



Chorley Retail and Leisure Study

Final Report

Chorley Borough Council

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Prepared on behalf of WYG Environment Planning Transport Limited.

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Contents

- Executive Summary 1
- 1.0 Introduction7
 - 1.1 Instruction 7
 - 1.2 Structure of Report..... 9
- 2.0 Planning Policy 10
 - 2.1 National Planning Policy10
 - 2.2 Local Planning Policy13
 - 2.3 Chorley Local Plan 2012-202615
 - 2.4 Chorley Town Centre Masterplan16
- 3.0 Retail and Leisure Trends 18
 - 3.1 Introduction18
 - 3.2 Polarisation and the Decline of Secondary Centres.....18
 - 3.3 Independents and Markets.....21
 - 3.4 The End of the 'Big Four Space Race' and the Rise of the Discounter22
 - 3.5 Special Forms of Trading24
 - 3.6 Leisure and the Appetite for Additional Food and Drink.....27
 - 3.7 Influential Reports28
 - 3.8 Expenditure in Chorley30
 - 3.9 Implications for Chorley32
- 4.0 Summary of Health Check Findings 36
 - 4.1 Introduction36
 - 4.2 Sub-Regional Retail Context38
 - 4.3 Overview of Chorley Town Centre.....39
 - 4.4 Health Checks of Chorley’s District and Local Centres48
- 5.0 Original Market Research..... 60
 - 5.1 Introduction60
 - 5.2 Household Survey.....60
 - 5.3 Study Area61
 - 5.4 Assessment of Retail Shopping Patterns.....63
 - 5.5 Convenience Goods Shopping Patterns66
 - 5.6 Comparison Goods Shopping Patterns.....71



- 5.7 Customer Behaviour80
- 6.0 Population and Expenditure 84
 - 6.1 Introduction84
 - 6.2 Study Area Population84
 - 6.3 Retail Expenditure85
 - 6.4 Convenience Goods Expenditure.....87
 - 6.5 Comparison Goods Expenditure89
- 7.0 Retail Capacity in Chorley Borough 91
 - 7.1 Introduction91
 - 7.2 Capacity Formula.....91
 - 7.3 Future Capacity for Convenience Goods Floorspace92
 - 7.4 Future Capacity for Comparison Goods Floorspace.....99
 - 7.5 Qualitative Need104
- 8.0 Assessment of Leisure Needs 109
 - 8.1 Introduction109
 - 8.2 Participation Rates.....111
 - 8.3 Bingo.....113
 - 8.4 Cinema115
 - 8.5 Ten Pin Bowling117
 - 8.6 Health and Fitness Centres.....120
 - 8.7 Food and Drink.....123
 - 8.8 Other Leisure Uses125
- 9.0 Summary of Findings and Recommendations..... 126
 - 9.1 Introduction126
 - 9.2 Key Findings: Quantitative Need128
 - 9.3 Key Findings: Qualitative Need129
 - 9.4 Key Findings: Commercial Leisure.....131
 - 9.5 Town Centre Strategy and Allocations.....133
 - 9.6 Policy Recommendations: Defined Centre Boundaries138
 - 9.7 Recommended Local Impact Threshold142
- Glossary of Terms 148



Appendices

Appendix 1. Study Area Plan

Appendix 2. Experian Goad Classification of Retail and Service Uses

Appendix 3. Chorley Town Centre Health Check

Appendix 4. Chorley Town Centre Diversity of Use, Vacancy and Boundary Plans

Appendix 5. Local and District Centre Health Checks

Appendix 6. Local and District Centre Diversity of Use Plans

Appendix 7. Household Survey Questionnaire and Results

Appendix 8. Quantitative Assessment

Appendix 9. Gap Analysis Plans of Chorley

Executive Summary

Introduction and Background

1. WYG was commissioned by Preston and Chorley Councils in 2018 to undertake a Retail and Leisure Study covering both administrative areas and the wider Central Lancashire Region. A separate Retail and Leisure Study has already been prepared by WYG on behalf of South Ribble Council in 2017.
2. The Study will act as an evidence base to assist in the formulation of future development plan policy within the new Central Lancashire Local Plan (CLLP).
3. The Study draws on new empirical research in the form of a telephone survey of 1,800 households across the defined Study Area, which comprises 16 separate zones covering Preston and Chorley authority areas and parts of the surrounding authority areas of Wyre, Blackburn and Fylde. The Study draws on the recommendations and strategy as set out in the previous evidence base documents, along with the policies and guidance as set out in the current development plan for Preston.

Vitality and Viability

4. The Retail and Leisure Study includes a review of Chorley's town, district and local centres as defined within the current Chorley Local Plan (2015). The purpose of the review of the defined centres was to assess their overall vitality and viability using the health check indicators set out in national planning policy guidance, along with providing sufficient information to enable WYG to provide recommendations with regard to their current designations and the current defined town centre boundaries and primary shopping areas.
5. The review of Chorley town centre identified a range of strengths and weaknesses and set out a series of opportunities and threats in planning for the future for the town centre. In particular, WYG identified that there is good national multiple retailer representation and a strong independent offer. The overall environmental quality is good, with good parking provision and CCTV coverage across the centre. However, we also identified that the quality of some of the comparison retail goods offer is somewhat low, seemingly focused on low budget or non-branded goods and that there is an absence of medium to large format commercial units and an absence of a large-scale leisure venue such as a cinema or ten-pin bowling facility. Furthermore, the vacancy rate is recorded to be above the national average, although the majority of this vacant stock is represented by small scale units.

6. However, it was recognised that the delivery of the Market Walk scheme, alongside other key redevelopment schemes within the town centre and aesthetic improvements, will help to draw residents back into the town centre who would have otherwise travelled out of the Borough to meet their retail and leisure needs. Furthermore, WYG recognised the opportunities to improve the legibility and connectivity in the streets which run in an east-west alignment, and particularly from the railway station, to pull shoppers into the 'heart' of the centre.

Market Share

7. A key requirement of this Study is the detailed understanding of shopping behaviour in respect of both convenience and comparison goods. To this end, WYG commissioned specialist market researchers NEMS to undertake a telephone survey of households to identify consumers' habits and preferences in the Study Area. The household survey enables us to identify the market share claimed by specific retail destinations (that is, the number of trips to, or expenditure at, a particular destination as a proportion of the total number of trips, or total expenditure), 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.
8. The undertaking of original market research enables an in-depth analysis of shopping behaviour at a local level, and allows for the evaluation of the retail turnover and trade draw of particular 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.

Convenience Goods

9. Existing facilities within the Chorley Local Authority Area attract a market share of 21.6% (£237.1m) of the total £1,096.1m of convenience goods expenditure generated by residents of the Study Area. Some 24.1%¹ of the total population within the Study Area is resident within Chorley. As noted above, we typically expect the convenience goods shopping needs of residents to be met locally and would expect the overall market share of destinations in Chorley to be comparable to the proportion of the Study Area population resident within this area. This is due to residents generally shopping locally (i.e. within a five minute drivetime) to meet their convenience shopping needs. The market share of 21.6% therefore appears

¹ Derived from 2018 population projections sourced from Experian Micromarketer G3 data.

broadly consistent with the proportion of the Study Area's population which is located within Chorley Borough.

Comparison Goods

10. A total of £181.9m of comparison expenditure is retained within Chorley Borough, which equates to 12.9% of the total available expenditure across the Study Area. A further £875.2m is spent at destinations within the Study Area but outside of Chorley Borough. Of the expenditure attracted to destinations within the Borough (£200.9m), 51.0% of this, or £102.6 is spent in Chorley town centre and a further 12.3%, or £24.5m is spent at Tesco Extra on Ackhurst Industrial Park.

Quantitative Retail Capacity

11. Based on the current retention rates within the Borough, we do not identify a quantitative requirement for any additional convenience goods floorspace within Borough's catchment up to 2036 once existing commitments are considered.
12. In terms of comparison goods floorspace requirements, again based on a constant market share across the Borough, we do not identify any quantitative capacity for additional comparison goods floorspace across the Study Area.
13. The principal reason for the lack in any identified capacity for additional comparison floorspace is the presence of the extant commitments both within and outside of the Borough, including the committed floorspace at Botany Bay, the committed floorspace at Market Walk and the floorspace associated with Cuerden Investment Site, from which a proportion of the trade (estimated by WYG to be approximately 15% based on trade draw figures adopted by the applicant and accepted by Chorley's retail planning advisor) is estimated to be drawn from Chorley's administrative area. The total comparison turnover of the commitments expected to be drawn from Chorley's administrative area is £67.7m, which is a substantial quantum of expenditure which is expected to be drawn from residents in Chorley. Indeed, the Market Walk scheme is expected to have a comparison turnover of approximately £9.6m, of which we assume 80% will be drawn from residents in Chorley (particularly given that we expect Market Walk to have a wider draw following completion of the extant scheme), which represents over 14% of the total turnover of the commitments. However, it has to be acknowledged that the Market Walk scheme will add to the overall turnover and vitality and viability of the centre once completed.

14. Based on the above, we have not identified any quantitative capacity for additional comparison floorspace within the Borough of Chorley following commitments, but it is important to acknowledge the importance that the Market Walk scheme will have in meeting local residents' leisure and retail requirements within the town centre, along with drawing visitors back into the centre from further afield.

