2	2	0
Liverpool city centre	551	Liverpool	Major City	5	5	4	-1
Preston city centre	238	Preston	Major Regional	56	52	41	-15
Blackpool town centre	214	Blackpool	Regional	74	83	69	-5
Southport town centre	188	Sefton	Regional	100	96	102	+2
Wigan town centre	184	Wigan	Regional	109	108	91	-18
Bolton town centre	183	Bolton	Regional	112	98	65	-47
Blackburn town centre	158	Blackburn	Regional	147	142	178	+31
Chorley town centre	95	Chorley	Sub-Regional	278	318	290	+12
Capitol Park, Preston	35	South Ribble	District	918	824	1623	+705
Bamber Bridge town centre	22	South Ribble	Minor District	1429	1468	976	-453
Leyland town centre	18	South Ribble	Local	1709	1680	936	-773
Leyland, Towngate	18	South Ribble	Local	1709	1792	-	-
Leyland, Olympian Way	16	South Ribble	Local	1908	2010	-	-
Preston, Station Road	15	South Ribble	Local	2034	2010	-	-
Leyland, Churchill Way retail park	11	South Ribble	Local	2827	2557	-	-

Source: Venuescore 2015-16, 2014-15 and 2013-14 UK Shopping Venue Rankings (Javelin Group)

Leyland Town Centre Health Check Assessment

5.09 Leyland town centre is the principal retail, commercial and administrative centre in the Borough as defined by the adopted Local Plan. A full assessment of Leyland town centre can be found at Appendix 4.

Diversity of Uses

5.10 Based on the boundary defined by Experian Goad, Leyland town centre had 210 retail and service units in October 2016. This represents a decrease in the number of units from the 225 units recorded by the Central Lancashire Retail Study, which reported in 2010. However, we do not believe that it is possible to make a direct comparison with the 2010 data due to the application of a different methodology in the 2010 previous study which may have included ‘other main town centre uses’ within retail and service uses. Notwithstanding this, it is clear there has been no significant physical development resulting in any substantial increase in retail floorspace within the Goad boundary since 2010.

5.11 The 210 retail and service units recorded in October 2016 provide 41,332 sq.m of gross

floorspace, based on Experian Goad data.

Table 5.2: Leyland Town Centre Diversity of Use for Commercial Units

Category	Number	%	UK ¹
Convenience	22	10.5%	8.7%
Comparison	60	28.6%	31.8%
Retail Service	43	20.5%	14.0%
Leisure Service	50	23.8%	23.5%
Financial and Business Service	26	12.4%	10.6%
Vacant	9	4.3%	11.2%
Total	210	100%	100%

Source: WYG survey, October 2016

¹ UK average from the Experian Goad Category Report, August 2016

Table 5.3: Leyland Town Centre Diversity of Use for Commercial Floorspace

Category	Floorspace (sq.m)	%	UK ¹
Convenience	15,610	37.7%	15.2%
Comparison	8,737	21.2%	35.8%
Retail Service	3,240	7.6%	6.7%
Leisure Service	10,065	24.3%	24.5%
Financial and Business Service	2,990	7.2%	8.0%
Vacant	690	1.7%	9.0%
Total	41,332	100%	100%

Source: WYG survey, October 2016

¹ UK average from the Experian Goad Category Report, August 2016

5.12 There are currently 22 convenience units in Leyland town centre which occupy a total gross floorspace of 15,610 sq.m. The convenience goods units comprise 10.5% of the town's total number of units, which is 1.8 percentage points greater than the national average 8.7%. The 22 convenience units represent 15,610 sq.m of gross floorspace and equate to 37.8% of the total retail and service floorspace in Leyland, a figure significantly greater than the national average of 15.2%.

5.13 The significant provision of convenience goods floorspace is due to the four largest retail and service units within Leyland (excluding Leyland Leisure Centre) being occupied by convenience operators. These four operators are: Tesco Extra (8,620 sq.m gross), Asda (1,740 sq.m gross), Lidl (1,330 sq.m gross), and Aldi (1,310 sq.m gross). Other notable units include Leyland Market (860 sq.m gross). Although markets are classified by Experian Goad as a convenience goods use, it is acknowledged that the Leyland Market has a variety of stalls that

also provide comparison goods and services.

- 5.14 Our survey recorded 60 comparison goods units which collectively occupy 8,737 sq.m of gross floorspace. The comparison goods units account for 28.6% of the town centre's total number of units, which is 3.2 percentage points below the national average of 31.8%. The proportion of commercial floorspace in comparison goods use, at 21.1%, is significantly lower than the national average of 35.8%. The largest comparison goods unit is Poundstretcher (800 sq.m gross), which is located within the Churchill Way Retail Park at the north of the town centre. The Churchill Way Retail Park also includes comparison goods retailers, including B&M Bargains (610 sq.m gross) and Brantano (540 sq.m gross).
- 5.15 Leyland town centre has a good representation in terms of retail service units. There are 43 units which equates to 20.5% of the total stock of commercial units; this is 6.5 percentage points higher than the national average of 14.0%. Leyland's retail service units are generally small format with 42 of the units being between 10 sq.m and 150 sq.m. The total retail service floorspace is 3,240 sq.m, which equates to 7.8% of the total retail and service floorspace in Leyland. This is 1.1 percentage points greater than the national average figure of 6.7% of commercial floorspace being in retail service use.
- 5.16 Leyland's leisure service occupies a sizeable part of the town centre floorspace. Our survey recorded 50 leisure service units within the centre which account for 23.8% of the total number of units, which is similar to the national average of 23.5%. In respect of the provision of leisure service floorspace, the proportion of floorspace in this use (24.4%) is also similar to the national average figure (24.5%).
- 5.17 The financial and business service offer in Leyland comprises 26 units, which equates to 12.4% of the commercial stock; this is 1.8 percentage points above the national average of 10.6%. In terms of its financial and business service floorspace, the town centre accommodates 2,990 sq.m of floorspace, which comprises 7.2% of the total stock. This is slightly lower than the national average of 8.0% and can be attributed to financial and business service uses generally accommodating small units in Leyland.
- 5.18 At the time of our survey, we identified nine vacant units present within the town centre. This equates to 4.3% of the total units, which is significantly lower than the national average figure of 11.2%. Furthermore, the nine vacant units are generally of a small format (collectively totalling 690 sq.m) and equate to 1.7% of the total floorspace present in Leyland. Again, this is significantly lower than the national average of 9.0% of floorspace being vacant.

Retailer Representation

- 5.19 Leyland has relatively poor representation from national multiple retailers, with only 11 of the 60 comparison units occupied by retailers with a national presence. Out of the 11 units, four are charity shops (Age Concern, Mind, Age UK and Sue Ryder) and a further three are discount stores (B&M, Poundstretcher and Savers). The remaining four at the time of our survey were: Boots the Chemist, Brantano footwear¹⁷, Card Factory and Hallmark (the latter two of which are card stores). None of these retailers are included in the top national retailers list provided by Experian Goad (it should be noted that Experian Goad's list includes a large number of fashion retailers of a type which would not ordinarily require representation in a centre the size of Leyland).
- 5.20 Leyland town centre is, however, well represented by national multiple convenience goods retailers, operators including Tesco, Asda, Aldi and Lidl.
- 5.21 Notwithstanding this, there is a lack of larger format units that are suitable for the needs of national multiples, excluding the four supermarkets and other units on the Churchill Way Retail Park. This can be attributed to the low proportion of vacant service floorspace and due to many units in Leyland being of a relatively modest size. Whilst it has been identified that there is a relatively modest comparison goods offer, as well as limited representation from national multiple retailers, the low vacancy rates in respect of both the number of units and the proportion of floorspace indicates that Leyland is a viable centre that accommodates a range of locally based independent retailers.

Pedestrian Flows

- 5.22 At the time of WYG's visit to the centre in October 2016, footfall was observed to be healthy on the principal streets of the town centre, particularly along Hough Lane which forms the existing primary shopping area. Increased pockets of activity were also present around Tesco Extra in the south of the centre and along Chapel Brow to the north.

Accessibility

- 5.23 Leyland is well connected within the national strategic highway network, with the M6 motorway running along the eastern boundary of the settlement. Junction 28 of the M6 is located approximately 1 kilometre from the town centre and can be accessed via the B5254/B5256 (Leyland Way). Chorley town centre is located approximately 8.5 kilometres to

¹⁷ The Brantano store is the subject of a closing down sale at the time of reporting in April 2017

the south-east of Leyland, and Preston city centre is located approximately 11 kilometres to the north. Both Chorley and Preston can be accessed via the A6.

- 5.24 There are five car parks within Leyland which are owned and operated by South Ribble Borough Council. These are King Street (which provides 145 spaces), Ecroyd Street (65 spaces), Leyland Station (60 spaces), Churchill Way (50 spaces) and Sumner Street (39 spaces). The Leyland Station car park is located outside of the town centre at the railway station. The Ecroyd Street car park serves the market and the Churchill Way car park serves the Churchill Way retail park, although both operate as public car parks.
- 5.25 Leyland railway station is located approximately 100 metres to the north-east of the town centre boundary, and is well connected to the town centre for both vehicles and pedestrians via Station Brow. The station is located on the West Coast Mine Line and currently comprises four platforms. There is no bus station located within Leyland town centre, although there are consistent number of bus stops present throughout and overall the centre is considered to be well served by bus. There are currently 25 local bus services running from Leyland, which cover in excess of 50 local destinations.

Perception of Safety

- 5.26 We consider Leyland town centre to generally feel safe and secure. The main shopping areas had relatively high levels of pedestrian activity at the time of our survey and, for the most part, have active retail frontages that provide natural surveillance within the streets, reducing opportunities for crime to be committed. This is most notably the case along Hough Lane, within the currently defined primary shopping area. A number of retail frontages on Hough Lane also include private CCTV systems which further increase the levels of surveillance present within the primary shopping area. There are also some Council operated CCTV systems visible within the town centre.

Town Centre Environmental Quality

- 5.27 We found the environmental quality in Leyland to be generally good. Efforts have clearly been made along Hough Lane to improve the environmental quality and provide attractive public realm features. There are planters located at regular intervals along the street which accommodate seasonal planting schemes. Whilst this is an attractive feature within the town centre, there are a number of instances where vandalism has occurred which requires maintenance. There are a number of trees present along Hough Lane which add further

greenery to the street scene. The trees are also set within planters which generally appear to be well maintained.

- 5.28 Key features of Leyland town centre are the sculptures which were installed as part of a regeneration project in 2011 and which celebrate Leyland's manufacturing heritage. Most notable is the statue of a Leyland Motors worker leaving the former North Works site, which is now Leyland Market on Hough Lane. Other elements in this regeneration scheme include the restoration of the Leyland clock on Churchill Way, the siting of a Leyland-built Centurion tank off Flensburg Way, and new benches, flower boxes and street lighting on Hough Lane. This project is considered to have had a considerable beneficial impact on the town centre's environmental quality.
- 5.29 Overall, the state of the town centre environmental quality is considered to be good. However, there may be potential to make improvements along Towngate in order to make a better connection between Tesco Extra and Hough Lane.

District Centre Health Check Assessments

- 5.30 Beneath Leyland town centre in hierarchy of the centres within the Local Plan are a range of smaller centres that perform different roles. This ensures that residents' day to day retail, service and civic needs are provided for in accessible locations.
- 5.31 The retail hierarchy is currently defined within Policy E3 (Leyland Town Centre), Policy E4 (District Centres) and Policy E5 (Local Centres) of the Local Plan. The supplied Quotation for Retail Consultancy required health checks to be undertaken for Leyland town centre, the four district centres (Bamber Bridge, Longton, Penwortham and Tardy Gate) and the Capitol Centre; as a consequence, we do not consider the vitality and viability of local centres in this report.

Bamber Bridge District Centre

- 5.32 Bamber Bridge is defined as a district centre in the Local Plan. It is located approximately 6 kilometres north of Leyland town centre and is accessed via Junction 29 of the M6 to the south, as well as via local highway routes.
- 5.33 The existing district centre boundary currently contains 43 retail and service units, which comprise 8,138 sq.m of retail and service floorspace. A full health check of Bamber Bridge district centre is included at Appendix 4.

5.34 Tables 5.4 and 5.5 below set out the diversity of uses in Bamber Bridge district centre.

Table 5.4: Bamber Bridge District Centre Diversity of Use for Commercial Units

Category	Number	%	UK ¹
Convenience	8	18.6%	8.7%
Comparison	11	25.6%	31.8%
Retail Service	8	18.6%	14.0%
Leisure Service	7	16.3%	23.5%
Financial and Business Service	5	11.6%	10.6%
Vacant	4	9.3%	11.2%
Total	43	100%	100%

Source: WYG survey, October 2016

¹ UK average from the Experian Goad Category Report, August 2016

Table 5.5: Bamber Bridge District Centre Diversity of Use for Commercial Floorspace

Category	Floorspace (sq.m)	%	UK ¹
Convenience	2,601	32.0%	15.2%
Comparison	2,743	33.7%	35.8%
Retail Service	704	8.7%	6.7%
Leisure Service	940	11.6%	24.5%
Financial and Business Service	784	9.6%	8.0%
Vacant	366	4.5%	9.0%
Total	8,138	100%	100%

Source: WYG survey, October 2016

¹ UK average from the Experian Goad Category Report, August 2016

5.35 Bamber Bridge currently contains eight convenience goods units (totalling 2,601 sq.m gross), which equate to 18.6% of the total retail and service units and 32.0% of the total retail and service floorspace. This is considerably greater than the national average figures, which indicate that 8.7% of units and 15.2% of floorspace is in convenience goods use. The high proportion of convenience floorspace can be attributed to the Morrisons supermarket, which comprises 2,142 sq.m (gross) and is the largest unit within the centre.

5.36 There are 11 comparison goods units in Bamber Bridge which represent 25.6% of the total retail and service units; this is 6.2 percentage points lower than the national average of 31.8%. Comparison goods units comprise 2,743 sq.m of gross floorspace, which equates to 33.7% of the total stock of retail and service floorspace. This is 1.9 percentage points lower than the national average of 35.8%. The proportion of comparison goods floorspace is

significantly boosted by the Scartop Furniture Store on Station Road, which has a gross floorspace of 1,325 sq.m and is the second largest unit in Bamber Bridge.

- 5.37 The eight retail service units comprise 18.6% of the total stock of commercial units and provide a total of 704 sq.m (gross) floorspace, which is 8.7% of the total retail and service floorspace. The proportion of retail service units is 4.6 percentage points greater than the national average of 14.0%, and the proportion of floorspace is 2.0 percentage points greater than the national average of 6.7%.
- 5.38 There are seven leisure service units which equate to 16.3% of the total retail and service units. This is significantly lower than the national average figure of 23.5% of commercial units being in leisure service use. The leisure service units comprise a total gross floorspace of 940 sq.m, which equates to 11.6% of total floorspace. This is also significantly lower than the national average of 24.5%.
- 5.39 In terms of financial and business services, there are five units which represent 11.6% of the total retail and service units in Bamber Bridge. This is 1.0 percentage point greater than the national average of 10.6%. The financial and business service units comprise 784 sq.m gross floorspace; this represents 9.6% of total retail and service floorspace, which is 1.6 percentage points greater than the national average of 8.0%.
- 5.40 Our survey of October 2016 identified four vacant units in Bamber Bridge district centre. This represents 9.3% of the total units in the centre and is 1.9 percentage points lower than the national average of 11.2% for vacant units within designated retail centres. The vacant units are all small format and provide a total of 366 sq.m of gross floorspace. This equates to just 4.5% of the floorspace, which is significantly below the national average figure of 9.0%.
- 5.41 Overall, Bamber Bridge accommodates a relatively good range of uses. There is a significant number of retail and service units that are located outside of the existing district centre boundary.
- 5.42 Bamber Bridge has relatively good accessibility and free car parking is available both on-street and in the Morrisons and Kingsway car parks. The centre also has a reasonable environmental quality and public realm works are currently being undertaken to improve this further.
- 5.43 Overall, we consider Bamber Bridge to have facilities consistent with a district centre designation in the context of the network of centres in the authority area. There is

representation across all of the retail and service sectors. However, whilst the centre currently has a particularly strong convenience goods offer, there is a significant underprovision of leisure services. The district centre is currently subject of a low vacancy rate, both in respect of the number of units and the proportion of floorspace.

Longton District Centre

- 5.44 Longton is defined as a district centre in the Local Plan. It is located approximately 8.5 kilometres south-west of Preston city centre and approximately 9.5 kilometres north-west of Leyland town centre.
- 5.45 There are currently 19 retail and service units located within the existing district centre boundary, which comprise a total gross floorspace of 3,570 sq.m.
- 5.46 Tables 5.6 and 5.7 below set out the diversity of uses in Longton district centre.

Table 5.6: Longton District Centre Diversity of Use for Commercial Units

Category	Number	%	UK ¹
Convenience	2	10.5%	8.7%
Comparison	3	15.8%	31.8%
Retail Service	6	31.6%	14.0%
Leisure Service	3	15.8%	23.5%
Financial and Business Service	2	10.5%	10.6%
Vacant	3	15.8%	11.2%
Total	19	100%	100%

Source: WYG survey, October 2016

¹ UK average from the Experian Goad Category Report, August 2016

Table 5.7 Longton District Centre Diversity of Use for Commercial Floorspace

Category	Floorspace (sq.m)	%	UK ¹
Convenience	2,120	59.4%	15.2%
Comparison	318	8.9%	35.8%
Retail Service	449	12.6%	6.7%
Leisure Service	307	8.6%	24.5%
Financial and Business Service	167	4.7%	8.0%
Vacant	209	5.9%	9.0%
Total	3,570	100%	100%

Source: WYG survey, October 2016

¹ UK average from the Experian Goad Category Report, August 2016

- 5.47 Longton currently contains two convenience goods units (totalling 2,120 sq.m gross), which equate to 10.5% of the total retail and service units and 59.4% of the total retail and service floorspace. The proportion of units in convenience goods use is slightly greater than the national average of 8.7%; however, the provision of convenience goods floorspace is considerably greater than the national average of 15.2%. This can be attributed to the presence of Booths Supermarket, which anchors the centre and which comprises 1,992 sq.m (gross).
- 5.48 There are three comparison goods units in Longton. These units represent 15.8% of the total retail and service units, which is 16.0 percentage points lower than the national average of 31.8%. Comparison goods units comprise 318 sq.m of gross floorspace, which equates to 8.9% of the total stock of retail and service units. This is very substantially (26.9 percentage points) lower than the national average of 35.8%. There is therefore a significant under-representation from the comparison goods sector, although this is to be expected in a district centre the size of Longton.
- 5.49 There are six retail service units, which comprise 31.6% of the total retail and service units and provide a total of 449 sq.m (gross) floorspace, which equates to 12.6% of overall floorspace. The proportion of units in retail service use is 17.6 percentage points greater than the national average figure of 14.0%, and the proportion of floorspace in such use is 5.9 percentage points greater than the national average of 6.7%. Overall, Longton is considered to have a relatively strong retail service offer for a centre of its size.
- 5.50 There are three leisure service units in Longton, which represent 15.8% of the total number of retail and service units and provide a total of 307 sq.m (gross) floorspace. This represents 8.6% of the total retail and service floorspace in Longton. The proportion of units in leisure service use is 7.7 percentage points lower than the national average of 23.5%, and the proportion of floorspace is 15.9 percentage points lower than the national average of 24.5%.
- 5.51 Longton has two financial and business service units, which comprise 10.5% of the total units and 4.7% of the total floorspace (providing a total of 167 sq.m gross). The number of units is broadly consistent with the national average of 10.6%, whilst the proportion of floorspace is below the national average of 8.0%.
- 5.52 Our survey of October 2016 identified three vacant units in Longton district centre. This represents 15.8% of the total units in the centre and is 4.6 percentage points greater than the

South Ribble Retail and Leisure Study

national average of 11.2% for vacant units within designated retail centres. However, given the limited number of units in Longton district centre, it is evident that the re-occupation of just one of these units would have a significant beneficial impact on the vacancy rate.

- 5.53 Overall, Longton is considered to have a relatively good diversity of uses for a centre of its size, offering a range of services suitable to meet the day to day needs of local residents. The Booths supermarket is also likely to attract visitors to the centre from outside of the immediate locality of Longton.
- 5.54 Public realm improvements which were delivered in 2012 have made a considerable improvement to the centre, with the high environmental quality creating an attractive and welcoming shopping environment. Longton also has reasonably good accessibility and a good provision of free car parking.

Penwortham District Centre

- 5.55 Penwortham is a defined district centre in the Local Plan. It is located approximately 4 kilometres south-west of Preston city centre and 9.5 kilometres north of Leyland town centre. The district centre is located on the principal highway route through the town, this being Liverpool Road (A59) which runs directly to Preston city centre. Leyland town centre can also be accessed to the south via the A59/A582.
- 5.56 There are currently 72 retail and service units located within the existing district centre boundary, which provide a total gross floorspace of 6,250 sq.m.
- 5.57 Tables 5.8 and 5.9 below set out the diversity of uses in Penwortham district centre.

Table 5.8: Penwortham District Centre Diversity of Use for Commercial Units

Category	No.	%	UK ¹
Convenience	5	6.9%	8.7%
Comparison	22	30.6%	31.8%
Retail Service	13	18.1%	14.0%
Leisure Service	14	19.4%	23.5%
Financial and Business Service	12	16.7%	10.6%
Vacant	6	8.3%	11.2%
Total	72	100%	100%

Source: WYG survey, October 2016

¹UK average from the Experian Goad Category Report, August 2016

Table 5.9 Penwortham District Centre Diversity of Use for Commercial Floorspace

Category	No.	%	UK ¹
Convenience	720	11.5%	15.2%
Comparison	1,700	27.2%	35.8%
Retail Service	750	12.0%	6.7%
Leisure Service	1,430	22.9%	24.5%
Financial and Business Service	770	12.3%	8.0%
Vacant	880	14.1%	9.0%
Total	6,250	100%	100%

Source: WYG survey, October 2016

¹ UK average from the Experian Goad Category Report, August 2016

- 5.58 Penwortham currently contains five convenience goods units (totalling 720 sq.m gross), which equate to 6.9% of the total retail and service units and 11.5% of the total retail and service floorspace. The number of units and proportion of floorspace are both below the national averages of 8.7% for number of convenience units and 11.5% for proportion of convenience floor space. There is a notable lack of a large-format convenience goods store within Penwortham district centre, particularly given the size of the centre.
- 5.59 In respect of comparison goods, there are 22 units, comprising 30.6% of the total units in Penwortham. This is broadly consistent with the national average figure of 31.8%. In contrast, the proportion of comparison goods floorspace equates to 1,700 sq.m (gross), which represents 27.2% of the total retail and service floorspace, which is 8.6 percentage points lower than the national average of 35.8%. This can be attributed to the high proportion of small format comparison goods units in the centre, with only four of the 22 units being 100 sq.m (gross) or greater in size.
- 5.60 There are 13 retail service units in Penwortham, which represent 18.1% of the total retail and service units and 12.0% of the total retail and service floorspace (providing a total floorspace of 750 sq.m gross). This is significantly greater than the national average figure of 14.0% of commercial floorspace being in retail service use and 6.7% of the total stock of floorspace being in this use.
- 5.61 Penwortham has 14 leisure service units, which represent 19.4% of the total retail and service units and equate to 22.9% of the total retail and service floorspace (providing a total of 1,430 sq.m gross floorspace). The proportion of units in leisure service use is 4.1 percentage points lower than the national average of 23.5%, and the proportion of floorspace in this use is 15.9 percentage points lower than the national average of 24.5%.

- 5.62 There are 12 financial and business service units in Penwortham, which represent 16.7% of the total retail and service units. This is 6.1 percentage points greater than the national average of 10.6% of units being in financial and business service use. Financial and business service units provide a total of 770 sq.m gross floorspace, which is 12.3% of the total stock of floorspace in Penwortham.
- 5.63 Our October 2016 survey identified six vacant units in Penwortham district centre. The units represent 8.3% of the total number of retail and service units in the centre, which is below the national average figure of 11.2%. In respect of floorspace, the six units provide a total of 880 sq.m (gross), which represents 14.1% of the total stock of retail and service floorspace. This is 5.1 percentage points greater than the national average of 9.0%.
- 5.64 Overall, Penwortham is considered to have a relatively limited convenience goods retail offer for a centre of its size. However, we note that there has been longstanding interest in developing the site formerly occupied by Government offices at Cop Lane for a foodstore and that Tesco has very recently submitted an application which provides for its redevelopment. Accordingly, this proposal (subject to it being acceptable in planning policy terms) may have some potential to improve the local choice in respect of convenience goods retailers.
- 5.65 Notwithstanding the above, Penwortham district centre offers a reasonable level of service provision consistent with what we would expect in a centre of its size, which ensures that it is able to meet many of the day to day needs of local residents.
- 5.66 Penwortham has relatively good accessibility with a council-operated free car parking available, and has other informal on-street (restricted) and off-street (unrestricted) parking provision within the centre. In our view, the centre currently has a moderate environmental quality and would benefit from additional work to improve the public realm.

Tardy Gate District Centre

- 5.67 Tardy Gate is a defined district centre in the Local Plan. It is located approximately 5 kilometres south of Preston city centre and 4 kilometres north of Leyland town centre. The centre is located on the B5254 Watkin Lane/Leyland Road.
- 5.68 There are currently 41 retail and service units located within the existing district centre boundary, which comprise a total gross floorspace of 3,475 sq.m.

5.69 Tables 5.10 and 5.11 below set out the diversity of uses in Tardy Gate district centre.

Table 5.10: Tardy Gate District Centre Diversity of Use for Commercial Units

Category	No.	%	UK ¹
Convenience	4	9.8%	8.7%
Comparison	13	31.7%	31.8%
Retail Service	10	24.4%	14.0%
Leisure Service	9	22.0%	23.5%
Financial and Business Service	2	4.9%	10.6%
Vacant	3	7.3%	11.2%
Total	41	100%	100%

Source: WYG survey, October 2016

¹ UK average from the Experian Goad Category Report, August 2016

Table 5.11 Tardy Gate District Centre Diversity of Use for Commercial Floorspace

Category	No.	%	UK ¹
Convenience	536	15.4%	15.2%
Comparison	959	27.6%	35.8%
Retail Service	740	21.3%	6.7%
Leisure Service	814	23.4%	24.5%
Financial and Business Service	240	6.9%	8.0%
Vacant	186	5.4%	9.0%
Total	3,475	100%	100%

Source: WYG survey, October 2016

¹ UK average from the Experian Goad Category Report, August 2016

5.70 Tardy Gate currently contains four convenience goods units (totalling 536 sq.m gross), which equates to 9.8% of the total retail and service units and 15.4% of the total retail and service floorspace. This is broadly consistent with the national average of 8.7% of commercial units being in convenience goods use and 15.2% of floorspace being in such use.

5.71 There are 13 comparison goods units in the centre, which comprise 31.7% of the total number of commercial units. This is consistent with the national average figure of 31.8%. The comparison floorspace equates to 959 sq.m (gross) which is 27.6% of the total retail and service floorspace, and 8.2 percentage points lower than the national average of 35.8% for comparison goods floorspace. This can be attributed to the majority of the comparison units being small-format, less than 100 sq.m (gross) in size.