Qualitative Capacity

15. In assessing the potential qualitative need for additional retail provision, whilst this is a more subjective matter, there are important factors to consider when reviewing the existing provision within the administrative area. Issues such as 'gaps' in existing provision, ensuring that communities have easy access to retail facilities and that there is a range of operators to provide choice to residents, along with location specific needs such as higher levels of deprivation, all need to be taken account of when assessing the qualitative need.

Convenience Provision

16. Looking at the existing convenience provision across Chorley's administrative area, we have identified the following two potential gaps in convenience provision:
 - A potential qualitative requirement for an additional convenience facility within Zone 13 and particularly within Adlington to meet the main food deficiency identified within the analysis in the Study. We note that the 2015 Local Plan adopted an extended town centre boundary to support the development of a supermarket/appropriate retail uses, with additional Class D1 and D2 Uses at first floor level within Market Street, Adlington. We have recommended that this boundary is again retracted given the lack of progression of a site since the previous local plan, and we do not recommend that a site is allocated specifically to meet this qualitative deficiency. This however, would not jeopardise a store coming forward on the edge of the local centre, or indeed elsewhere in the Zone should an appropriate scheme come forward, but does provide additional control to the Council over the protection of the existing commercial uses in the centres.
 - A potential gap in provision surrounding Eccleston local centre, where residents are served principally by the Sainsbury's Local which does not offer a sufficient range of goods to cater for residents' main food shopping requirements. Reviewing the existing shopping patterns, a high proportion of residents from Zone 11 are travelling to Zone 10 (Central Chorley) to meet their main food shopping needs, with the principal store

being the Tesco Extra at Ackhurst Industrial Park, which is located approximately 13 minutes away by car. Providing a mid-format foodstore (between 500 and 1,500 sq.m) within Eccleston would assist to reduce the distance residents have to travel to meet their main food shopping needs.

Comparison Provision

17. Turning to the qualitative need for additional comparison floorspace, we focus principally on Chorley town centre in the Study, which is the most likely to attract interest from retail operators in the comparison market.
18. The Study recognises that the town centre lacks in what could be classed as an 'anchor' department store style operator but it is acknowledged that whilst historically these were the types of operators which would traditionally form part of town centre regeneration schemes, we are no longer working in the same commercial market, and therefore schemes of this nature are no longer common within the UK.
19. Instead, local authorities and private landowners are having to explore alternative town centre development options to regenerate key sites, including meeting residential requirements and a wider emphasis on providing something 'different' to traditional town centres uses. Whilst retail, leisure, service and community uses are still the heart of a centre and invaluable in terms of helping to make a town centre successful, the successful centres across the UK are those which are drawing in visitors and residents for other reasons.
20. The Market Walk scheme will deliver new, modern format floorspace to attract operators. The mixed-use commercial scheme will bring a six screen cinema, M&S Foodhall which will include a click & collect facility for wider M&S products and additional floorspace for other retail and leisure operators. The scheme, whilst not technically delivering a large format anchor comparison retailer, will deliver other operators to draw shoppers and visitors into the centre, and increase the dwell time.

21. Leisure Capacity

22. In terms of 'traditional' commercial leisure uses (bingo halls, cinemas and ten-pin bowling facilities) we have identified that there is a requirement for a ten-pin bowling facility and cinema facility within the Borough. There are no ten-pin bowling facilities or cinema screens within Chorley Borough (see paragraph 20 above).

23. There may be the potential for an additional bowling facility within Chorley, but due to the current market and general lack of investment and decline in this sector, operators may not be forthcoming. Discussions with commercial agents would be useful in this regard to establish if there was a market in Chorley for additional facilities and the potential for boutique style facilities which offer wider food and beverage opportunities too, encouraging longer stays and a more varied experience, particularly within the evening.
24. We acknowledge that the independent restaurant offer in Chorley town centre is relatively good, and that these operators should be protected moving forward through appropriate planning policy via the sequential and impact tests. The independent offer acts as a draw to the centre, offering a qualitatively different appeal for residents, and in assessing any competing edge or out of centre applications, the Council should give weight to the potential implications of alternative proposals on the independent offer, along with the national multiple offer.

Policy Recommendations

25. The Study provides a series of policy recommendations in accordance with the requirements of the National Planning Policy Framework. The policy recommendations have been made to assist the Council in protecting the established network of centres across the Borough, whilst being realistic that some previously defined centres no longer perform their expected roles in meeting local residents' retail, leisure and service needs. Indeed, the recommendations have also been made having regard to the fact that not all centres are the same, and their offer, size and general 'quality' vary considerably dependent on demographics and location. A summary of the proposed amendments to the defined centre boundaries is provided in the report and in the associated appendices. In addition, our recommendations made with regard to the deallocation of centres is also included.
26. One of the key recommendations made by WYG is to reduce the threshold which applies to retail impact assessments for developments located outside of defined centres. The current adopted policy for Chorley Borough does not provide a locally set threshold for impact assessments, referring back to the 2,500 sq.m (gross) threshold as applied in the NPPF. The issue with setting a high default threshold is that applicants do not need to undertake a formal assessment of impact on defined centres should their proposal fall below 2,500 sq.m, which the majority of proposals for new commercial floorspace will do. As such, based on a review of the existing stock of units in the centres, and the overall health of the centres, WYG has set out an alternative approach to adopting lower local thresholds within the new CLLP.



1.0 Introduction

1.1 Instruction

- 1.1.1 WYG Planning (hereafter referred to as 'WYG') was commissioned by Preston and Chorley Councils in July 2018 to undertake a Retail and Town Centres Study for both authority areas. The two studies for Preston and Chorley Councils will help inform the Central Lancashire Local Plan, alongside the South Ribble Retail Study produced in 2016, and updated in 2019.
- 1.1.2 Central Lancashire covers the three authority areas of Preston, Chorley and South Ribble, which functions as one integrated local economy and commuting area. It is a single housing market area which has high levels of self-containment and as such, it is appropriate for the three Councils to be working strategically in collaboration to ensure the policies are joined up and complementary. The three Councils have a long history of working together in partnership to produce local plans and deliver strategic objectives. The current Central Lancashire Core Strategy was adopted by the three Councils in July 2012, setting out the strategic planning policies for Central Lancashire, and is supported by the individual local plans produced by each Council in 2015. The three Councils collectively are now reviewing the 2012 Core Strategy and individual local plans, with the aim to deliver a single Central Lancashire Local Plan (CLLP) to reflect both the shared strategic policy objectives and more detailed non-strategic policies.
- 1.1.3 As such, the purpose of this Study is to assist in the preparation of the new CLLP, by providing the evidence base on retail and other main town centre use matters across the Central Lancashire Region.
- 1.1.4 The latest Central Lancashire Retail and Leisure Review was undertaken on behalf of the three local authorities of Preston, South Ribble and Chorley in March 2010 by GVA Grimley. The 2010 Study was supported by a household telephone survey of 1,600 households across the sub-region, which sought to establish household shopping habits and provided an assessment of the overall health of the defined centres within the Borough.
- 1.1.5 WYG has therefore been commissioned to undertake a new retail study to cover the Central Lancashire Region, providing an assessment of the future quantitative and qualitative capacity for additional retail and leisure floorspace, along with a review of the current health of the defined centres within Preston and Chorley. Our Study then provides the wider strategic recommendations with regard to defined centre boundaries, site allocations, future policy protection over the defined centres and local thresholds for impact assessments.

1.1.6 This Report provides the key findings associated with Chorley Borough, looking at the existing shopping patterns, available expenditure, health of the defined centres and overall policy recommendations. The economic recession which spanned the period 2008-2013 had a significant impact on many town centres and the UK retail and leisure sectors as a whole, and as such, the appraisal of these elements of the Study are of particular importance in guiding future development within the Borough. The approach adopted by WYG has been refined to reflect the latest Government guidance provided in the National Planning Policy Framework (NPPF) (July 2018) and National Planning Practice Guidance (NPPG) (2014).

1.1.7 The key purposes of the Study are as follows:

- An assessment of planning policy and market context;
- An audit of the role, vitality, viability of centres in Chorley;
- An assessment of need for retail and main town centre uses for the period up to 2036;
- Assessment of the capacity for town centres in Chorley to accommodate retail and town centre uses, supported as necessary by site by site assessment / proformas; and
- Recommended boundaries for town, district and local to be designated in the Local Plan.

1.1.8 In order to address the above requirements, the Study draws on new empirical research, with NEMS Market Research Limited ('NEMS') undertaking a survey of 1,800 households within the defined Study Area in July and August 2018.

1.1.9 The Study Area for the household survey comprises a total of 16 zones which cover Chorley, Preston and South Ribble's administrative areas.

1.1.10 In terms of Chorley's administrative area in particular, Zones 10 (Central Chorley), 11 (Eccleston and Euxton), 12 (Whittle-le-Woods and North West Chorley) and 13 (Adlington) are all located within the Borough's boundary, with parts of Zones 8 (Leyland) and 9 (Croston and South West South Ribble) also covering the administrative area. As such, it will be these zones which we concentrate on in detail as part of this Study, looking particularly at the shopping patterns of residents located within Chorley Borough. We also look at the wider shopping patterns within the Study Area as a whole.