5.72 Tardy Gate has a strong provision of retail services. There are ten units, which equates to 24.4% of the total stock of retail and service units. This is 10.4 percentage points higher than

the national average of 14.0%. Retail service floorspace totals 740 sq.m (gross), which represents 21.3% of overall floorspace. This is significantly higher than the national average figure of 6.7%.

- 5.73 In respect of leisure services, there are nine units (equating to 22.0% of the total number of units), which provide a total gross floorspace of 814 sq.m (equating to 23.4% of the total floorspace). This is broadly consistent with the respective national average of 23.5% of commercial units being in leisure service use, and 24.5% of total floorspace being in this use.
- 5.74 There are two financial and business service units, which represent 4.9% of the total number of units and which collectively provide a gross floorspace of 240 sq.m (equating to 6.9% of overall floorspace).
- 5.75 Our survey of October 2016 identified three vacant units in Tardy Gate. This represents 7.3% of the total retail and service units in the centre and is 3.9 percentage points lower than the national average figure of 11.2%. In terms of floorspace, the three units provide a total of 186 sq.m gross floorspace, which represents just 5.4% of the total stock of retail and service floorspace. This is 3.6 percentage points below the national average figure of 9.0%.
- 5.76 Overall, Tardy Gate district centre is considered to have a good diversity of use for a district centre of its size. The centre benefits from a pedestrianised shopping area, which sits between Jubilee Road and Watkin Lane, and most retail and service units are concentrated within this area.
- 5.77 Tardy Gate is considered to offer a reasonable provision of services consistent with our expectations for a centre of its size. The number of units in convenience and comparison goods use is also broadly consistent with national average levels. Tardy Gate has a particularly strong provision of retail service units in respect of both the number of units and quantity of floorspace. The district centre also benefits from a low vacancy rate.
- 5.78 The centre is accessible to those arriving by private vehicle and by bus, and the presence of Lostock Hall railway station significantly enhances the centre's overall accessibility. The centre is generally well maintained, but would benefit from some improvements to the current public realm offer. The centre's proximity to nearby residential dwellings promotes sustainable travel and helps facilities meet the day to day needs of local residents.

The Capitol Centre Health Check Assessment

- 5.79 The Capitol Centre is an out-of-centre retail park in the north-east of the South Ribble authority area, located immediately south of the River Ribble. The Capitol Centre is not a designated centre within the retail hierarchy as defined by the adopted Local Plan.
- 5.80 There are currently 20 retail and service units located within the Capitol Centre, with some further retail uses to the rear within the Capitol Trade Park.
- 5.81 Tables 5.12 and 5.13 below set out the diversity of uses at the Capitol Centre.

Table 5.12: Capitol Centre Diversity of Use for Commercial Units

Category	No.	%	UK ¹
Convenience	1	5.0%	8.7%
Comparison	11	55.0%	31.8%
Retail Service	0	0.0%	14.0%
Leisure Service	7	35.0%	23.5%
Financial and Business Service	0	0.0%	10.6%
Vacant	1	5.0%	11.2%
Total	20	100%	100%

Source: WYG survey, October 2016

¹ UK average from the Experian Goad Category Report, August 2016

Table 5.13: Capitol Centre Diversity of Use for Commercial Floorspace

Category	No.	%	UK ¹
Convenience	3,970	14.6%	15.2%
Comparison	12,842	47.2%	35.8%
Retail Service	0	0.0%	6.7%
Leisure Service	6,892	25.3%	24.5%
Financial and Business Service	0	0.0%	8.0%
Vacant	3,494	12.8%	9.0%
Total	27,198	100%	100%

Source: WYG survey, October 2016

¹ UK average from the Experian Goad Category Report, August 2016

- 5.82 The Capitol Centre currently contains one convenience goods unit occupied by Waitrose, which is the largest unit, measuring 3,970 sq.m (gross).
- 5.83 The majority of units at the Capitol Centre are occupied by comparison goods retailers and the centre benefits from open A1 non-food consent. There are 11 comparison goods units, which comprise 55.0% of the total number of units and 47.2% of the total retail and service

floorspace (providing a total comparison goods floorspace of 12,842 sq.m gross). In respect of the number of units, the comparison goods offer is significantly higher than the national average of 31.8%, which is unsurprising given the format of the retail park and its role. Similarly, the proportion of floorspace in comparison goods use is 11.4 percentage points than the national average of 35.8%.

- 5.84 There are seven leisure service units accommodated at the Capitol Centre, which represent 35.0% of the total stock of retail and service units and account for 25.3% of the total retail and service floorspace (3,494 sq.m of gross floorspace is in leisure service use). In terms of the number of units, this is 11.5 percentage points greater than the national average of 23.5%. The provision of leisure service floorspace is, however, broadly consistent with the national average of 24.4%.
- 5.85 In terms of retail services and financial and business services, there are no units currently present at the Capitol Centre.
- 5.86 There was one vacant unit at the Capitol Centre at the time of our survey this being the former Tesco Homeplus unit, which was closed in 2015 when Tesco made the decision to close all six remaining stores of this format.
- 5.87 Overall, the Capitol Centre is considered to provide an important out-of-centre retail destination within the South Ribble authority area. Whilst subject to competition from the nearby Deepdale shopping centre, as well as from Preston city centre, the Capitol Centre provides a national multiple retail offer that is largely absent from town and district centres in South Ribble (which generally have relatively poor representation from national multiple retailers). The Centre benefits from a low vacancy rate, with just one unit empty at the time of our survey. However, we understand that discussions are ongoing to reoccupy the unit, with the letting agent confident of a positive outcome.

6.0 Population and Expenditure

6.01 This section of the report considers the population and available expenditure (for both convenience and comparison goods expenditure) across the Study Area.

Study Area Population

6.02 The population within each Study Area zone at 2017 and each of the subsequent forecast years has been sourced from Experian Micromarketer G3 data (which was issued in October 2016). Experian data provides population estimates from 2015 which accord with the findings of the 2011 Census release. Experian's methodology is based on a 'demographic component model' which takes into consideration its current age and gender estimates and the Government's population projections. Future population projections reflect assumed birth and death rates, and net migration.

6.03 Table 6.1 below sets out Experian's population projections for each zone in the Study Area for 2017 and reporting years 2019, 2022, 2024, 2029 and 2034.

Table 6.1: Study Area Population by Survey Zone (2017 to 2034)

Zone	2017	2019	2022	2024	2029	2034
1	36,218	36,545	37,044	37,349	37,907	38,444
2	35,993	36,364	36,887	37,204	37,820	38,342
3	22,289	22,454	22,636	22,759	22,990	23,226
4	14,800	14,873	15,031	15,082	15,205	15,299
5	12,832	12,906	13,011	13,040	13,110	13,158
6	29,286	29,831	30,616	31,031	31,959	32,867
7	25,037	25,207	25,483	25,664	26,038	26,295
8	39,066	39,186	39,334	39,456	39,774	40,130
Total	215,521	217,366	220,042	221,585	224,803	227,761

Source: Experian Micromarketer G3 October 2016 data release

6.04 The above table indicates that Experian forecasts that the Study Area population will increase from 215,521 at 2017 to 227,761 at 2034. This equates to an estimated population increase of 12,240 persons over the 17 year period (equating to an average of 720 persons per annum).

Retail Expenditure

6.05 In order to calculate per capita convenience and comparison goods expenditure, we have again utilised Experian Micromarketer G3 data which provides detailed information on local

consumer expenditure which takes into consideration the socio-economic characteristics of the local population. Experian is a widely accepted source of expenditure and population data and is regularly used by retail planning consultants in calculating retail capacity.

6.06 Experian provides base expenditure data at 2015. Per capita annual expenditure growth forecasts are derived from Experian Retail Planner Briefing Note 14 (published in November 2016). Figure 6 of Appendix 3 of the Retail Planner Briefing Note identifies the following annual growth forecasts for convenience and comparison goods from which inform our assessment.

Table 6.2: Annual Per Capita Expenditure Growth Forecasts

Year	Convenience (%)	Comparison (%)
2016	-0.1	3.3
2017	-0.1	1.5
2018	-0.9	0.9
2019	-0.1	2.1
2020	0.0	2.9
2021	0.2	3.3
2022	-0.1	3.4
2023	-0.1	3.4
2024	0.0	3.3
2025	0.0	3.1
2026	0.0	3.1
2027	0.1	3.1
2028	0.1	3.0
2029	0.0	3.1
2030	0.1	3.2
2031	0.2	3.4
2032	0.1	3.2
2033	0.2	3.3
2034	0.2	3.3

Source: Figure 6 of Appendix 3, Retail Planner Briefing Note 14 (November 2016)

6.07 The latest growth forecasts suggest that Brexit will likely influence per capita expenditure growth in 2017 and 2018, but that retail sales should recover somewhat over the medium term as confidence in the economy returns. However, the outlook is considerably more positive for comparison goods expenditure than it is for convenience goods expenditure.

- 6.08 For convenience goods, Experian forecasts negative or static per capita expenditure growth between 2016 and 2020 (in the range -0.9% to 0.0%). Very modest growth of +0.2% is forecast at 2021 and the forecast position thereafter suggests that sales will generally remain relatively static over the longer term.
- 6.09 In contrast, whilst Experian forecasts that Brexit will result in comparison goods per capita expenditure growth decreasing from 3.3% at 2016, to 1.5% at 2017, and then to 0.9% at 2018, the position in the medium to long term is significantly more positive. Comparison goods per capita expenditure growth is forecast to increase to 2.1% at 2019, to 2.9% at 2020, and then to 3.3% at 2021. Experian forecasts that the annual growth rate will remain above at or above 3.0% in the period to 2034.
- 6.10 However, it should be noted that growth in expenditure forecasting in the longer term (beyond the next ten years) should be treated with caution given the inherent uncertainties in predicting the economy's performance over time. Assessments of this nature should therefore be reviewed on a regular basis in order to ensure that forecasts over the medium and long are reflective of any changes to relevant available data.
- 6.11 Experian Retail Planner Briefing Note 14 also provides forecasts in respect of the proportion of expenditure which will be committed through special forms of trading (comprising 'non-store retailing', such as internet sales, TV shopping and so on) over the reporting period. We have 'stripped out' any expenditure which survey respondents indicated was committed via special forms of trading and instead have made an allowance derived from Experian's recommendation.
- 6.12 In considering special forms of trading, it should be noted that many products which are ordered online are actually sourced from a physical store's shelves or stockroom (particularly in the case of convenience goods). As such, expenditure committed in this manner acts to support stores and should be considered 'available' to tangible retail destinations.
- 6.13 Accordingly, in order not to overstate the influence of expenditure committed via special forms of trading, our approach is based on Experian's 'adjusted' figure for special forms of trading (provided at Figure 5 of Appendix 3 of its Retail Planner Briefing Note 14) which makes an allowance for internet sales which are sourced from stores. The proportion of expenditure committed through special forms of trading cited below at Table 6.3 is 'stripped out' of the identified expenditure as it is not available to stores within the Study Area.

Table 6.3: Special Forms of Trading Forecasts

Year	Convenience (%)	Comparison (%)
2017	3.2	13.8
2019	3.6	14.8
2022	4.1	15.8
2024	4.4	16.0
2029	4.9	16.2
2034	5.2	16.5

Source: Figure 5 of Appendix 3, Experian Retail Planner Briefing Note 14 (November 2016)

- 6.14 Based on the above growth rates and special forms of trading allowances, it is possible to produce expenditure estimates for each survey zone under each population growth scenario at 2017, 2019, 2022, 2024, 2029 and 2034. In doing so, our assessment takes into account both per capita retail expenditure growth and population change.

Convenience Goods Expenditure

- 6.15 Taking into consideration the above changes in population and per capita expenditure, it is estimated that, at 2017, the resident population of the Study Area generates £451.4m of convenience goods expenditure¹⁸. The below Table 6.4 indicates that available convenience goods expenditure is then forecast to increase to £467.5m at 2034. As Table 6.5 indicates, this represents a modest increase of £16.1m (or 4.0%) across the Study Area between 2017 and 2034. However, it should be noted that, due to the anticipated impact of Brexit, a small reduction in available Study Area convenience goods expenditure (of £2.5m) is actually forecast between 2017 and 2019.

Table 6.4: Total Available Study Area Convenience Goods Expenditure

2017 (£m)	2019 (£m)	2022 (£m)	2024 (£m)	2029 (£m)	2034 (£m)
451.4	448.9	452.6	454.0	459.1	467.5

Source: Table 2a of Appendix 5
In 2015 prices

¹⁸ Expressed in 2015 prices, as is every subsequent monetary value

Table 6.5: Growth in Available Study Area Convenience Goods Expenditure

Growth 2017-2019 (£m)	Growth 2017-2022 (£m)	Growth 2017-2024 (£m)	Growth 2017-2029 (£m)	Growth 2017-2034 (£m)
-2.5	1.3	2.6	7.8	16.1

Source: Table 2a of Appendix 5
In 2015 prices

- 6.16 In order to assist in the assessment of quantitative need, we have applied an estimate to account for the proportion of convenience goods expenditure which is committed through main food shopping trips and that which is committed through 'top-up' shopping trips. Based on our experience, we consider that approximately 70% of individuals' convenience goods expenditure will be committed through main food shopping trips and the remaining 30% through top-up shopping.
- 6.17 On this basis, we estimate that, across the Study Area at 2017, £316.0m of convenience goods expenditure will be spent during main food shopping trips and £135.4m during top up shopping trips.