- 1.1.11 This Study also draws on the most recent Experian population and expenditure data (published in December 2018) in order to establish the most up-to-date position with regard to both convenience and comparison goods capacity.

1.2 Structure of Report

1.2.1 Our report is structured as follows:

- Section 2 considers local and national planning policy of relevance to retail and town centre matters;
- Section 3 provides a context for the Study through the analysis of key retail and leisure trends;
- Section 4 considers the vitality and viability of Chorley town centre and the Borough's defined district and local centres;
- Section 5 provides a review of the results of the household survey undertaken by NEMS Market Research in July and August 2018;
- 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 sets out our assessment of commercial leisure needs within the Borough and the wider Study Area; and
- Section 9 provides our overall policy recommendations with particular regard to future capacity in the Borough, defined centre boundaries and local impact thresholds.

2.0 Planning Policy

2.1 National Planning Policy

National Planning Policy Framework

- 2.1.1 The National Planning Policy Framework (NPPF) was originally published in March 2012 and revised in July 2018. The main theme of the NPPF is the 'presumption in favour of sustainable development' where plans should seek opportunities to meet the development needs of their area and be sufficiently flexible to adapt to rapid change.
- 2.1.2 Paragraph 80 establishes that significant weight should be placed on the need to support economic growth and activity, taking into account both local business needs and wider opportunities for development.
- 2.1.3 Section 7 of the NPPF seeks to ensure town centres remain at the heart of communities and establishes a town centre first approach to retail and main town centre use development.
- 2.1.4 Paragraph 85 specifically sets out that planning policies and decisions should support the role that town centres play by taking a positive approach to their growth, management and adaptation: more specifically, planning policies should:
- Define a network and hierarchy of centres and promote their long term vitality and viability through allowing them to grow and diversify in a way that can respond to rapid changes in retail and leisure industries
 - Define the extent of town centres and primary shopping areas, and make clear use of the range of permitted uses in these locations as part of a positive strategy for the future of each centre;
 - Retain and enhance existing markets and introduce new ones, where appropriate;
 - Allocate a range of suitable sites to meet the scale and type of development likely to be needed, looking forward over a ten-year period, in order to meet anticipated retail, leisure, office and other main town centre uses. In order to ensure these uses are not compromised due to a lack of available sites, town centre boundaries should be kept under review, where necessary;
 - Where suitable and viable town centre sites are not available for main town centre uses, planning policies should allocate appropriate edge of centre sites which are well

connected to the centre. If sufficient edge of centre sites cannot be identified, policies should explain how identified needs can be met in other accessible locations that are well connected to the town centre; and

- Recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites.

2.1.5 Paragraph 86 requires local authorities to apply a sequential test to planning applications for main town centre uses which are neither in an existing centre nor in accordance with an up-to-date plan. The paragraph continues and sets out a town centre first approach to main town centre uses, then edge of centre sites. Out of centre sites should only be considered if suitable sites are not available or not expected to become available within a reasonable period. It is specified in Paragraph 88 that the sequential approach should not be applied to applications for small scale rural offices or small scale rural development.

2.1.6 Paragraph 87 states that when considering proposals for edge of centre proposals, there should be a preference given towards those which are well connected to the town centre. It also states that Local Authorities and applicants should demonstrate flexibility on aspects such as format and scale to ensure opportunities to utilise suitable town centre or edge of centre sites are explored fully.

2.1.7 Paragraph 89 indicates that local 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 threshold, the default threshold will be 2,500sqm.

2.1.8 Paragraph 90 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 an existing, planned or committed investment in a centre, it should be refused.

Ensuring the Vitality of Town Centres Planning Practice Guidance

2.1.9 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.

- 2.1.10 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 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.
- 2.1.11 Paragraph 003 of the Ensuring the Vitality of Town Centres Planning Practice Guidance indicates that such strategies should seek to address the following matters:
- the appropriate and realistic role, function and hierarchy of town centres in the area 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.
- 2.1.12 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.
- 2.1.13 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.

2.2 Local Planning Policy

2.2.1 The development plan for the Borough consists of the Central Lancashire Core Strategy (The 'Core Strategy') which was adopted in July 2012 and the Chorley Local Plan 2012-2026 (The 'Local Plan') which was adopted in July 2015. The Central Lancashire Core Strategy was jointly prepared by Chorley Borough Council, Preston City Council and South Ribble Council, therefore covering a wider area than the Local Plan. The relevant policies from development are summarised below.

Central Lancashire Core Strategy

2.2.2 The Core Strategy sets an overarching strategic objective for Chorley town centre to achieve its retail and leisure potential and ensure the district and local centres provide and cater to local needs.

2.2.3 Policy 1 seeks to focus growth and investment to central Preston, the Key Service Centres and Strategic Sites. The Policy also classifies Chorley as a Key Service Centre, a second-tier settlement within the wider plan area and the highest-ranking settlement within the Chorley Borough area. It also recognises and classes Buckshaw village as a Strategic Site. The policy also states that some growth will be encouraged in Urban Local Service Centres, those of which are all within Chorley Borough: Adlington, Clayton Brook / Green, Clayton-le-Woods (Lancaster Lane), Coppull, Euxton and Whittle-le-Woods.

2.2.4 Policy 3 relates to transport and connectivity and sets out a series of measures to improve this throughout the plan area. This includes:

- Improving pedestrian facilities with high quality designed paving schemes;
- Reducing the need to travel through locating development in accessible areas; and
- Managing car use through means such as monitoring and management of long and short stay car parks in Chorley town centre.

2.2.5 Policy 11 is the main policy relating to retailing and town centre uses. The policy establishes a retail hierarchy for the plan area which is as follows:

- City Centre: Preston
- Principal Town Centres: Leyland and Chorley
- District Centres: Bamber Bridge, Clayton Green, Longton, Penwortham and Tardy Gate, and those proposed at Buckshaw Village and Cottam.

2.2.6 It sets out that retailing and other town centre uses of a scale appropriate to the retail hierarchy and in sustainable locations will be supported, providing proposals respects the character of the centre including any special architectural and historic interest and assists in maintaining its existing retail function. The Policy states that retail and town centre uses will be delivered in the following ways:

- 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.
- Maintaining, improving and controlling the mix of uses in the existing District and Local Centres and proposed centres at Strategic Sites and Locations, so as to appropriately serve local needs.
- Focussing main town centre uses in the defined town centres.
- Supporting city and town centre development providing for tourists and visitors, particularly business-based tourism.

2.2.7 The Policy justification notes that Chorley town centre provides the greatest concentration of shops in the plan area outside of Preston city centre. It also notes Chorley is a contemporary market town containing a mixture of national retailers and specialist shops, but further investment is required with a focus on the food sector.

2.2.8 Policy 12 relates to cultural and entertainment facilities in the plan area. It recognises that culture has an important role in revitalising and regenerating towns and cities and that cultural and entertainment assets are an important factor in attracting visitors to an area. Specifically, the Policy seeks to:

- Provide for local cultural and entertainment requirements in Chorley;
- Protect existing cultural assets and help them adapt to new challenges;
- Promote public art and public realm enhancements in town centres, seeking developer contributions where appropriate; and
- Encourage cultural and heritage-based tourism and leisure facilities.

2.3 Chorley Local Plan 2012-2026

2.3.1 Policy EP5 allocates specific sites within Chorley town centre as suitable for retail development. These sites are:

- Flat Iron Car Park;
- Bolton Street / Pall Mall;
- 5-9 Gillibrand Street; and
- High Street / Cleveland Street.

2.3.2 Policy EP6 designates Chorley's Primary Shopping Area and the primary and secondary retail frontages. The Policy states that within the primary shopping area, proposals for A1 use classes will be permitted at ground and first floor levels. Use Classes A3 (restaurants and cafes), A4 (drinking establishments) and A5 (hot food takeaways) and, with the exception of properties on Market Walk, A2 (Financial and Professional services) will be permitted in circumstances where they do not adversely impact either individually or cumulatively the function, vitality and viability of the Primary Frontage.

2.3.3 The Policy also states that within the Secondary Frontage Area, retail and town centre uses will be permitted at ground floor level where they maintain or enhance the vitality of this area. This could include development proposals and changes of uses which promote the evening and daytime economy, provides for independent retailers that contribute to the overall vitality of the town centre and provides office and residential uses at first floor level. With regards to Use Class A5, these will be permitted where they do not adversely impact either individually or cumulatively, on the function, viability and vitality of the Secondary Frontage.

2.4 Chorley Town Centre Masterplan

2.4.1 Adopted in August 2013, the Masterplan sets out the future development of Chorley Town Centre, noting a series of opportunity sites and also establishes a framework for public realm enhancements. The Masterplan was updated in November 2016 following the approval of the Market Walk extension on part of the Flat Iron Car Park.