Comparison Goods Expenditure

- 6.18 For comparison goods, Table 6.6 sets out our estimation that the resident population of the Study Area will generate £660.3m of comparison goods expenditure at 2017. Available comparison goods expenditure is then forecast to increase to £1,120.0 at 2034. As identified by Table 6.7, this represents an increase of £459.7m (or 69.6%) between 2017 and 2034. The large majority of this growth is forecast to occur in the medium to long term (i.e. in the period between 2024 and 2034).
- 6.19 Whilst the identified expenditure increase is clearly significant, the rate of forecast growth is more modest than that which has been previously achieved. This is as a consequence of forecast growth being more modest than that which has historically been secured and also a consequence of further increases in expenditure committed through special forms of trading (most particularly, internet shopping).

Table 6.6: Total Available Study Area Comparison Goods Expenditure

2017 (£m)	2019 (£m)	2022 (£m)	2024 (£m)	2029 (£m)	2034 (£m)
660.3	678.3	746.3	801.0	943.8	1,120.0

Source: Table 8 of Appendix 5
In 2015 prices

Table 6.7: Growth in Available Study Area Comparison Goods Expenditure

Growth 2017-2019 (£m)	Growth 2017-2022 (£m)	Growth 2017-2024 (£m)	Growth 2017-2029 (£m)	Growth 2017-2034 (£m)
18.0	86.0	140.7	283.6	459.7

Source: Table 8 of Appendix 5
In 2015 prices

- 6.20 For the purpose of this Study, comparison goods expenditure has been divided into eight sub-categories: 'DIY' 'Electrical' and 'Furniture' (these three categories collectively being referred to as bulky goods); and, 'Clothing & Footwear', 'CDs, DVDs and Books', 'Health and Beauty/Chemist Goods', 'Small Household Goods' and 'Toys, Games, Bicycles and Recreational Goods' (collectively referred to as non-bulky goods). The proportion of expenditure directed to each sub-category is estimated by Experian on a zonal basis.
- 6.21 In considering the above, it should be noted that if an excess of expenditure manifests itself within the Study Area, this does not necessarily translate directly into a requirement for additional floorspace. In assessing quantitative need, it is also necessary to take account of:
- Existing development proposals;
 - Expected changes in shopping patterns; and
 - The future efficiency of retail floorspace.

Market Share of Expenditure

- 6.22 Having calculated the likely levels of expenditure that are generated by the resident population within the defined Study Area, it is also relevant to consider what proportion of this expenditure is currently retained by retail facilities within South Ribble (these market shares differ to those outlined in Section 4 as they are based on retail expenditure, rather than shopping trips).
- 6.23 Table 6.8 below provides a zonal breakdown of the total convenience expenditure (both main and top-up spending) which is being spent at destinations within the South Ribble administrative area. It demonstrates that the highest proportions of expenditure spent at South Ribble destinations are within Zone 1 (94.4%) and Zone 4 (87.0%). Overall, 53.0% of the Study Area expenditure is being spent at destinations within South Ribble.

Table 6.8: South Ribble Current Market Share (2017) – Convenience Goods

Zone	South Ribble Borough Total			
	Main Food	Top Up Food	Total Convenience £m	Market Share ¹ %
1	48.4	21.2	69.5	94.4%
2	12.6	6.3	19.0	72.2%
3	29.1	20.2	49.3	65.4%
4	30.3	14.3	44.6	87.0%
5	11.5	3.3	14.8	43.3%
6	15.6	3.2	18.8	29.2%
7	12.1	2.0	14.1	25.0%
8	4.3	0.9	5.3	7.6%
Total	164.0	71.4	235.4	53.0%

Notes: Derived from Tables 2 and 4 at Appendix 5

¹ Market share of zonal and total South Ribble Borough expenditure for main and top-up food shopping.

6.24 Table 6.9 below provides a zonal breakdown of the comparison spending which is being spent at destinations within South Ribble administrative area. Again, we can see that Zone 1 has the highest proportion of total comparison expenditure being spent at South Ribble destinations at £53.7m or 51.6% of the available expenditure within Zone 1. This is followed by Zone 2, where £49.4m or 47.0% of the total available comparison expenditure is spent at destinations in South Ribble.

6.25 Overall, 31.0% of the total available Study Area expenditure is spent at destinations within South Ribble.

Table 6.9: South Ribble Current Market Share (2017) – Comparison Goods

Zone	South Ribble Borough Total									Total Comparison £m	Market Share ¹ %
	Non-Bulky					Bulky					
	Clothing & Footwear	Books/CDs/DVDs	Small Household	Recreation	Chemist	Electrical	DIY & Gardening	Furniture			
	£m	£m	£m	£m	£m	£m	£m	£m			
1	8.2	2.8	6.8	8.7	10.2	7.6	4.9	4.5	53.7	51.6%	
2	8.1	1.6	5.0	5.7	11.3	8.4	5.2	4.1	49.4	47.0%	
3	1.2	0.5	3.9	1.9	4.1	4.4	2.7	1.6	20.3	28.4%	
4	1.0	0.8	2.2	1.4	3.8	3.8	2.9	2.1	18	33.1%	
5	2.0	0.1	3.0	0.1	1.2	3.0	1.6	0.7	11.7	24.4%	
6	3.7	0.9	6.3	3.8	4.2	4.6	3.0	1.9	28.4	27.2%	
7	1.3	0.5	3.3	2.4	1.2	1.6	1.9	1.2	13.4	15.6%	
8	1.1	0.0	2.0	1.7	0.5	2.4	1.3	1.0	10	11.5%	
Total	26.6	7.2	32.5	25.7	36.5	35.8	23.5	17.1	204.9	31.0%	

Notes: Sourced from Tables 9, 11, 13, 15, 17, 19, 21 and 23 to 25 at Appendix 5

¹ Market share of zonal and total Study Area expenditure across all categories on comparison goods

Principal Convenience and Comparison Destinations

6.26 Table 6.10 below sets out the top three convenience destinations based on the total convenience expenditure, on a zonal basis. Within Zone 1, the top destination based on total convenience expenditure is the Tesco Extra on Towngate in Leyland, attracting 27.1% of the available convenience expenditure within the zone. All three of the top destinations for residents within Zone 1 are also located within the zone. Within Zone 2, the top destination is the Sainsbury's at Cuerden Way in Preston which attracts 21.5% of the available expenditure within the zone. Two of the three top destinations are located within the zone. Overall, the Tesco Extra in Leyland attracts the highest level of expenditure from across the whole Study Area at 6.9%, followed by Sainsbury's on Cuerden Way which attracts 6.8%.

Table 6.10: Top Three Convenience Destinations by Zone (based on total convenience (main and top-up) expenditure)

Zone	Main Destinations	Location of Destination
1	1. Tesco Extra, Towngate, Leyland (27.1%) 2. Morrisons, Olympian Way, Leyland (19.2%) 3. Aldi, Towngate, Leyland (18.5%)	Zone 1 Zone 1 Zone 1
2	1. Sainsbury's, Cuerden Way, Preston (21.5%) 2. Aldi, Cuerden Way, Preston (16.2%) 3. Asda, Clayton Green Garden Centre (12.6%)	Zone 2 Zone 2 Zone 6
3	1. Booths, Millbrook Way, Preston (19.5%) 2. Morrisons, Mariners Way, Preston (15.7%) 3. Sainsbury's, Cuerden Way, Preston (9.3%)	Zone 3 Zone 8 Zone 2
4	1. Booths, Liverpool Road, Preston (22.4%) 2. Aldi, Towngate, Leyland (10.4%) 3. Morrisons, Olympian Way, Leyland (9.8%)	Zone 4 Zone 1 Zone 1
5	1. Sainsbury's, Cuerden Way, Preston (12.9%) 2. Aldi, Cuerden Way, Preston (11.3%) 3. Waitrose, Capitol Centre (7.0%)	Zone 2 Zone 2 Zone 2
6	1. Asda, Clayton Green Centre, Sheephill Lane (22.0%) 2. Aldi, Harpers Lane, Chorley (9.9%) 3. Aldi, Lancaster Way, Chorley (6.4%)	Zone 6 OSA Zone 6
7	1. Tesco Extra, Foxhole Road, Chorley (10.6%) 2. Booths, Station Road, Preston (8.6%) 3. Aldi, Towngate, Leyland (6.6%)	OSA Zone 7 Zone 1
8	1. Morrisons, Mariners Way, Preston (13.2%) 2. Morrisons, Blackpool Road, Preston (10.1%) 3. Sainsbury's, Flintoff Way, Preston (5.8%)	Zone 8 OSA OSA
Total	1. Tesco Extra, Towngate, Leyland (6.9%) 2. Sainsbury's, Cuerden Way, Preston (6.8%) 3. Morrisons, Olympian Way, Leyland (6.3%)	Zone 1 Zone 2 Zone 1

6.27 Finally, Table 6.11 below sets out the top comparison destinations by zone, based on the total comparison expenditure available in each zone. Within Zone 1, the top destination is Leyland town centre, which attracts 31.1% of the available comparison expenditure in that zone. Within Zones 2, 3, 4, 5, 7 and 8, the principal destination for comparison goods spending on a zonal basis is Preston city centre. Overall, across the whole Study Area, the principal destination based on total available expenditure is Preston city centre which attracts 28.8% of the total expenditure available, followed by Leyland town centre which attracts 10.0%. This demonstrates the draw of Preston city centre as the principal comparison goods shopping destinations across the Study Area.

Table 6.11: Top Three Comparison Destinations by Zone (based on total comparison expenditure)

Zone	Main Destinations	Location of Destination
1	1. Leyland town centre (31.1%) 2. Preston city centre (16.5%) 3. Capitol Centre (10.0%)	Zone 1 OSA Zone 2
2	1. Preston city centre (26.8%) 2. Capitol Centre (13.6%) 3. Bamber Bridge District Centre (12.2%)	OSA Zone 2 Zone 2
3	1. Preston city centre (42.9%) 2. Penwortham district centre (9.3%) 3. Deepdale Shopping Park (8.4%)	OSA Zone 3 OSA
4	1. Preston city centre (36.2%) 2. Longton district centre (7.9%) 3. Capitol Centre (6.5%)	OSA Zone 4 Zone 2
5	1. Preston city centre (23.9%) 2. Blackburn town centre (15.8%) 3. Capitol Centre (14.0%)	OSA OSA Zone 2
6	1. Chorley town centre (16.0%) 2. Preston city centre (15.9%) 3. Leyland town centre (11.9%)	OSA OSA Zone 1
7	1. Preston city centre (19.7%) 2. Chorley town centre (14.3%) 3. Southport town centre (10.7%)	OSA OSA OSA
8	1. Preston city centre (48.6%) 2. Deepdale Shopping Park (22.5%) 3. Capitol Centre (5.1%)	OSA OSA Zone 2
Total	1. Preston city centre (28.8%) 2. Leyland town centre (10.0%) 3. Capitol Centre (8.1%)	OSA Zone 1 Zone 2

7.0 Retail Capacity in South Ribble Borough

Introduction

- 7.01 We have examined the need for new convenience and comparison goods floorspace over five year reporting periods working back from 2034 (i.e. at 2019, 2024, 2029 and 2034). A further reporting year of 2022 has been included, which represents five years from the base date of 2017. The base date of 2017 and the reporting year of 2022 accord with those adopted in the Retail & Leisure Assessment which accompanies the current planning application (reference 07/2017/0211/ORM) which seeks to provide for the mixed-use development (including a substantial quantum of retail floorspace) of the Cuerden Strategic Site near Bamber Bridge.
- 7.02 At the outset, it is important to note that a quantitative assessment of capacity over the long term should be viewed with caution, due to the obvious difficulties inherent in predicting the performance of the economy and shopping habits over time. In any event, any identified capacity should not necessarily be viewed as justification of new retail floorspace outside of centres as this could prejudice the implementation of any emerging town centre redevelopment strategies and the development of more central sites which may be currently available or which could become available over time.
- 7.03 A complete series of quantitative capacity tables are provided at Appendix 5 which provide further detail in terms of the step-by-step application of our quantitative assessment methodology.

Capacity Formula

- 7.04 For all types of capacity assessment, the conceptual approach is identical, although the data sources and assumptions may differ. The key relationship is Expenditure (£m) (allowing for population change and retail growth) *less* Turnover (£m) (allowing for improved 'productivity') *equals* Surplus or Deficit (£m).
- 7.05 **Expenditure (£m)** – The expenditure element of the above equation is calculated by taking the population within the defined catchment and then multiplying this figure by the average annual expenditure levels for various forms of retail spending per annum. The expenditure is estimated with reference to a number of factors, namely:
- Growth in population;
 - Growth in expenditure per person per annum; and

South Ribble Retail and Leisure Study

- Special Forms of Trading (e.g. the internet, catalogue shopping and so on).
- 7.06 **Turnover (£m)** – The turnover figure relates to the annual turnover generated by existing retail facilities within the Study Area. The turnover of existing facilities is calculated using Mintel Retail Rankings and Verdict UK Grocery Retailers reports – independent analysis which lists the sales densities for all major multiple retailers.
- 7.07 **Surplus/Deficit (£m)** – This represents the difference between the expenditure and turnover figures outlined above. A surplus figure represents an effective under provision of retail facilities within the Study Area (which, all things being equal, would suggest that additional floorspace could be supported), whereas a deficit would suggest a quantitative overprovision of retail facilities.
- 7.08 Although a surplus figure is presented in monetary terms, it is possible to convert this figure to provide an indication of the quantum of floorspace which may be required. The level of floorspace will vary dependent on the type of retailer proposed and the type of goods traded. For example, in the case of comparison goods, non-bulky goods retailers tend to achieve higher sales densities than bulky goods retailers. However, within the bulky goods sector itself there is significant variation, with electrical retailers tending to have a much higher sales density than those selling DIY or furniture goods.