2.4.2 The Opportunity areas noted within are as follows:

- South Market Street / Fleet Street – seeks to redevelop the current car parks for either a mixture of residential and community-based facilities or solely residential along with public realm enhancements such as widening pavements, new public spaces and incorporating shared spaces at key junctions.
- Civic Quarter – focuses on the block bound by Market Street, High Street, Union Street and Cleveland Street and the surrounding civic uses, there is a desire to redevelop the block and surrounding street, introduce a new green space, reduce the width of the carriageway to allow for outdoor seating and re-orientate the built form to emphasise key views of heritage features
- Flat Iron Car park – notes the desire to create a new flexible space for use as an outdoor market and improve pedestrian connectivity to Union Street and the Bus Station. The Market Walk Extension is being developed on part of the Flat Iron car park. The remainder of the car park has been reconfigured to form 140 car park spaces.

2.4.3 The public realm framework establishes a set of key public realm projects within the town centre to transform individual street to facilitate pedestrian movement and social interaction, this would be achieved through creating a set of different street typologies which would include altering the design of the carriageway to include more pedestrian space.

2.4.4 Due to the changes underway within Chorley town centre associated with the Market Walk extension across part of the Flat Iron car park and the creation of the Youth Zone, the Council has also prepared a Car Parking Strategy and a Markets Strategy. The strategy sets out a series of measures and address the immediate issues relating to capacity and car parking pricing in the short term in light of future developments proposed in the town centre to ensure disruption is minimised. The Friday Street car park is now fully open providing 316 new spaces with up to three hours free parking.

2.4.5 The Market Strategy has been published by the Council to ensure that the important market facilities within Chorley town centre are appropriately integrated into the future plans for the



town centre and particularly the Market Walk expansion. As a result of the works to the Market Walk extension commencing, the Tuesday market has relocated to the streets of Chorley town centre. There are two main markets in Chorley. Chorley covered market, which makes up the heart of the town and operates five days a week and Chorley's Tuesday market, which is now located along the streets of Chorley town centre.

3.0 Retail and Leisure Trends

3.1 Introduction

- 3.1.1 This section summarises some of the key trends that have fuelled the changes in the retail sector over the last three decades, and the impact of these trends on the UK's town centres. It provides a commentary on the impact of the downturn in the economy since 2007 and the growth of internet retailing on consumer spending, retail development and retailers' business strategies. Drawing on the latest research it also describes how these trends may continue to shape changes in the future, and whether and how town centres can respond to help maintain and enhance their overall vitality and viability.
- 3.1.2 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.
- 3.1.3 In order to set out the wider context for the Study, we provide an overview of prevailing retail and leisure trends below, and summarise how these relate and could impact on Chorley Borough and particularly, Chorley town centre in the final section.

3.2 Polarisation and the Decline of Secondary Centres

- 3.2.1 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 other secondary destinations (particularly those proximate to larger centres) have fared less well. The performance of many secondary destinations has also been particularly impacted upon by the recession and the growth of internet shopping, which has resulted in many operators

and consolidating their store estate to reduce costs, believing that they can still achieve appropriate nationwide coverage with a lesser number of stores.

- 3.2.2 Colliers reflects² on what has happened to the space within the 160 former BHS stores across the country in their latest Midsummer Report. As Colliers reports, there has been a dramatic increase in supply across the region. A large number of BHS stores are still vacant and the situation has been exacerbated by Company Voluntary Agreement ('CVAs') including New Look. The Centre for Retail Research issued a list in October 2018 of 'Who's Gone Bust in Retailing 2010-18³?' details UK retailers who went into receivership between 2005 and 2018, based on research carried out at the time and based on the understanding of The Centre for Retail Research of those business affairs then.
- 3.2.3 The Centre for Retail Research has analysed the main retail failures in the period since the recession. There are 32, with 12,770 stores affected and 175,714 employees. They range from Blacks Leisure in 2008 to BHS in 2016, Store Twenty One and Palmer and Harvey in 2017 and Toys 'R' Us, House of Fraser, Maplin and Poundworld in 2018. Woolworths was the biggest casualty in this period with 820 stores and 30,000 staff, BHS was the second largest in terms of stores and House of Fraser the second largest in terms of staff.
- 3.2.4 In November 2017 M&S set out a five-year transformation programme for the business, involving a slowdown in the Simply Food store opening programme and an acceleration of the UK store estate closure programme, after the better than expected levels of sales transfer from closures and plans to grow online sales. In May 2018 M&S announced proposed further store closures⁴, followed by more recent announcements of additional closures in January 2019⁵. M&S propose to close over 100 stores in total by 2022. However, the M&S proposed closures announcements exclude stores in Preston. The transformation programme includes relocations, conversions, downsizes and the introduction of concessions (including for a Metro Bank and a trail of an in-store opticians service).

² Colliers Midsummer Report 2018

³ <http://www.retailresearch.org/whosgonebust.php>. The Centre for Retail Research includes the following legal notice: *'this listing of UK retailers who went into receivership between 2005 and 2018 is based on research carried out at the time and our understanding of their business affairs then. Some of these companies recovered and came out of administration; some were bought by other businesses; some were sold as going concerns but changed their name; for some, the name was bought and this is still used, but under different ownership; and others ceased to exist. The presence of any business in this historical listing must not be taken to imply that it no longer exists, its name is not used or that such business, if still trading, is impaired in anyway.'*

⁴ <https://corporate.marksandspencer.com/media/press-releases/2018/m-and-s-uk-store-estate-update>

⁵ <https://www.bbc.co.uk/news/business-46876749>

- 3.2.5 In October 2018, Debenhams confirmed the proposed closure of up to 50 of its 165 stores over the next three to five years. To date, Debenhams have not released a list of proposed store closures.
- 3.2.6 This leaves a huge oversupply in some towns with limited demand. The issues are worst in the secondary locations where vacancy rates have increased by 4.5% across the region. Outside of London, the success rate in terms of take-up is poor and just over a third of the stock had found a new use. However, Colliers acknowledges that there is a positive to be taken from the process in that it has provided opportunities for new leaders of the occupational market to take on space, with occupiers such as Primark, Next, Aldi, Lidl, Sports Direct, TK Maxx, Poundworld, Wilko and The Range all acquired new stores. As Colliers concludes, the next 12 months are looking uncertain. Whilst there are a variety of pressures on retailers which are squeezing profit margins, the continued structural change in the retail market place is the driving force creating a significant imbalance of supply and demand.
- 3.2.7 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 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.
- 3.2.8 The selective nature of retailer demand has fuelled the polarised retail environment with many operators focusing on key high footfall locations. The impact of these changes on individual centres is varied with some towns performing better than others. Research into town centre retail performance over the last decade completed by Cushman & Wakefield in 2018⁶ identifies that the ‘winning’ locations tend to be the largest retail centres, such as cities or attractive cathedral towns. These locations typically benefit from low levels of comparison floorspace provision relative to their population leading to higher sales densities, and higher tourist and leisure spend.
- 3.2.9 Nevertheless, town centre resilience is more closely correlated with affluence than catchment size. Those towns with the least resilience typically suffer from weak income profiles and low wage growth that curtail spending, along with higher rates of crime and a significant oversupply of comparison retail and leisure floorspace.

⁶ UK High Streets: Dead or Alive? Cushman & Wakefield, April 2018

- 3.2.10 Such changes can result in particularly significant impacts on smaller and the least resilient town centres, which have tended to be the subject of higher vacancy rates, and which have also often suffered related reductions in commercial rental values and footfall in recent years. A reduction in commercial rents demonstrates a lack of demand for properties and poor take-up rates, along with high yields. Whilst low rental levels are often seen as a negative, as they indicate a lack of demand from major retailers, there are benefits to independents and local operators seeking cheap accommodation (even rent-free in some circumstances). In any event, as a consequence, a greater proportion of comparison goods expenditure is being claimed by a smaller number of 'winning' destinations, typically cities of regional or sub-regional importance.
- 3.2.11 However, such changes have also brought forward opportunities for different types of retailer. Some available units in secondary 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 secondary centres are heavily reliant on such retailers, which are generally operated at the lower end of the market. We saw the closure of Poundworld in 2018, with 335 shops closing in August, demonstrating that the bargain retailers are not as popular as they once were. Rising wage costs, business rates and declining footfall, along with a vast change in the way we shop all assisted in the demise of the retailer.

3.3 Independents and Markets

- 3.3.1 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.
- 3.3.2 Multiples continue to be a powerful force within the retail sector, both as marketable brands, and in their ability to secure prime locations in Town Centres. However this does not underestimate or undervalue the important role of small independent shops and street markets, which help to improve consumer choice and convenience to the communities they serve, as well as generating significant benefits for Town Centre economies in terms of local employment and income generation. Furthermore, it is widely accepted that a good mix of independent shops and market stalls help to enhance the character, diversity and vibrancy of

Town Centres, preventing the growth of so-called 'clone towns'¹⁴ due to the increasing colonisation of centres by larger chain stores.

- 3.3.3 Retail markets therefore continue to make a meaningful and important contribution to towns and cities across the UK. The successful markets we see today are those which have embraced change and adapted alongside the town in which they trade; as the demographics of a town change a successful market will reflect this change and continue to cater for and attract the town's residents creating a vibrant and successful market. This will in turn attract visitors from outside the area and increase the value of the market.