Future Capacity for Convenience Goods Floorspace

- 7.09 In order to ascertain the likely need for additional convenience goods floorspace in South Ribble, it is first necessary to consider the performance of the current provision. Given that the Borough already accommodates a relatively comprehensive range of convenience goods retail facilities, it is assumed that the future convenience goods expenditure available to South Ribble will be commensurate with its current market share of such expenditure.
- 7.10 The 'benchmark' turnover differs for each operator based on its average turnover per square metre throughout the country. Although robust up-to-date information is available in terms of the convenience goods floorspace provided by large foodstores, it can be more difficult to quantify the extent of local convenience provision as there is no single comprehensive database to rely upon. Where we have been unable to verify the exact quantum of floorspace provided by existing smaller-scale convenience goods stores (such as farm shops and 'corner shops' located within defined centres), we have assumed that stores are trading 'at equilibrium' (i.e. the survey-derived turnover equates to the expected level of turnover).

- 7.11 For each convenience goods retail destination, consideration has been given as to whether any of its turnover is likely to be derived as 'inflow' from outside the Study Area. In making such judgements we have utilised the findings of the in-street surveys, which record the home postcode of each respondent. Accordingly, we are therefore able to ascertain from the in-street survey the proportion of visitors to a centre who have travelled from outside the Study Area. We have assumed that this broadly correlates with the inflow of expenditure to each of these destinations from outside the Study Area (we have applied the same figure for both convenience and comparison goods).
- 7.12 Where no such information is available, we have used our professional judgement and experience to estimate the likely level of inflow. We do not believe that small centres and retail venues are likely to attract any material level of expenditure from beyond the Study Area and we have therefore assumed nil inflow to such destinations. Full details of our inflow assumptions in respect of convenience goods retail venues are set out at Table 5 of Appendix 5.
- 7.13 Our assessment is based upon a 'goods based' approach, which disaggregates expenditure by category type, and it is important to recognise that major foodstore operators generally sell an element of non-food goods such as books, compact discs, clothing and household goods. To account for this, the typical ratio between convenience/comparison goods provision for each operator¹⁹ has been applied to the estimated net floorspace of each foodstore²⁰. This provides an indication of the likely sales area dedicated to the sale of convenience goods at each store.
- 7.14 Whilst survey results are commonly accepted as a means by which to identify existing shopping patterns, their findings should be treated with a 'note of caution' as they can have a bias towards national multiple retailers and, as a consequence, may understate the role of smaller stores and independent retailers.
- 7.15 Our assessment identifies that taking all convenience goods retail facilities in South Ribble together, the expected turnover of provision is £271.1m per annum at 2017, which is greater than the identified survey-derived turnover of £253.4m (including identified inflow). This suggests that, taken cumulatively, existing convenience goods turnover is 'undertrading' when

¹⁹ Generally derived from Verdict's 2015 estimates of the typical floorspace split for major convenience goods retailers. Where Verdict data is not available or is considered not to appropriately reflect how a store trades in practice, we have applied professional judgement in the manner set out in the notes to Table 5 of Appendix 5

²⁰ Net sales areas have generally been sourced from the Storepoint database of food retailers. Where such data is not available, we have applied professional judgement in the manner set out in the notes to Table 5 of Appendix 5

compared to its expected turnover. Accordingly, it would appear that the existing food retail provision is sufficient to meet the existing quantitative need.

- 7.16 However, there are instances where specific facilities trade very strongly or relatively poorly. For example, the Aldi store at Leyland (in Zone 1) has an estimated convenience goods benchmark turnover of £7.9m, but turns over an estimated £28.8m of convenience goods expenditure. The other Aldi store at Cuerden Way (in Zone 2) has an estimated convenience goods benchmark turnover of £11.9m, but turns over an estimated £21.2m of convenience goods expenditure. The Booths store at Millbrook Way (in Zone 3) has an estimated convenience goods benchmark turnover of £10.8m, but turns over an estimated £21.6m of convenience goods turnover.
- 7.17 By way of contrast, the convenience goods turnovers of the Sainsbury's store at Cuerden Way and the Waitrose at the Capitol Centre (both within Zone 2) are £14.8m and £20.4m less than their respective convenience goods benchmark turnovers of £49.6m and £32.4m.
- 7.18 Whilst we have no doubt that the Aldi stores and the Booths store are performing very strongly indeed (and that the abovementioned Sainsbury's and Waitrose stores are performing significantly below benchmark level), it should be noted that the estimation of stores' turnover is subject to a number of assumptions. For example, in apportioning main and top up convenience goods expenditure using the household survey, it is assumed that each resident of a zone spends the zonal per capita expenditure average on such items. However, in actuality, the typical discount foodstore customer may spend a lesser amount than the typical 'big four' foodstore shopper. Accordingly, there is the possibility that the turnover of certain discount foodstores may have been overestimated and that the turnover of certain 'big four' foodstores may have been underestimated. However, when considering convenience goods retail capacity across the Study Area as a whole, the methodology acts to balance out any such discrepancies.
- 7.19 The individual performance of each of the main convenience goods facilities is identified at Table 5 of Appendix 5.
- 7.20 In order to appraise the need for additional convenience goods retail floorspace, it is necessary to consider how the performance of stores will be affected by future growth in expenditure. Accordingly, Table 7.1 also sets out the anticipated increases in expenditure which will be available to the Borough's convenience goods retail facilities, assuming that the

current market share of 53.0% is maintained. It is also assumed that the turnover of existing floorspace will improve through improvements in floorspace efficiency as set out in Experian Retail Planner Briefing Note 14. Following this exercise, we then consider the effect extant planning commitments will have in addressing any identified convenience goods shopping needs under each of the growth scenarios.

7.21 Table 7.1 indicates that, after taking into consideration future increases in both population and expenditure, an effective convenience goods expenditure deficit of £17.6m is identified at 2017. By 2034, after increases in population and expenditure are considered against changes in floorspace productivity²¹, we estimate that there will still be an expenditure deficit of £9.1m.

Table 7.1: Quantitative Need for Convenience Goods Floorspace in South Ribble Borough

Year	Benchmark Turnover (£m) ¹	Available Expenditure (£m) ²	Surplus Expenditure (£m)
2017	271.0	253.4	-17.6
2019	269.7	252.0	-17.7
2022	268.9	254.1	-14.8
2024	268.9	254.9	-14.0
2029	270.2	257.8	-12.4
2034	271.6	262.5	-9.1

Source: Table 6A of Appendix 5

¹ Benchmark turnover to increase in line with improvements in turnover efficiency set out in Table 4a of Addendum to Experian Retail Planner 14 (November 2016)

² Assumes constant market share of Study Area expenditure (53.0%) claimed by facilities in South Ribble 2015 Prices. Available Expenditure includes inflow allowance.

7.22 We are aware of two substantial convenience goods extant planning permissions, namely: the permission (reference 07/2013/0927) which provides for the sub-division of the existing Bamber Bridge B&Q store near Bamber Bridge to provide a Morrisons foodstore; and, the permission (reference 07/2011/0380) to erect a Sainsbury's foodstore at a site at the edge of Penwortham district centre.

7.23 In respect of the former planning permission, we are aware that Morrisons' new store openings are very limited in number and that it has actually announced a number of store closures in recent years. In this context, we are unaware of Morrisons (or any other operator)

²¹ Account has been made for the turnover efficiency of existing convenience goods floorspace to change (on the basis that operators have historically been able to make their existing floorspace more productive over time) in accordance with the projections set out in Table 4a of Experian Retail Planner Briefing Note 14 (these being -0.4% at 2018, -0.1% per annum between 2019 and 2023, and +0.1% between 2024 and 2034)

indicating that it intends to implement the Bamber Bridge consent. As such, we believe that it is now unlikely that the permission will come forward in practice.

7.24 By way of contrast, the Council accepts that a material start has been made in implementing the Penwortham foodstore permission (in order that it remains extant in perpetuity). Furthermore, an additional application (reference 07/2016/1171/FUL) has been submitted by Tesco Stores Limited for a revised scheme which is to include a smaller food superstore than that which is the subject of the existing permission, along with two additional comparison goods units. The Tesco application was approved by the Council in July 2017 and we therefore include this as the relevant commitment for the purposes of this Study. We provide our estimated turnover of the convenience floorspace below, based on an average sales density for a Tesco foodstore.

Table 7.2: Extant Convenience Goods Commitment in South Ribble Borough

Location	Planning Application Reference	Proposal	Net Conv Sales (sq.m)	Conv Sales Density (£ per sq.m)	Estimated Turnover at 2017 (£m)	Status
Land at Liverpool Road/Cop Lane, Penwortham	07/2016/1171/FUL	Erection of class A1 retail store	1,866	13,466	25.1	Extant permission

Source: Table 6d of Appendix 5
2015 Prices

7.25 Full details of the assumptions made in estimating the turnover of the commitment are provided in the notes which accompany Table 6d of Appendix 5. If the above commitment did come forward, it would act to further increase the identified convenience goods expenditure deficit across the Borough. Table 7.3 identifies that, after taking account of the commitment, a deficit of £42.7m is identified at 2017, which reduces to £34.3m at 2034. However, it is evident that there is no quantitative requirement for additional convenience goods floorspace in the Borough across the entire period to 2034 irrespective of whether or not the commitment comes forward.

Table 7.3: Quantitative Need for Convenience Goods Floorspace in South Ribble Borough

Year	Convenience Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus (£m)	Commitments (£m)	Residual (£m)	Min ^{1*}	Max ^{2*}
2017	-17.6	25.1	-42.7	-3,300	-6,100
2019	-17.7	25.0	-42.7	-3,300	-6,100
2022	-14.8	24.9	-39.7	-3,100	-5,700
2024	-14.0	24.9	-38.9	-3,000	-5,600
2029	-12.4	25.1	-37.5	-2,900	-5,400
2034	-9.1	25.2	-34.3	-2,600	-4,900

Source: Table 6c of Appendix 5

¹ Average sales density assumed to be £13,042 per sq.m at 2017 (based on the average sales density of the leading four supermarket operators as identified by Verdict 2015)

² Average sales density assumed to be £7,000 per sq.m at 2017 (based on the average sales density of discount food retailers)

2015 Prices

Future Capacity for Comparison Goods Floorspace

7.26 Turning to comparison goods capacity, it is first important to note that our methodology deviates from that which has been deployed in respect of convenience goods for two principal reasons. Firstly, it can be extremely difficult to attribute an appropriate benchmark turnover to existing comparison goods provision. Secondly, there tends to be greater disparity between the trading performance of apparently similar comparison goods provision depending on its location, the character of the area and the nature of the catchment. As a consequence, we adopt the approach with comparison goods floorspace that it is trading 'at equilibrium' (i.e. our survey derived turnover estimate effectively acts as benchmark) at 2017.

7.27 We assume that there is therefore a nil quantitative need for any additional floorspace across the Borough at 2017. Once again, it has generally been assumed that the future performance of South Ribble's facilities will be commensurate with its current market share. However, we once again make provision for some of South Ribble's defined centres and out of centre retail venues to attract custom from outside the Study Area. Once more, we have utilised the findings of the in street survey to determine the level of inflow where such information is available. For other locations, we have used professional judgement. We set out all our detailed assumptions in respect of inflow within Table 25 of Appendix 5.

7.28 The inflow allowance has the net effect of increasing South Ribble's identified comparison goods survey derived turnover from £204.5m to £230.8m at 2017 (inflow therefore equating to £26.3m and representing 13% of total turnover).

South Ribble Retail and Leisure Study

- 7.29 The £204.5m of comparison goods expenditure claimed by facilities in South Ribble from inside the Study Area at 2017 equates to a market share of 31.0% of all comparison goods expenditure generated by residents of the Study Area. Our assessment 'rolls forward' this market share to examine the likely level of comparison goods floorspace required to maintain the role and function of South Ribble's comparison goods retail facilities going forward.
- 7.30 By 'rolling forward' this market share and making provision for inflow deriving from visitors to the Study Area, as set out below in Table 7.4, we estimate that facilities in South Ribble Borough will attract £230.8m of comparison goods expenditure at 2017, increasing to £238.5m at 2019, to £255.3m at 2022, to £266.9m at 2024, to £292.4m at 2029, and to £331.8m at 2034.
- 7.31 After accounting for forecast increases in comparison goods expenditure and population, and allowing for year on year increases in the productivity of existing floorspace, we estimate that by 2022 there will be a small expenditure deficit of £5.6m, which indicates that there is no quantitative need for additional comparison goods floorspace in South Ribble in the very short term.
- 7.32 However, as set out in Table 7.4, we estimate that a surplus of £13.1m will be evident at 2024, increasing to £32.3m at 2029, and then to £59.7m at 2034. In calculating the expenditure surplus, account has been taken of the forecast increases in the sales efficiency of existing comparison goods floorspace²² which are set out in Experian Retail Planner Briefing Note 14.

²² Table 4b of the Experian Retail Planner Briefing Note 14 identifies improvements in comparison goods floorspace sales efficiency of +1.0% at 2018, +2.3% per annum between 2019 and 2023, and +2.2% per annum between 2024 and 2034)

Table 7.4: Quantitative Need for Comparison Goods Floorspace in South Ribble Borough

Year	Benchmark Turnover (£m) ¹	Available Expenditure (£m) ²	Surplus Expenditure (£m)
2017	230.8	230.8	0.0
2019	238.5	237.1	-1.4
2021	255.3	260.9	5.6
2024	266.9	280.0	13.1
2029	297.6	329.9	32.3
2034	331.8	391.5	59.7

Source: Table 26A of Appendix 5

¹ Turnover of existing stores to increase in line with improvements in turnover efficiency set out in Table 4b of Experian Retail Planner 14 (November 14)

² Assumes constant market share (31.0%) claimed by facilities within the Study Area 2015 Prices. Available expenditure includes allowance for inflow.