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

- 3.4.1 Shoppers have turned away from food superstores in recent year and Mintel⁷ suggests that this decline is such that it cannot be considered a 'blip'. Mintel attributes the problems which face superstores to two principal factors.
- 3.4.2 As Mintel reports, the retail sector currently appears to be in turmoil. Mintel states that there has been an unprecedented number of failures or retailers reported to be in trouble just in the first quarter of 2018. It would be easy to go on to say that the whole retail sector, and particularly the store-based sector, is in deep trouble. But as Mintel states, it is not as straightforward as that. There are some general themes, but for most of the businesses that have been closed down, this has been because of their own specific problems. There may be underlying themes and it would be true to say that many of the retailers that have sought support through CVAs have over-expanded and had too much space. But that overexpansion has usually been exposed by their own underperformance, it has not necessarily been because of the success of online retailing. However, Mintel reports that 2017 was not as bad as expected and retail sales grew by 4.4% for the year, which was better than in 2016 (3.7%), but that masks a reduction in volume growth because of the increase in inflation.
- 3.4.3 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 3.1 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

⁷ 'UK Retail Rankings', Mintel, April 2018

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 3.1: 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

- 3.4.4 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 and uses such as hairdressers, key cutting and shoe repairs, photo processing are all taking concession spaces in larger Tesco and Morrison superstores.
- 3.4.5 Booths is a premium range grocery chain based in Lancashire, focused on regional produce. The Booths central office is located in Preston as well as a distribution centre on Bluebell Way and a large manufacturing unit at Riversway (where much of their meat is butchered and packaged). Booths has stores in the Study Area at Fulwood, Penwortham and Longridge. In September 2008, The Grocer reported that Waitrose had signed a deal with Booths⁸ to pool their resources and share buying duties on a range of products in an effort to lower product sourcing costs.

⁸ <https://www.thegrocer.co.uk/companies/waitrose-booths-shake-on-surprise-buying-alliance/193363.article>

- 3.4.6 In November 2018, Booths announced a trail partnership with Dobbie's Garden Centres, through the introduction of a Booths branded chiller in Dobbie's stores and Booths products are now available in Fenwick's. In October 2017, Booths announced its agreement with Amazon Fresh whereby a range of ready meals, cheese and deli products will be available across parts of south east England.
- 3.4.7 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 following successful Christmas sales in 2017 and after adding 76 new stores in the UK in 2017, intending to open 70 new UK stores in 2018⁹, bringing its total number of stores to around 800. Over the longer term, it intends to trade from 1,000 UK stores by 2022¹⁰. Aldi reports to require sites which are freehold, in town centre or edge of centre locations with a minimum of 0.5 hectares (or 1.3 acres)¹¹.
- 3.4.8 Lidl, who currently trades from over 690 stores, also has substantial growth plans for 2018 and beyond. Lidl's future requirements reportedly comprise units of between 14,000 sq.ft and 26,500 sq.ft, with sites of 0.6 hectares (or 1.5 acres) required for standalone units and up to 1.6 hectares (or 4 acres) for mixed-use schemes¹².

3.5 Special Forms of Trading

- 3.5.1 Many consumers who previously shopped in town centres and at retail parks are now increasingly using the internet to make purchases. Experian¹³ identifies that 'special forms of trading' (which includes internet, mail order and market sales) now comprises an estimated 14% of total UK retail sales at 2017, which compares to a market share of just 4.7% at 2008. Experian estimates that the value of non-store sales in the UK at 2017 is £55.1 billion. It estimates that special forms of trading will increase further to account for 20% of retail expenditure at 2022. Thereafter, it is anticipated that additional growth will be relatively limited, with special forms of trading claiming 22.5% of UK retail expenditure at 2035 (the last reporting year for which Experian provides a figure).

⁹ Article headlined 'Aldi pursues UK expansion', UK.Reuters.com 4 January 2018

¹⁰ Article headlined 'Supermarkets: discounters race for space', Property Week, 2 November 2016

¹¹ <https://www.aldi.co.uk/about-aldi/property/required-towns>

¹² <https://www.lidl.co.uk/en/Site-Requirements-5377.htm>

¹³ 'Experian Retail Planner Briefing Note 15', December 2017

- 3.5.2 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 Statistics¹⁴ reports increased from 57% of households at 2006 to 90% in 2018. 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 more than doubled – from 36% to 78% – between 2011 and 2018.
- 3.5.3 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 popularity¹⁵. 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.
- 3.5.4 Global Data's report Click & Collect in the UK, 2017-2022, indicates that despite rapid growth anticipated over the next five years, click & collect sales will be impacted as retailers continue to close unprofitable stores as physical locations struggle against the online channel, reducing the number of click & collect locations. In addition to this, more retailers are investing in delivery saver schemes following the success of Amazon Prime and ASOS Premier, encouraging shoppers to subscribe and save on delivery costs. As this is a primary driver of click & collect, this will also hinder sales via the channel.
- 3.5.5 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 trading¹⁶ in order to reflect purchases which are affected through stores. The adjusted allowance for special forms of trading equates to 3.7% for convenience goods at 2018, increasing to 4.8% at 2023, to 5.3% at 2028, to 5.7% at 2033,

¹⁴ 'Statistical Bulletin: Internet Access Households and Individuals', Office for National Statistics, August 2018

¹⁵ 'Click and Collect', Mintel, September 2014

¹⁶ 'Experian Retail Planner Briefing Note 16', December 2018



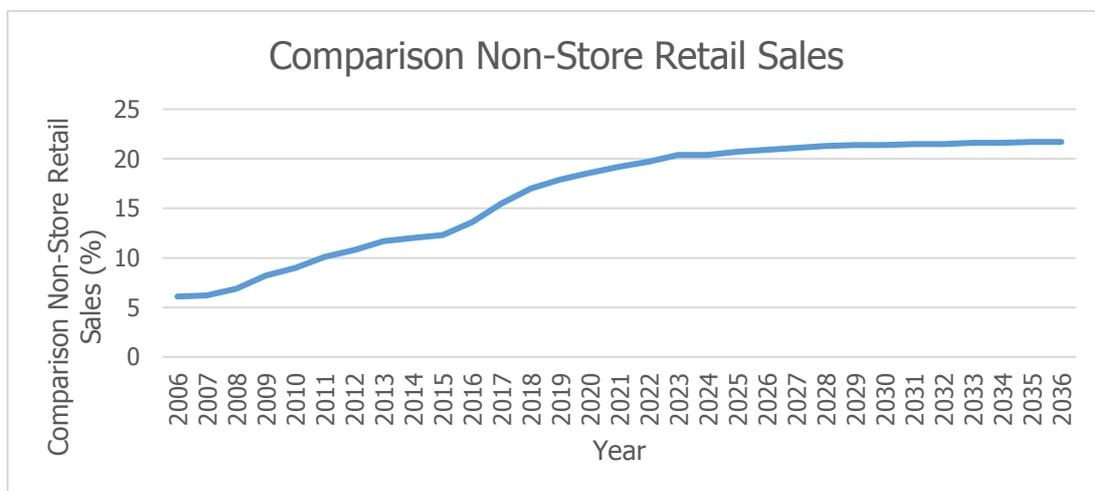
and to 5.8% at 2036. Figure 3.2 below shows the change in non-store retail sales for convenience goods since 2006, and the predicted change up to 2036.

Figure 3.2: Convenience Non-Store Retail Sales (Experian, December 2018)



3.5.6 For comparison goods, the adjusted allowance is 17.0% at 2018, increasing to 20.1% at 2023, to 21.3% at 2028, to 21.6% at 2033, and to 21.7% at 2036. The adjustment is greater for comparison goods, reflecting the fact that most online food purchases are taken from the shelves of actual stores. Figure 3.3 below shows the change in non-store retail sales for comparison goods since 2006, and the predicted change up to 2036.

Figure 3.3: Comparison Non-Store Retail Sales (Experian, December 2018)



3.5.7 However, there are opportunities for our high street related to click and collect facilities. NEMS reports (October 2018) that there is an opportunity to enhance the collection experience and therefore to promote impulse and complementary purchases. From national online research conducted by NEMS, it is reported that just under a third of the online shoppers are venturing into the physical stores to collect the products, which is an opportunity for retailers.

3.6 Leisure and the Appetite for Additional Food and Drink

3.6.1 People now eat out more often and for a wider range of occasions. PWC reports that the fundamental structural shift driven by demographic and consumer trends, has led to considerable market growth in the restaurant sector in recent years and underpinned significant transactional activity, particularly between 2015 and 2017. PWC also reports on the increasing crossover between market segments with the food-to-go sector growing and being available all day, while dine-in chains are offering take away options including enhanced technology to encourage the use of services such as Deliveroo and Uber Eats¹⁷. However, in very recent months, key national brands have announced their downsizing and closure of restaurants, including Prezzo and Jamie Olivers’.

3.6.2 In any event, those restaurant operators still seeking to expand their portfolio, 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.

3.6.3 The casual dining sector is experiencing a fall in like-for-like sales growth. The Guardian reports that the number of UK restaurants going insolvent increased by a fifth in 2017 compared with 2016¹⁸, according to law firm Moore Stephens, as major chains came under pressure from rising labour costs, higher business rates and increasing food costs (exacerbated by a weaker pound following the EU referendum) and competition amid a squeeze on consumer spending.

3.6.4 Deloitte summarises casual dining trends in its presentation on ‘Changing Tastes, the UK casual dining market, September 2017’. Such trends include millennials and Generation Z

¹⁷ <https://www.pwc.co.uk/services/business-recovery/insights/restructuring-trends/restaurants-2017-food-for-thought.html>

¹⁸ <https://www.theguardian.com/business/2018/feb/19/number-of-uk-restaurants-going-bust-up-by-a-fifth-in-2017>

seeking choices of healthy eating options, budget dining, gourmet fast food and indulgent meal options, informal and experiential dining experiences (select your own produce, show cooking concepts and immersive experiences), home delivery options, as well as increased consumer focus on food provenance and sustainability and the incorporation of digital technology throughout the customer journey, for example to provide delivery and pre-ordering services, or to connect to consumers in-store to offer customisable menus and dynamic pricing.

- 3.6.5 In November 2018, The Retail Bulletin reported that Waitrose intends to further roll out its supper clubs. Working with social dining platform WeFiFo, WeFiFo organises and hosts the events on behalf of chefs who develop menus using products available from Waitrose.
- 3.6.6 Colliers¹⁹ 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.
- 3.6.7 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.
- 3.6.8 There are a number of emerging leisure concepts which are also helping to anchor retail environments, including bowling alleys, indoor 'ninja' style activity centres, 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.

3.7 Influential Reports

- 3.7.1 The effects of the 2008 recession and the growth in e-commerce led to three influential UK reports on the future of town centres, these being the Portas Review (December 2011), the

¹⁹ Colliers Midsummer Report 2018

Grimsey Review (September 2013), and the Taskforce Report: Beyond Retail (November 2013). These three reports share common elements of:

- a recognition that there is a need to diversify town centres, so as to encompass other non-retail functions;
- a recognition of the need for a review of the business rates system, so as to reduce occupational costs for town centre businesses, compared to online retailers;
- a need to make it easier to change the use of buildings in town centres through further reforms to the General Permitted Development Order (which have subsequently been implemented by Government);
- the need for local planning authorities to be more proactive in the use of their CPO powers and for simplification of the CPO procedures; and
- a need for enhancement of secure car parking facilities within town centres and a review of pricing and management practices, so as to enable town centres to better compete with out-of-centre locations with free car parking.

3.7.2 The Ministry of Housing, Communities and Local Government and HM Treasury published a Future High Street Fund policy paper on 29 October 2018. It outlined structural changes on high streets, summarised below.

- High streets have been affected by major changes in the past decades, and the speed of this change is increasing. Online shopping in particular has become significantly more popular than it was 10 years ago. Between 2007 and 2018 online sales increased 6-fold while growth of in-store sales has lagged behind. In 2000 online retailing accounted for less than 1% of retail sales while in August 2018 almost a fifth of all retail sales took place online (Office for National Statistics).
- The rise in online retailing has reduced barriers to entry in the retail market. Online retailers are able to offer competitive prices, more choice and greater convenience than many high street competitors. In turn, consumers are changing what they want from their local high street: there is an increased importance on the overall 'experience' of high street shopping. People want local high streets to provide convenience, a sense of community and to add value through services not offered online. (Institute of Place Management)

- As a result, high streets are having to evolve and adapt. Evidence shows that high streets with a wide choice alongside well designed and planned residential and office space are more resilient to these changes and are adapting more successfully. In contrast, high streets that rely heavily on traditional retail without sufficient office space and housing surrounding the high street have found it harder to adapt to these changes and tend to be the ones that are struggling (Public Health England, British Property Foundation).
- Alongside this, local leadership is an important feature of successful high streets. Research shows that strong local leadership is needed to support effective regeneration, reconfiguring space, increasing the number of homes for young and old alike, encouraging more workspaces and reducing congestion with new infrastructure. Well-designed parking policy, active management of change of use of retail units and reinstatement of roads promptly to full use after roadworks can also support vibrant town centres. (Institute of Place Management)

3.7.3 To respond to these challenges, the Government has announced a new £675 million Future High Streets Fund will be set up to help local areas to respond to and adapt to these changes. It will serve two purposes: it will support local areas to prepare long-term strategies for their high streets and town centres, including funding a new High Streets Taskforce to provide expertise and hands-on support to local areas. It will also then co-fund with local areas projects including:

- investment in physical infrastructure, including improving public and other transport access, improving flow and circulation within a town / city centre, congestion-relieving infrastructure, other investment in physical infrastructure needed to support new housing and workspace development and existing local communities, and the regeneration of heritage high streets; and
- investment in land assembly, including to support the densification of residential and workspace around high streets in place of under-used retail units.

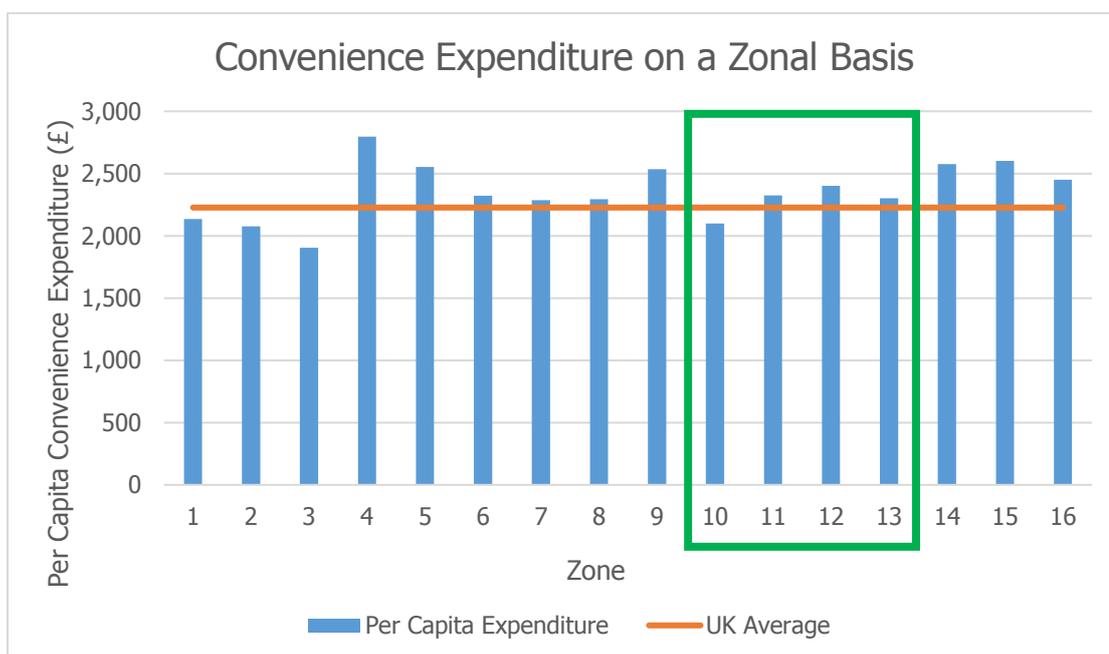
3.8 Expenditure in Chorley

3.8.1 The overall available expenditure within the Study Area's towns and residential areas varies in terms of both the convenience and comparison expenditure.

3.8.2 Table 3.4 below sets out the convenience expenditure per capita on a zonal basis across the Study Area as a whole, compared to the UK average. The Table demonstrates the differences in the spending per person on convenience goods across the Study Area, with the highest level of spending present in Zone 4 which covers the north western part of Preston’s authority area, including Catforth, Broughton and Woodplumpton. The lowest level of spending in the convenience sector across the Study Area is from residents in Zone 3 also covering Preston’s authority area, including Sharoe Green, Ribbleton and Fulwood, and the area to the north east of Preston city centre.

3.8.3 The green outline on Table 2.1 below depicts the zones broadly covered by Chorley’s authority area. The variances between the four zones (10 to 13) is less considerable than across the wider Study Area, with the lowest level of convenience spending per person in Zone 10, which covers Chorley town centre.

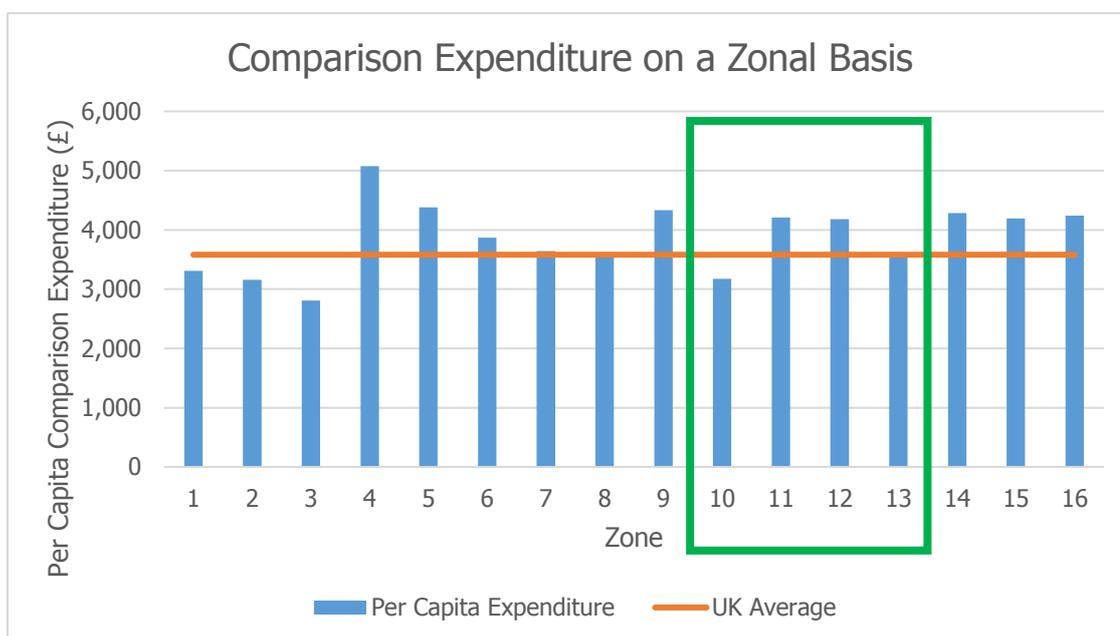
Table 3.4: Convenience Expenditure Per Capita across the Study Area



3.8.4 Table 3.5 below provides the same data on a zonal basis but for comparison spending. The Table demonstrates that the spending on comparison goods also varies considerably across the zones within the Study Area, with the lowest level of spending in Zone 3, as was the case for convenience spending. Again, the level of spending on comparison goods Zones 4 and 5 falls above the UK average. Comparing to the Indices of Deprivation, the lowest spending on convenience goods in zone 3 also accords with those areas which fall within the 10% most deprived within the UK.