- 7.33 The above analysis does not take into consideration commitments. Whilst some comparison goods floorspace would come forward as a consequence of the proposed Morrisons store at Bamber Bridge, we do not believe that this commitment will now likely be delivered in practice.
- 7.34 Once more, we note that the planning permission for the food superstore at Penwortham has been implemented (in part) and remains extant. However, the Council has approved a revised proposal for the same site (which would provide a greater overall quantum of comparison goods retail floorspace), which we consider is therefore more likely to come forward. We have therefore only included the latest extant permission for the purposes of this assessment.
- 7.35 Furthermore, we are aware that there is an extant permission at the South Preston Office Village on Cuerden Way for the redevelopment to create new Class A1, B2, B8 and D2 floorspace. This permission includes the provision of up to 6,690 sq.m (gross) comparison floorspace. Whilst the commitment has been included as part of the capacity assessment for completeness, we understand that due to the length of period which has lapsed since the original permission, and lack of any further applications since the variation, it is unlikely that the scheme will come forward. We provide our estimate of the comparison goods turnover of the commitment below at Table 7.5.

Table 7.5: Extant Comparison Goods Commitment in South Ribble Borough

Location	Planning Application Reference	Proposal	Net Comp Sales (sq.m)	Comp Sales Density (£ per sq.m)	Estimated Turnover at 2015 (£m)	Status
Land at Liverpool Road/Cop Lane, Penwortham	07/2016/1171/FUL	Erection of class A1 retail store and 2 non-food units	1,060	-	5.6	Extant planning permission
South Preston Office Village Cuerden Way Bamber Bridge Lancashire	07/2013/0843/VAR	Redevelopment for uses within Classes A1, B1, B2, B8 and D2	5,352	4,000	21.4	Extant planning permission

Source: Table 6d of Appendix 5
2015 Prices

7.36 Full details of the assumptions made in estimating the turnover of the commitment are provided in the notes which accompany Table 26d of Appendix 5. If the above commitments did come forward, it would act to reduce the comparison goods expenditure surplus which is evident across the medium to long term. Table 7.6 identifies that, after taking account of the commitments, there is no identified capacity in the short to medium term, with a surplus of £20.9m identified by 2034.

Table 7.6: Quantitative Need for Comparison Goods Floorspace in South Ribble Borough

Year	Comparison Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus (£m)	Commitments (£m)	Surplus (£m)	Min ^{1*}	Max ^{2*}
2017	0.0	27.0	-27.0	-5,400	-9,000
2019	-1.4	27.9	-29.3	-5,700	-9,400
2022	5.6	29.9	-24.3	-4,400	-7,300
2024	13.1	31.2	-18.2	-3,100	-5,200
2029	32.3	34.8	-2.5	-400	-600
2034	59.7	38.8	20.9	2,900	4,800

Source: Table 26c of Appendix 5

¹ Average sales density assumed to be £5,000 per sq.m at 2017

² Average sales density assumed to be £3,000 per sq.m at 2017
2015 Prices

Qualitative Need

- 7.37 Paragraph 158 of the NPPF makes clear that local planning authorities should 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.
- 7.38 Paragraph 161 of the NPPF goes on to state that LPAs should use this evidence base to assess **'...the needs for land or floorspace for economic development, including both the quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including for retail and leisure development'**.
- 7.39 Deficiencies and gaps in existing retail provision can be considered on the basis of the Study Area as a whole and in terms of the Borough's individual centres. As set out within Section 4 of this report, we consider that the Study Area has a reasonably good retention rate for convenience goods expenditure, but a relatively poor retention rate for comparison goods expenditure.
- 7.40 This poor comparison expenditure retention rate points to some deficiencies in retail provision within the Borough's individual centres, most particularly in Leyland town centre. However, when considering such deficiencies, it is important to note that the Borough's residents generally benefit from easy access to Preston city centre and proximate retail parks. Accordingly, it is evident that such destinations (in particular, the city centre) have a qualitative role to play in meeting many of the comparison goods needs of South Ribble's residents.
- 7.41 In terms of convenience goods provision, we believe that there is generally a good choice available across the Borough, from premium operators (Booths), to the 'big four' supermarket operators, to discounters (such as Aldi and Lidl). Indeed, in this regard, the results of the household telephone survey (as set out in Section 6 of this report) indicate that many foodstores within the Borough are undertrading when compared to company average/benchmark figures. This suggests that the number of foodstores is currently greater than might be expected.
- 7.42 Convenience goods retail facilities in South Ribble Borough turn over £253.4m at 2017 (including an allowance for inflow), which is less than their expected benchmark turnover of £271.0m. However, in examining the performance of specific stores, it is evident that smaller, discount supermarkets (operated by the likes of Aldi and Lidl) are generally performing better

in South Ribble than food superstores²³ operated by the 'big four' (relative to their expected 'benchmark' performance). Benchmark performances are clearly representative of a company's average performance and numerous stores will undertrade or overtrade in relation to benchmark without significant issues arising.

- 7.43 The strong performance of discount retailers is exemplified by the performance of the Aldi at Leyland, which is estimated to trade £21.0m above its convenience goods benchmark level at 2016, together with the Lidl at Leyland and the Aldi at Cuerden Way. The Borough's three discount stores cumulatively overtrade by £34.3m.
- 7.44 The very strong performance of the discount sector in South Ribble suggests that it may currently be underprovided for and that the Council could expect further planning applications for such uses in the short to medium term (potentially including proposals to extend existing stores). These should be considered having regard to the qualitative benefits which may result from the delivery of additional convenience goods retail facilities but also with regard to the impacts which may arise at any existing centre.
- 7.45 Other than the discount retailers, the other foodstore which trades particularly strongly is the Booths at Millbrook Way in Preston in Zone 3, which we estimate has a convenience goods turnover £10.7m above expected benchmark level.
- 7.46 By way of contrast, the performance of the big food superstores in South Ribble is such that there does not generally appear to be any pressing requirement for further stores of this format across the Borough as a whole. However, as noted in our health check assessments, Penwortham has a relatively modest convenience goods provision, which could be addressed by the current application proposal to being forward a Tesco foodstore (subject to the proposal being acceptable in planning policy terms). However, the 'big four' operators are generally circumspect in terms of their appetite to bring forward additional foodstores and we do not believe it likely that there will be further significant requirements from these operators in the short to medium terms.

²³ Defined as having a net sales area of more than 2,500 sq.m

8.0 Commercial Leisure Needs

- 8.01 Our approach to the assessment of commercial leisure needs necessarily departs from our retail methodology for a number of reasons, including the fragmentation of the market and the limited availability of accurate expenditure data. However, the household survey questioned respondents about their use of commercial leisure facilities and, through reference to market share, we are therefore able to form a view as to how facilities currently meets the needs of the Borough's population in relation to the bingo, cinema, ten-pin bowling and health and leisure centre sectors. In considering commercial leisure needs, it is important to note that facilities in Preston appropriately help meet needs which originate in South Ribble and the assessment which follows is undertaken on this basis.
- 8.02 We utilise national statistics in respect of the typical level of provision of specific types of facilities to assist our judgement in respect of the likely future need for additional facilities in the administrative area. By reference to estimated increases in the Study Area population, this 'benchmarking' exercise provides an indication of the likely future need for additional commercial leisure facilities in the South Ribble.
- 8.03 For each leisure sector, we consider the current broad patterns of existing use, before then assessing the quantitative need for additional facilities.

Participation Rates

- 8.04 The Household Survey asked respondents which leisure activities they participate in. Across the Study Area as a whole, the most popular leisure activity mentioned by respondents was visiting restaurants (which 65.3% of respondents visit), visiting the cinema (41.8%) followed by pubs/bars (40.3%) and visiting the theatre/concert halls (32.0%). Less than a quarter (23.9%) of respondents stated that they visit museums and art galleries. Only 4.1% of respondents stated that they visit nightclubs and just 3.6% stated that they visit bingo halls.

Table 8.1: Participation Rates

Leisure Activity	Participation Rate
Restaurant	65.3%
Cinema	41.8%
Pub/Bars	40.3%
Theatre/concert hall	32.0%
Museum/art galleries	23.9%
Health & fitness	19.9%
Leisure centre activities	13.8%
Ten pin bowling	8.1%
Social club	5.4%
Nightclub	4.1%
Bingo	3.6%

Question 46 of Household Survey, Appendix 2

Bingo

- 8.05 The South Ribble administrative area does not currently accommodate any bingo halls. The closest bingo halls to the South Ribble Borough are the two Club 3000 facilities in Preston (Zone 8). The Club 3000 at Tithebarn Street hosts afternoon bingo and the Club 3000 at New Hall Lane hosts the evening games. Unsurprisingly, the household survey indicates that the New Hall Lane facility is by far the most popular of the two.
- 8.06 Across the Study Area as a whole, the Club 3000 bingo hall at New Hall Street in Preston accounts for 58.3% of all trips. The club secures the highest percentage of trips that originate from Zones 2, 5 and 8. It is important to note that participation rates for bingo halls is very low and, as such, the proportions set out in Table 8.2 are calculated from a low level of responses.

Table 8.2: Market Share of Facilities for Bingo Hall Visits (%)

Zone	Address	1	2	3	4	5	6	7	8	Total
8	Club 3000, New Hall Street, Preston	34.6%	82.6%	39.4%	34.8%	100.0%	0.0%	0.0%	75.7%	58.3%
1	Leyland	11.9%	0.0%	0.0%	0.0%	0.0%	51.2%	0.0%	0.0%	4.5%
OSA	Gala Bingo, Market Street, Chorley	41.5%	0.0%	0.0%	0.0%	0.0%	48.8%	0.0%	0.0%	7.5%
OSA	Mecca Bingo, Lord Street, Southport	0.0%	0.0%	0.0%	42.9%	0.0%	0.0%	43.7%	0.0%	6.5%

Source: Question 52 of Household Survey, Appendix 2. Includes all responses located within Study Area and those receiving more than 1.0% of total market share of trips outside Study Area

Note: 'OSA' relates to facilities outside of the Study Area

8.07 The Study Area has a total estimated population of 215,521 at 2017, increasing to 227,523 at 2034. Mintel reports²⁴ that there were 354 bingo halls in the UK at March 2015, which applying the Office for National Statistics' estimated population of the UK of 65.1 million (for June 2015)²⁵, suggests that each hall is supported by a catchment of 183,898 persons or thereabouts. Accordingly, we estimate that, on this basis, the Study Area population could support 1.2 bingo clubs at 2017 and at 2034. This is broadly consistent with the current level of provision across the Study Area, given that there are two principal clubs which operate at different times. The requirement in the South Ribble authority area equates to 0.6 bingo halls in the period to 2034, which we believe can be appropriately met in Preston city centre given its proximity to the Borough.

8.08 It should also be noted that the bingo market has been significantly affected by the 2007 ban on smoking in enclosed public places, an increase in the proliferation of fixed odd gaming machines, and an increase in online gambling. However, recent reports indicate that the industry has begun to stabilise, supported by the Government halving Bingo Duty from July 2014 and a shift towards a refreshed and younger customer base. Mintel²⁶ forecasts modest year on year market growth of around 1% over the coming years with consumer expenditure of £690m at 2014 increasing to £728m at 2019.

8.09 As a consequence of this, new bingo hall openings are few and far between and we therefore do not consider it likely that there will be any change to current provision in the Study Area in the foreseeable future. Accordingly, we do not consider it necessary to plan for additional provision in the period to 2034, but instead recommend that, should any proposals for such

²⁴ 'Casinos and Bingo', Mintel, March 2015

²⁵ 'Population Estimates for UK, England and Wales, Scotland and Northern Ireland: Mid-2015', Office for National Statistics, June 2016

²⁶ 'Casinos and Bingo', Mintel, March 2015

development be forthcoming, they are judged on their own merit in accordance with relevant town centre planning policy at the time of an application's submission.

Table 8.3: Bingo Hall Requirement in Study Area and South Ribble

Year	Study Area Population	Typical Population Required to Support Hall	Potential Number of Clubs Supported by Study Area	South Ribble Population	Potential Number of Clubs Supported in South Ribble
2017	215,521	183,898	1.2	111,491	0.6
2019	217,799	183,898	1.2	112,439	0.6
2022	220,042	183,898	1.2	113,819	0.6
2024	221,921	183,898	1.2	114,614	0.6
2029	225,112	183,898	1.2	116,128	0.6
2034	227,523	183,898	1.2	117,503	0.6

Note: Number of persons required to support a bingo hall derived from Mintel's Casinos and Bingo Halls report and ONS population data

Cinema

8.09 As set out below at Table 8.3, the results of the household survey indicate that the Vue cinema at the Capitol Centre, is the single most popular facility, securing 43.6% of trips which originate within the Study Area. This is followed by the Odeon at Portway in Preston, which attracts 23.3% of trips.

8.10 Looking outside the Study Area, 18.9% of the trips are directed to the Vue at Middlebrook Retail Park in Bolton and 5.0% are to the Vue at Ocean Plaza in Southport. Overall, a total of 14.5% of trips from within the Study Area are to destinations outside of the Study Area.