3.8.5 Looking again at those zones within Chorley’s administrative area, we can see that the lowest level of per capita expenditure on comparison goods is within Zone 10 which covers the town centre, followed by Zone 13 which covers the south eastern part of the authority area, including Adlington. Looking at the Indices of Deprivation, the lowest spending on comparison goods in zone 10 of the four zones covered by Chorley’s administrative area also accords with those areas which fall within the 10% most deprived within the UK.

Table 3.5: Comparison Per Capita Expenditure Across the Study Area



3.9 Implications for Chorley

The Threats

3.9.1 It is the medium-sized towns that occupy the middle ground that are increasingly being squeezed by the dynamic shifts in retailer demand and investment. Historically, such towns have had a reasonably large comparison shopping function, but this is beginning to shrink back because the demand from multiples is slowing and the space offered is often of the wrong size and configuration, and in the wrong location to meet today’s retailer requirements. The challenge for local planning authorities will therefore be how to revitalise and regenerate these centres, looking beyond retail as a key driver for growth. Chorley falls within the middle ground of town centres, with larger competing centres in relative close proximity, putting strain on the ‘traditional’ high street format.

3.9.2 There are key challenges for Chorley town centre in light of the retail trends as summarised above. These are as follows:

- Existing town centres and retail destinations in Chorley Borough suffer from direct competition from large city centres, sub-regional town centre and out of centre shopping destinations within surrounding authorities of Preston, Bolton, Manchester and Blackburn (amongst others).
- The out of centre provision in Preston and Bolton in particular, provide a retail offer which directly competes with the retail offer in Chorley, and due to their accessibility and ease of access, are principal destinations for residents in the Borough, particularly those who choose to travel by car to meet their shopping demands.
- The internet is an ongoing competition for the defined centres in Chorley, and an increased reliance of residents purchasing goods online has had negative effects on defined centres, not only within Chorley but across the UK. The defined centres in the Borough face a number of challenges, particularly from increasing competition from the internet, multichannel retailing, polarisation of retailing and out-of-centre retail/leisure developments.
- The available convenience and comparison expenditure within the Borough varies throughout, putting added pressure on those centres located within areas where there is less available expenditure.

How Chorley Can Respond

3.9.3 Based on the above threats to the future of the vitality and viability of the defined centres within Chorley, and particularly Chorley town centre, it is important that Chorley seeks to respond to recent trends and seek to ensure that the centres continue to offer the services and amenities required by residents, whilst providing attractive destinations, with vibrant 'hearts' for the community. The following summarises the key action points:

- The continued growth of new out-of-centre/retail park formats represents a threat to the future vitality and viability of the defined centres in the Borough. In order to protect the vitality and viability of centres it is important therefore that the Council is not just controlling the expansion/change of use of out-of-centre development but also plan positively for town centre/edge-of-centre development opportunities. Suitable and available alternatives for developers and operators must be readily available within, and on the edge of defined centres to encourage schemes to sites

which will benefit defined centres through additional visitation and trade. Such available and suitable sites are also important in defending the sequential approach policy requirement, which has become less stringent in recent years and has significantly benefitted developers and land owners instead of local authorities in attempting to direct schemes to defined centres.

In Chorley's case, Market Walk shopping centre, in the heart of Chorley town centre, is being extended with a purpose-built development on the Flat Iron. The extension, off Union Street, will include a new six-screen Reel Cinema, M&S Foodhall as well as retailers and food and beverage outlets. In January 2018 councillors gave the final go ahead for the scheme, which also includes creating a second storey car park on Friday Street/Portland Street. This will bring an enhanced leisure and retail offer to the town centre, providing new 'anchors' with the aim to draw residents back into the town centre, with knock-on benefits to existing retailers and other operators already located in the centre. Encouraging visitors and shoppers to other existing destinations and areas in the centre will be key. The Market Walk scheme, which is already partly let with significant operators, will also hopefully be a catalyst to future investment and increase overall investor confidence in the centre and Borough as a whole.

- Whilst the growth of online retailing is likely to have had a detrimental impact on the turnover of Chorley's retail destinations, 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 Chorley town centre – but there are also likely to be opportunities for smaller centres to provide click and collect facilities, which could help encourage residents to visit the centres and access other facilities whilst they do so. Both convenience and comparison operators provide in-house 'click and collect' facilities which enable shoppers to order online at home and visit the stores to pick up the products. This often then has knock-on benefits to retailers by encouraging additional sales. As consumers are increasing their digital options, physical stores are making their locations interactive and engaging in order to attract footfall and justify the costs of store operations. Many are using tablets and smartphones for taking payments, demonstrating products, offering information and encouraging social sharing. Pop-up and street trading opportunities have substantially increased thanks to mobile systems and Cloud applications,



enabling a business to inexpensively open and compete on high streets. Chorley Council provides pop up shops in properties they own and will be including these at food events. Chorley Council also provides a Christmas market, Chorley Live events, and Taste of Chorley as supplementary markets in the pedestrian zones. Opportunities in Chorley for more temporary stores and food offers could be explored further, to encourage traders to open pop-up shops and seasonal offerings.

- Convenience operators such as Tesco and Asda also provide 'click and collect' pods within car parks, providing opportunities for shoppers to order their groceries online, and drive up to the pods to collect their pre-packed goods. Therefore, schemes which promote such uses should be encouraged by local authorities.
- Chorley's indoor and outdoor markets act as an important economic driver within the town centre and is popular to residents of Chorley and visitors alike. The monthly food and craft markets also act as an important draw to the town centre, and these events are vital in bringing shoppers into the centre. The markets, alongside the independent operators and regular town centre events, are all adding to the qualitative offer of the centre, seeking to make Chorley differentiate itself from other competing centres. It is important that the Council and local stakeholders continue to support the protection of these assets, through the delivery of improved facilities and an increase in events throughout the year which bring visitors and residents into the town centre.

4.0 Summary of Health Check Findings

4.1 Introduction

4.1.1 Comprehensive up-to-date monitoring of town centre performance is an important exercise that is required to identify the strengths and weaknesses of a centre, establish how its vitality and viability can be improved, and to effectively plan for the future of the centre.

4.1.2 As part of our instruction, we have undertaken a detailed and up-to-date assessment of the health of each of the defined city and local centres in Chorley (commonly referred to as a 'health check'), namely:

- Chorley town centre;
- District centres – Clayton Green and Buckshaw Village (2); and
- Local centres – Bolton Street, Pall Mall, Lancaster Lane, Great Greens, Chorley Old Road, Wheelton, Bury Lane, School Lane, Croston, Balshaw, Runshaw, Eccleston, Carrington, Mawdesley, Coppull, Chorley Road, Market Plan, Collingwood Road, Eaves Green Road, Eaves Lane North, Eaves Lane South, Hall Gate, Harpers Lane, Park Road, Pilling Lane, Steeley Lane and Water Street (27).

4.1.3 The local centres provide a range of small shops that serve a small local catchment and the town centre seeks to provide a full range of retail, leisure and other main town centre uses to meet its role within Central Lancashire.

4.1.4 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 throughout June to August 2018, along with further data received from the Council in December 2018. Our survey data was used to update the latest Experian Goad data on uses and floorspace within Chorley town centre. For the district and local centres, units were categorised by WYG using the Experian Goad categories and classification and floorspace measured from MasterMap data. A table detailing the Experian Goad classification of retail and service uses is provided at Appendix 2 for reference. The assessment considers ground floor floorspace only. The total uses identified as part of the diversity of use assessment relates to retail and service units within the defined centre boundary only. All other non-residential uses

within the centres are categorised under 'other', which includes uses such as offices, health and medical services, public services and transport services. Residential uses were not categorised as part of the diversity of uses assessment.