Table 8.4: Study Area Market Share for Cinema Visits (%)

Zone	Address	1	2	3	4	5	6	7	8	Total
2	Vue, Capitol Centre, Walton-le-Dale, Preston	49.2%	69.1%	20.7%	28.0%	53.1%	37.1%	26.1%	47.9%	43.6%
8	Odeon Cinema, Portway, Preston	28.2%	13.1%	56.2%	46.8%	4.1%	1.8%	4.5%	32.9%	23.3%
OSA	Vue, Middlebrook Retail Park	15.7%	14.7%	23.1%	1.2%	16.8%	47.3%	34.4%	0.0%	18.9%
OSA	Vue, Ocean Plaza, Southport	0.0%	0.0%	0.0%	19.6%	0.0%	0.0%	32.9%	0.0%	5.0%

Source: Question 48 of Household Survey, Appendix 2

Note: 'OSA' relates to facilities outside of the Study Area

- 8.11 The cinema sector has generally struggled over the last five years with falling admissions. Admissions of 158 million in 2014 represented a decline of 8% from that of 2011²⁷. However, with the economy improving and a series of high profile releases scheduled, it was expected that the sector would return to growth in 2016. Admissions for 2015 were estimated to be 173 million, with Mintel²⁸ forecasting an increase in admissions to 175 million in 2020. In terms of facilities, the number of cinemas in the UK experienced gradual decline between 2010 and 2014 during the economic downturn. However, 2015 saw a small increase in the total number of UK cinema sites, which increased from 743 at the close of 2014 to 757 at the close of 2015.
- 8.12 Once again, we estimate that the Study Area has a total estimated population of 215,521 at 2017, increasing to 227,523 at 2034. The Mintel Cinema Market report of November 2015 estimates that the UK population on average visits a cinema 2.7 times per annum and that each cinema screen attracts around 42,927 separate admissions.
- 8.13 Based on the estimated population within the Study Area at 2017 and as set out below at Table 8.5, we calculate that the population could support 13.6 screens at 2017, increasing to 14.3 screens at 2034. When the population in South Ribble Borough is considered, the requirement drops to 7.0 screens at 2016 and to 7.4 screens at 2034.
- 8.14 There are two cinemas within the Study Area: the Vue Cinema at the Capitol Centre (within the South Ribble boundary), which has seven screens; and, the Odeon Cinema at Portway in Preston, which has 10 screens. Accordingly, the level of provision throughout the Study Area as a whole is slightly above expectations, and within the Borough itself it is broadly in line with expectations. Accordingly, we do not find there to be any pressing quantitative need for an additional cinema over the forthcoming plan period, and do not consider it necessary to plan for additional provision in the period to 2034. Once more, should any such proposals be forthcoming, they should be judged on their own merits in accordance with relevant town centre planning policy.

²⁷ 'Cinemas', Mintel, November 2014

²⁸ 'Cinemas', Mintel, November 2015

Table 8.5a: Cinema Screen Requirement in Study Area

Year	Study Area Population	Number of Cinema Visits Per Person	Attendance	Number of Admissions Required to Support Screen	Screens Supported
2017	215,521	2.7	581,907	42,927	13.6
2019	217,799	2.7	588,057	42,927	13.7
2022	220,042	2.7	594,113	42,927	13.8
2024	221,921	2.7	599,187	42,927	14.0
2029	225,112	2.7	607,802	42,927	14.2
2034	227,523	2.7	614,312	42,927	14.3

Note: Number of cinema visits per person and trips required to support cinema screen derived from Mintel's Cinemas report (November 2015)

Table 8.5b: Cinema Screen Requirement in South Ribble

Year	South Ribble Population	Number of Cinema Visits Per Person	Attendance	Number of Admissions Required to Support Screen	Screens Supported
2017	111,491	2.7	301,026	42,927	7.0
2019	112,439	2.7	303,585	42,927	7.1
2022	113,819	2.7	307,311	42,927	7.2
2024	114,614	2.7	309,458	42,927	7.2
2029	116,128	2.7	313,546	42,927	7.3
2034	117,503	2.7	317,258	42,927	7.4

Note: Number of cinema visits per person and trips required to support cinema screen derived from Mintel's Cinemas report (November 2015)

Ten Pin Bowling

- 8.15 There are no dedicated bowling alleys located within the Study Area. Other ten pin bowling alleys outside of the Study Area which attract trips which originate from inside include MFA Bowl at Preston (which secures a Study Area market share of 57.9% of such trips), the Hollywood Bowl at Middlebrook (18.6%) and the Premier Bowl and Laser at Marine Drive in Southport (13.1%). Overall, a total of 93.4% of trips originating from within the Study Area are directed to destinations outside.

Table 8.6: Study Area Market Share for Ten Pin Bowling Visits (%)

Zone	Address	1	2	3	4	5	6	7	8	Total
OSA	MFA Bowl, 50 Greenbank Street, Preston	51.6%	100.0%	66.6%	85.0%	25.8%	21.0%	6.7%	100.0%	57.9%
OSA	Hollywood Bowl, Middlebrook Leisure Park, Horwich	29.7%	0.0%	0.0%	6.7%	0.0%	61.6%	0.0%	0.0%	18.6%
OSA	Premier Bowl and Laser, Marine Drive, Southport	0.0%	0.0%	33.4%	0.0%	0.0%	0.0%	93.3%	0.0%	13.1%

Source: Question 51 of Household Survey, Appendix 2. Includes all responses located within Study Area and those receiving more than 1.0% of total market share of trips outside Study Area

Note: 'OSA' relates to facilities outside of the Study Area

8.16 The tenpin bowling sector in general has experienced decline over the last ten years, with a gradual reduction in the number of facilities. However, in very recent times, the market has shown positive signs, with Mintel²⁹ forecasting modest market growth equivalent to approximately 4% per annum between 2015 and 2018. An alternative business model has recently developed for in-centre 'boutique' bowling facilities, with a greater focus on food and drink, as a fashionable alternative to the traditional family-orientated bowling experience. This business model has potential to support the evening economy within towns and cities as an alternative use for struggling night clubs venues, where the market has been found to have contracted in recent years. Participation in tenpin bowling is found to have remained relatively popular amongst both young adults and families. Mintel identifies that 52% of 16 to 24 year olds visited a bowling alley within the last year, with this reducing to 50% of those aged between 25 to 34 and 39% of those aged 35 to 44, with participation levels reducing significantly within older age groups.

8.17 In terms of the expected benchmark level of provision, we note that the Mintel Tenpin Bowling report of May 2014 identified that there were 5,617 bowling lanes across the UK in 2014. Given that the UK population at 2014 was approximately 64.6 million³⁰, this equates to one lane for every 11,500 persons. Based on the estimated population within the Study Area at 2017, the level of ten pin lanes which could be supported is 18.7 at 2017, increasing to 19.8 at 2034. Looking at the proportion of the population within the South Ribble administrative area specifically, we have calculated that the population would support 9.7 lanes at 2017, increasing to 10.2 lanes at 2034. In light of the current lack of a ten pin bowling facility within

²⁹ 'Tenpin Bowling', Mintel, May 2014

³⁰ 'Population Estimates for UK, England and Wales, Scotland and Northern Ireland: Mid-2014', Office for National Statistics, June 2015

the South Ribble administrative area, it appears that there is a theoretical capacity for additional lanes. However, the existing facility located nearby in Preston may, in practice, be able to meet demand. In this regard, we note that the Megabowl at the Capitol Centre has closed in recent years and, therefore, we believe that operator interest in bringing forward a facility in South Ribble is likely to be limited.

Table 8.7: Ten Pin Bowling Requirement in Study Area and South Ribble

Year	Study Area Population	Typical Population Required to Support One Ten Pin Lane	Potential Number of Ten Pin Lanes Supported in Study Area	Study Area Population Custom Claimed by South Ribble	Potential Number of Ten Pin Lanes Supported in South Ribble
2017	215,521	11,500	18.7	111,491	9.7
2019	217,799	11,500	18.9	112,439	9.8
2022	220,042	11,500	19.1	113,819	9.9
2024	221,921	11,500	19.3	114,614	10.0
2029	225,112	11,500	19.6	116,128	10.1
2034	227,523	11,500	19.8	117,503	10.2

Note: Typical number of persons required to support a bowling lane derived from Mintel Tenpin Bowling report of July 2014

Health and Fitness Centres

- 8.24 In the health and fitness sector, the number of local authority owned leisure centres and swimming pools has generally increased in the past few years, although with reductions to their sport and leisure funding budgets local authorities are increasingly being required to adopt more commercial approaches. Mintel³¹ records that, at June 2015, 33% of adults were found to use a local authority owned health centre or swimming pool. This is a reduction from the figure of 40% recorded in 2013, although operator data suggests that admissions have remained resilient overall, pointing to losses being concentrated around more casual users (who visit less often). The replacement of aging facilities to allow local authority facilities to continue to compete with private facilities remains a key challenge.
- 8.25 Research by the Leisure Database Company³² indicates that the private health and fitness sector had a market value of approximately £3.9 billion in March 2012, an increase of 1.5% over the previous twelve month period. Mintel³³ also notes that, whilst only 12% of adults currently use a private health and fitness club, the potential for a further expansion of the

³¹ 'Leisure Centres and Swimming Pools', Mintel, September 2015

³² 'State of the UK Fitness Industry', The Leisure Database Company, June 2013

³³ 'Health and Fitness Clubs', Mintel, July 2015

market remains strong. Perhaps unsurprisingly the 16 to 24 and 25 to 34 age groups have the highest participation rates, with 19% and 18% respectively of the population within these age groups visiting private health clubs, with participation dropping off quickly within older age groups.

- 8.26 The composition of the private health and fitness sector has experienced great change in recent years with the rise of budget gym operators presenting a challenge to the more established key players. Mintel¹² indicates that the market has expanded significantly with a shift towards budget operators bringing possibilities for more convenient access and affordability for the customers. Budget operator Pure Gym has expanded to become the market leader both in terms of number of members (520,000) and clubs (99), more than doubling the size of its estate between 2012 and 2013. At the same time Pure Gym's main competitor, The Gym, has also greatly increased its membership (350,000) and number of clubs (63). David Lloyd Leisure and Virgin Active Group remain the largest 'full service' health club chains with 440,000 and 400,000 members respectively. Mintel has predicted 6% growth for the private sector health and fitness market up to 2018, to reach a value of £2.8 billion in 2020.
- 8.27 Looking at the household survey data relating to the current preferences in terms of health and fitness centres across the Study Area, the below Table 8.8 sets out the most popular destinations. The table demonstrates that Leyland Leisure Centre and Bamber Bridge Leisure Centre are jointly the most popular destinations for health and fitness trips within the Study Area, both attracting 10.5% of the total trips. The Leyland Leisure Centre is the most popular destination for residents in Zone 1 and the Bamber Bridge Leisure Centre is the most popular destination for residents in Zone 2. The top four destinations in Table 8.8 below are all located within the South Ribble administrative area.

Table 8.8: Principal Health and Fitness Destinations in the Study Area

Zone	Address	1	2	3	4	5	6	7	8	Total
1	Leyland Leisure Centre, Preston	33.5%	15.9%	0.0%	4.9%	0.0%	3.4%	1.9%	7.6%	10.5%
2	Bamber Bridge Leisure Centre	13.4%	25.4%	1.8%	0.0%	43.9%	1.2%	0.0%	0.0%	10.5%
2	South Ribble Tennis & Fitness Centre, Cuerden Way	9.8%	4.2%	6.3%	0.0%	16.4%	10.1%	0.0%	0.0%	6.0%
1	Gymetc, King Street, Leyland	15.0%	4.3%	0.0%	8.9%	0.0%	1.2%	9.4%	0.0%	5.0%
7	West View Leisure Centre, Preston	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	29.9%	4.6%
2	Virgin Active, Capitol Centre	3.6%	4.3%	6.4%	8.9%	10.4%	3.0%	0.0%	4.2%	4.4%

8.28 We consider South Ribble to be well served by public and private leisure facilities. There is a good selection of local authority run leisure centres (in Bamber Bridge, Leyland and Penwortham), along with a range of private membership gyms such as the Fit4Less in Walton-le-Dale and the Nuffield Health at the Capitol Centre. However, there does appear to be a lack of the 'top' budget gyms such as Pure Gym and The Gym, plus a lack of variety in terms of the 'top' health club such as Virgin Gyms and David Lloyd.

8.29 However, from an audit of available facilities, it appears that provision is appropriately distributed throughout South Ribble's key settlements and, as such, South Ribble appears to be relatively well provided for in terms of indoor health and fitness facilities.

8.30 Accordingly, whilst there does not appear to be a pressing need to allocate additional land for such leisure uses, it is considered that proposals for new indoor sports, health and fitness provision should be considered positively, provided that they are in accordance with the provisions of the development plan and national planning policy.

Food and Drink

8.31 Consumer spending on eating out through visits to restaurants and takeaways is recognised as a sector which has performed well during the economic downturn. Mintel³⁴ identifies that the eating out market grew by around 9% between 2013 and 2015, to an estimated £34 billion, and predicts that the market will continue to experience growth, estimated at approximately 17% in the period up to 2019. The emergence into the restaurant market of multiple new

³⁴ 'Eating Out Review', Mintel, June 2015

specialist operators, many with significant plans for expansion has increased opportunities for landlords to provide a diverse and distinct food offer.

- 8.32 A recent report by Savills³⁵ entitled 'Casual Dining in the UK' has found that casual dining brands in the UK, which operate from under 25 sites, such as Wahaca and Cau, have grown by 39% over the past three years. The report identifies that such dining brands, in combination, have opened 489 new outlets across the UK. This emphasises the popularity and growth of smaller chains, a trend which has led to increased diversity and consumer choice across the sector. During the same time period brands providing a larger number of outlets such as Pizza Express, Prezzo and Nandos, have grown by 13%. In terms of the casual dining market as a whole, Savills identifies that 80% is made up of brands with fewer than 25 restaurants. The Savills report also identifies that there has been growth in different cuisines, with North American, Caribbean and Thai cuisines increasing in popularity.
- 8.33 Within the public house (licensed) sector, despite significant pub closures in recent years, there is reason for optimism within this sector. The introduction of a market rent-only option for many tenants in 'tied' agreements with the large pub companies looks set to lead to significant change³⁶. Visitor numbers have been found to be stable, with the industry expected to experience modest growth in the period to 2019. Mintel identifies that some 64% of adults visited a pub or bar in 2014/15 for a drink, with the 18 to 24 age group found to be most likely to drink in pubs or bars on a weekly basis. The cask ale market in particular is reported to have grown by 29% since 2010³⁷. Nevertheless, a quality food offer has become increasingly important within the sector, as the contribution which food sales makes to pub revenues has increased steadily over a prolonged period.
- 8.34 In terms of the existing food and drink provision within South Ribble's defined centres, the only venue that accommodates national multiple food and beverage operators is the Capitol Centre. This destination accommodates Starbucks, Frankie and Benny's, Prezzo and McDonalds. As such, across the whole Study Area, the principal destination for restaurant visits is Preston city centre, which attracts 29.5% of all visits. However, within Zone 1, the principal destination is Leyland town centre, which attracts 44.4% of the trips from residents in that zone, demonstrating that residents generally prefer to visit the independent restaurant operators within Leyland town centre, instead of travelling further afield to Preston city centre.