- **Proportion of vacant street level property** – Vacant properties were identified during the undertaking of the surveys.
- **Customers' views and behaviour** - Analysis of customers' views and behaviour in respect of Chorley town centre is provided in the subsequent Section 5 of this report. No data on customer views and behaviour was available for the district and local centres.
- **Retailer representation and intentions to change representation** – Information on the performance of centres and the current strength of retailer representation has been derived from our surveys of the centres and Venuescore's 2016-17 UK Shopping Venue Rankings for Chorley town centre.
- **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.
- **Perception of safety and occurrence of crime** – Consideration of safety measures within each centre has been informed by our observations while undertaking our site visits. Recorded crime data has also been obtained from online sources (www.police.uk) for Chorley town 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.

4.1.5 Below, we set out a summary of our health check assessments for Chorley town centre and each of the defined district and local centres in Chorley, along with a 'SWOT' analysis to identify the strengths, weaknesses, opportunities and threats relating to each centre. We provide a full, detailed assessment of the health of these centres at Appendix 3 (Chorley town centre) and Appendix 5 (district and local centres), and with supporting tables and plans set out at Appendices 4 and 6, respectively.

4.1.6 Before we commence our assessments, we first identify the sub-regional retail context, considering the role and movement of Chorley's centres in the sub-regional shopping hierarchy as identified by Venuescore's 2016-2017 UK Shopping Venue Rankings.

4.2 Sub-Regional Retail Context

Overview

- 4.2.1 Chorley is located in the Central Lancashire Region. Central Lancashire is bounded by Fylde and West Lancashire to the West, Ribble Valley and Blackburn with Darwen to the East, Wyre to the North and Greater Manchester to the South.
- 4.2.2 Chorley is a traditional market town grown from its focus along Market Street and now includes a range of retail, leisure and service uses. Chorley's focus is around the Market Place and has a series of pedestrianised streets running through the centre.
- 4.2.3 The centre includes the Market Walk shopping centre which provides modern format retail and leisure space for national multiples such as B&M, Bodycare, Boots, Clintons, Game, JD, New Look, Iceland and Poundland. Permission has been granted for the extension of Market Walk to house a new cinema, new restaurants and new Class A1 floorspace which is currently under construction and has a completion date due in December 2019.

Movement in the National Retail Rankings

- 4.2.4 Table 4.1 charts the movement of Chorley town centre in Venuescore, the UK shopping venue rankings produced by Javelin Group and compares it to the position in the Venuescore rankings of the principal competing centres within the sub-region. Also included in Table 4.1 are the Venuescore rankings of the defined local centres and retail parks in Chorley, where assessed by Javelin.
- 4.2.5 Venuescore's index ranks 3,295 retail venues within the UK (including city, town district and local 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.
- 4.2.6 Venuescore further 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'.
- 4.2.7 Chorley town centre is ranked 278th of all the 3,295 venues evaluated in Venuescore 2016-17 and has risen in rankings by eight places since 2015/2016. As would be expected, Preston

is the highest ranked centre in Central Lancashire, followed by Chorley town centre. Over this same period, Blackpool and Blackburn town centres have all also increased in rankings.

- 4.2.8 The four other destinations identified in the Rankings within the Borough have also all risen in rank, with the most significant increase being Clayton-le-Woods which has risen by 200 places in the Rankings.
- 4.2.9 It is emphasised that whilst the Venuescore rankings provide a useful indicator of a centre’s position within the national hierarchy, Venuescore’s methodology does not take account of many factors that contribute to the vitality and viability of a centre, such as independent businesses. As such, a degree of caution should be applied when considering the Venuescore rankings, which should be considered in conjunction with the other health check indicators provided in this report.

Table 4.1: Venuescore Classifications

Venue	Score 2016/17	Classification 2016/17	Rank		Change in rank between 2015/16 and 2016/17
			2015/16	2016/17	
Preston city centre	228	Regional	56	58	-2
Blackpool town centre	212	Regional	74	68	+6
Blackburn town centre	156	Regional	147	143	+4
Chorley town centre	96	Sub-Regional	278	270	+8
Preston, Deepdale RP	69	Major District	480	408	+72
Preston, Bamber Bridge	22	Minor District	1429	1418	+11
Preston, North Rd (R P)	20	Minor District	1193	1559	-366
Leyland, Centre	18	Local	1709	1696	+13
Chorley, Alliance RP/ Highfield IE	17	Local	1789	1775	+14
Chorley, Ackhurst Park IE	14	Local	2193	2171	+22
Preston, Station Rd	14	Local	2034	2171	-137
Chorley, Clayton Le Woods	13	Local	2577	2377	+200
Chorley, Ordnance Rd	12	Local	2577	2566	+11

4.3 Overview of Chorley Town Centre

- 4.3.1 Chorley is a traditional market town having grown from its historic focus along Market Street. The town centre encompasses a network of pedestrianised streets with a distinctive focus around the centrally located Market Place situated between Cleveland Street and New Market Street. These shopping streets, together with nearby Chapel Street and Market Street, comprise the primary shopping area within the town centre. The Market Walk development, which opened in the mid 1990’s, is well integrated within the wider town centre retail circuit.
- 4.3.2 Chorley is located 15.5km to the south of Preston, and approximately 41.5km to the northwest of Manchester. Chorley town centre is the principal shopping area in the Borough.

The adopted Local Plan (2015) recognises the importance of the town centre in supporting residents of the Borough and directs retail development and main town centre uses to the town centre in the first instance. The centre can be described as being in two parts; the linear retail strip along Market Street and the pedestrianised areas in the north section of the town which includes Chapel Street, Cleveland Street, Market Walk, New Market Street and Fazakerley Street.

- 4.3.3 The Market Walk Shopping Centre is currently subject to an extant planning permission which includes the demolition of several buildings and the erection of a two-storey retail convenience unit, a two-storey restaurant and cinema, a single storey restaurant and retail unit on the Flat Iron Car Park. Work has commenced on the main buildings which is due to be opened by December 2019.
- 4.3.4 A recent major development on the corner of Chapel Street, called the Inspire Centre, opened in May 2018. The Inspire Centre was purpose built to provide young people aged 8-19 and disabled persons up to 25 with a space to socialise, gain new skills and for sport and recreation activities.
- 4.3.5 The Council adopted a masterplan in April 2013 (updated in 2016 to reflect updated public realm proposals and the Market Walk extension) to set out the future development of Chorley town centre, providing a deliverable framework for investment at key development sites, with the aim to ensure the vitality and viability of the town centre going forward. The masterplan noted three key opportunity areas for development; South Market Street / Fleet Street, the Civic Quarter and the Flat Iron Car Park. It also set out a framework for the redevelopment of the town centres public realm, primarily focusing on Market Street and the pedestrianised section of the town centre in the north, and also presented a series of potential development options for the opportunity sites.
- 4.3.6 The Market Strategy sets out short, medium and long-term measures to ensure Chorley's various markets continue trading whilst major developments occur in the vicinity and also what they may need to become to continue to thrive in the long-term, such as developing a new modern market hall.
- 4.3.7 There are two main markets in Chorley. Chorley's covered market, which makes up the heart of the town and operates five days a week, and Chorley's Street Market which is now located along the streets of Chorley town centre. The stalls line Fazakerley Street, Chapel Street, New Market Street, Cleveland Street and the bottom half of High Street ever Tuesday. Traditionally, this market was held on the Flat Iron (sometimes known locally as the 'Cattle

Market'), however, in July 2017, the market moved to the streets to make way for the extension to Market Walk Shopping Centre.

- 4.3.8 The Council has aspirations for developing a new multi-purpose Civic Square facing the Town Hall which would accommodate markets and special events as well as additional parking capacity when not being used as an amenity space. The first phase of works has been completed in the demolition of Oak House and Royal Oak to create a 44 space car park and event space, however further work is required to vacate the remaining site in order to complete the scheme.
- 4.3.9 Chorley town centre is covered well by CCTV cameras, with new poles and cameras being installed in 2018 in four key locations in the town centre.

Diversity of Main Town Centre Uses

- 4.3.10 The diversity of uses analysis is summarised in Table 4.2 below. We also provide two charts indicating the split of uses across the town centre, and compares these with the UK average. Our assessment is based on Experian's latest Goad survey for Chorley town centre, and updated to reflect the centre's composition and state. The survey found there were 288 units and 50,930 sq.m of retail floorspace within the GOAD boundary for Chorley.
- 4.3.11 The proportion of units currently occupied by convenience operators falls below the national average at 8.3% compared to 9.0% but the proportion of floorspace occupied by convenience operators is above the national average at 21.4% compared to 15.2%. This higher than average proportion of floorspace occupied by convenience goods operators is due to the presence of the Asda supermarket and the Booths store within the Goad survey boundary, which account for 76.3% of the total convenience floorspace.
- 4.3.12 The proportion of units occupied by comparison operators falls above the national average at 30.9% compared to 30.6% but below the national average in terms of floorspace at 28.4% compared to 34.6%. These figures indicate that the overall stock of comparison units are typically within smaller units, with the average existing comparison unit size measuring 166 sq.m. Retail services occupy 14.2% of the units in the centre, which is slightly below the national average of 14.6%, however, the amount of floorspace in retail service uses was calculated as being 8.0% which is higher than the national average
- 4.3.13 Leisure services occupied 61 units, equating to 21.4% of all units in the town centre. This is below the national average of 24.1%. The amount of floorspace recorded in the town centre was also