³⁵ Casual Dining in the UK, Savills, June 2016

³⁶ 'Pub Visiting' Mintel, May 2015

³⁷ 'The Cask Report 2015-16', Cask Matters, September 2015



8.35 Overall, however, the draw of the range and nature of the restaurant operators in Preston city centre is substantial and therefore high proportions of available restaurant leisure expenditure from the Study Area is being spent in Preston city centre. Whilst Preston is always likely to be a popular destination for such trips, we believe that there may be potential to accommodate additional food and drink operators in the Borough's centres and that to do so may have some indirect benefits for other operators. Accordingly, we recommend that proposals for such uses be dealt with in a positive and proactive manner (taking into account town centre policy requirements).

9.0 Key Findings and Policy Recommendations

Key Findings: Retail Need

- 9.01 The retail floorspace requirements identified by this Study, which we summarise below are of some relevance to the determination of future planning applications for new retail floorspace in the Borough, particularly development which seeks to meet local needs. However, whilst the identified level of quantitative need has some relationship to the test of impact, it is necessary to be mindful that 'need' is no longer a direct planning test. Accordingly, the identified floorspace requirements should not be considered a 'cap' on appropriately located development. For example, there may be occasions where a localised need for a limited quantum of retail floorspace arises from residential-led development proposals (and therefore could appropriately form part of the development mix). In all cases, proposals for additional retail floorspace should be assessed against the relevant policies of the NPPF and the development plan.
- 9.02 As identified at Section 7, we identify a very significant expenditure deficit which indicates that there will be no quantitative requirement for additional convenience goods facilities throughout the period to 2034. As summarised below at Table 9.1, this deficit is further increased when account is taken of extant commitments. Accordingly, we do not believe that the Council needs to plan for the provision of additional convenience goods floorspace over the forthcoming plan period.

Table 9.1: Quantitative Need for Convenience Goods Floorspace in South Ribble Borough

	2017 (sq.m)	2019 (sq.m)	2021 (sq.m)	2022 (sq.m)	2029 (sq.m)	2034 (sq.m)
Minimum Convenience Goods Requirement	-3,300	-3,300	-3,100	-3,000	-2,900	-2,600
Maximum Convenience Goods Requirement	-6,100	-6,100	-5,700	-5,600	-5,400	-4,900

- 9.03 Notwithstanding this, we are aware that certain existing foodstores – most notably discount operators – trade very successfully, and that there will likely be additional requirements as a consequence of the success of these retailers. This is exemplified by the current Cuerden Investment site application, which includes a discount foodstore as part of the significant retail offer proposed for the site. In addition, we are also aware of the extant permission to bring forward a food superstore at Penwortham.

South Ribble Retail and Leisure Study

9.04 In terms of comparison goods, we identify a requirement for between 2,900 sq.m and 4,800 sq.m of additional new comparison goods sales floorspace in the period to 2034. It should be noted that this requirement is based on the maintenance of South Ribble's current comparison goods market share, which is partly based on the success of the Capitol Centre and its strong clothing and footwear offer. Accordingly, if the Council was in a position where it needed to consider the land use requirements arising from the identified requirement, it may be appropriate to consider whether some of the identified need could be accommodated in Preston city centre (in accordance with 'town centre first' principles).

Table 9.2: Quantitative Need for Comparison Goods Floorspace in South Ribble Borough

	2017 (sq.m)	2019 (sq.m)	2022 (sq.m)	2024 (sq.m)	2029 (sq.m)	2034 (sq.m)
Minimum Convenience Goods Requirement	-5,400	-5,700	-4,400	-3,100	-400	2,900
Maximum Convenience Goods Requirement	-9,000	-9,400	-7,300	-5,200	-600	4,800

9.05 In actuality, there is the potential for comparison goods needs to be met as a consequence of proposals which are currently with the Council as live planning applications.

9.06 The Council is in the process of considering the large scale application which provides for the redevelopment of the Cuerden Investment site, which provides for circa 67,000 sq.m of gross floorspace, the large majority of which would accommodate comparison goods retailers. The scale of the Cuerden proposal is such that it would draw trade from a relatively wider area, and meet needs which arise further afield than South Ribble. Notwithstanding this, if planning permission were to be granted for the Cuerden development, we believe it to be clear that this would extinguish any limited quantitative requirement for additional comparison goods floorspace in the area for the foreseeable future. It is appropriate to reiterate that the findings of this Study do not provide a 'cap' on floorspace which precludes the grant of planning permission for an appropriate development at Cuerden. Instead, the Cuerden application proposal should be judged on its own merits, giving appropriate consideration to key town centre policy tests and the catchment that the Cuerden proposal would serve.

Key Findings: Leisure Need

9.07 Our findings in respect of commercial leisure need are relatively straightforward. We believe that the existing cinema and bingo facilities are appropriate to meet needs which arise in the Study Area. Whilst our assessment suggest that there may be some localised need for a ten pin bowling facility in South Ribble Borough, we are aware that such uses are generally in

decline (except in city centre locations), and that the Megabowl at the Capitol Centre closed a number of years ago, with the site becoming Waitrose. As such, we do not consider it likely that there will be genuine market interest in bringing forward another ten pin bowling alley within the Borough.

- 9.08 Our assessment of the health and fitness sector indicates that South Ribble appears to be well served by a range of public and private leisure facilities which are distributed throughout the area. Whilst we anticipate that particular national multiple operators may wish to open further facilities in the Borough, we do not consider that there is a particular need which needs to be addressed through the development plan process. Accordingly, any such proposals should be judged on their own merits in accordance with relevant town centre policy.
- 9.09 A similar position is evident in respect of the food and drink sector. Whilst the Borough's centres typically accommodate few national multiple food and drink operators, this is largely a consequence of the Borough's proximity to Preston and to out of centre retail parks, including the Capitol Centre. Such locations typically comprise attractive locations for large food and drink operators. We do not believe that this is likely to change in the future, and note that the proposed Cuerden scheme does provide significant food and drink floorspace, which may further add to the choice available in the Borough (subject to the application being granted planning permission).

Policy Recommendations: Defined Centre Boundaries

- 9.10 A series of recommendations are provided at Appendix 4 in respect of appropriate boundaries for Leyland town centre and the district centres of Bamber Bridge, Longton, Penwortham and Tardy Gate. We recommend that Leyland town centre is the subject of defined shopping frontages, a primary shopping area and wider town centre boundary. Given their smaller size and lesser reliance on Class A1 retail, we recommend that the district centres are defined by way of a town centre boundary only.
- 9.11 Our recommended boundaries are provided at Appendix 4. We set out the rationale for our recommendations below, with reference to the existing boundaries identified at Appendix 3 of the adopted South Ribble Local Plan.
- **Leyland Town Centre**
We recommend only minor amendments to the Leyland town centre boundary, principally relating to the area to the north of Hough Lane where we recommend omitting the factory on Quin Street. In respect of the existing primary shopping area, we believe that

there is scope to extend it further to the east to accommodate all of the retail units on Hough Street. We recommend that units within the existing primary shopping area form Leyland's primary retail frontages, whilst units within the recommended primary shopping area extension form the secondary retail frontages.

- **Bamber Bridge District Centre**

Our analysis indicates that there are currently 37 commercial units located outside but proximate to the existing district centre boundary. Whilst some of these units are located in a sporadic manner, we believe that there is the opportunity for the centre boundary to be extended to the north to accommodate uses which function as part of the centre in practice.

- **Longton District Centre**

We recommend that the existing Longton District Centre boundary is extended to the east to incorporate additional retail units located at the Liverpool Road, Chapel Lane and School Lane intersection that are omitted from the existing boundary. We recommend excluding the Chapel Lane MOT garage, which falls under the sui generis use class.

- **Penwortham District Centre**

We recommend that the existing Longton district centre boundary is extended to the north-east to incorporate the existing retail units on Priory Lane, and to the east to incorporate office and retail service uses. We believe that the proposed revision incorporates main town centre uses which function as part of the centre in practice. Should the Tesco foodstore proposal be granted planning permission and come forward, consideration could be given in the future as to whether this site would function as part of the centre.

- **Tardy Gate District Centre**

We note that Tardy Gate library is currently omitted from the district centre boundary and we recommend that that boundary is extended to the south-east in order to rectify this. We also believe that there is potential to extend the boundary to accommodate the Co-operative foodstore which was being built out at the time of our survey of the centre.

Glossary of Terms

Capacity	Retail capacity in terms of this report refers to surplus/deficit of expenditure (£m) which represents the difference between the expenditure and turnover of the identified facilities.
Comparison Goods	Comparison goods relate to items not obtained on a frequent basis, these include clothing, footwear, household and recreational goods. A more detailed breakdown of comparison goods categories is provided below.
<i>Chemist Goods</i>	<i>All consumer retail expenditure on prescription and non-prescription drugs, adhesive and non-adhesive bandages, first-aid kits, hot-water bottles, toilet shops, sponges, and so on.</i>
<i>Clothing & Footwear</i>	<i>All consumer retail expenditure on shoes and other footwear, garments for men, women, children and infants either ready-to-wear or made-to-measure, underwear, ties, handkerchiefs, scarves, and so on.</i>
<i>DIY Goods</i>	<i>Includes all consumer expenditure on hardware, DIY, decorators' supplies and garden centre type goods. This category includes products such as hammers, saw, screwdrivers, wallpaper, plumbing items, floorboards, ceramic tiles, plants, pots, turf for lawns, and so on.</i>
<i>Electrical Goods</i>	<i>All consumer retail expenditure on domestic electrical and gas appliances, such as washing machines, dryers, dishwashers, ironing and press machines, cookers, freezers and fridge-freezers, coffee makers, radios, televisions, DVD players, and so on.</i>
<i>Furniture Goods</i>	<i>Includes all consumer expenditure on furniture, floor coverings and household textiles such as beds, sofas, tables, cupboards, bed linen, curtains, towels, lamps, mirrors, and so on.</i>
<i>Household Goods</i>	<i>Includes household textiles and soft furnishings, china, glassware, jewellery and other miscellaneous goods such as greeting cards, notebooks, pens, pencils, and so on.</i>
<i>Recreational Goods</i>	<i>All consumer retail expenditure on bicycles and tricycles (excluding toy bicycles), musical instruments, sports equipment, camping equipment, toys of all kinds including dolls, soft toys, and so on.</i>
Convenience Goods	Convenience goods relate to everyday essential items including confectionary, food, drinks, newspapers and magazines.

Borough centre	Borough centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.
Expenditure Per Capita	The average spend of each person within the defined Study Area on a variety of retail goods.
Expenditure	Expenditure is calculated by taking the population within a defined area and then multiplying this figure by average annual expenditure levels for various forms of goods.
Expenditure Forecasts	This assessment has been undertaken using the 'goods based' approach as prescribed in the Planning for Town Centres Practice Guidance. Retail expenditure forecasts have been derived from Experian Retail Planner Briefing Note 12.1 (October 2014).
Experian (MMG3)	The database used to identify population, expenditure and socio-economic breakdown of the Study Area population.
Gross Floorspace	Represents the level of total floorspace or footprint of a specific development (i.e. sales area, storage, checkouts, café, display, and so on).
GOAD Plans	Provide accurate information on the composition of town centres, shopping areas, out-of-town retail parks and outlet villages in the UK. Identifies the fascia name, retail category, floorspace, and exact location of all retail outlets and vacant premises.
GOAD Reports	Provide a snap-shot of the retail status or demographic make-up of Goad surveyed town centres. Provides a comprehensive breakdown of floorspace and outlet count for all individual trade types in the Convenience, Comparison, Retail Service, Leisure, Financial/Business Services and Vacancy sectors.
Local	Centre Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a local centre.
Net Floorspace	Represents the level of internal area devoted to the sale of goods.

Market Share	Market shares derived from the household survey results, which are based on either the proportion of shopping trips or the proportion of expenditure attracted to a particular centre/facility.
National Multiple	This is defined as a retail or service operator which is or part of a network of nine or more outlets.
Price Base	The price base for the Study is 2015; all prices are or have been adjusted to 2013 in order to be consistent.
Rates of Productivity	This takes into account the potential for existing retail floorspace to improve their turnover productivity (e.g. smaller goods could be sold from a smaller area for more money, increased opening hours, etc.).
Sales Density	Retail capacity figures are expressed in term of floorspace, relying on the application of assumed sales density figures to the surplus expenditure identified. This is based on the typical turnover of a store by square metre/foot.
Special Forms of Trading	Defined by Experian as expenditure not directed to traditional floorspace such as the internet, mail order, party plan and vending machines and other non-store activity such as market and road-side stalls.
Study Area	This represents the household survey area, which is based on postal sectors.
Trade Draw	This refers to the level of trade attracted to a particular facility/centre from a particular area.
Turnover	The turnover figure relates to the annual turnover generated by existing retail facilities.
Town Centre	A town centre will usually be the second level of centres after town centres and, in many cases, they will be the principal centre of centres in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability.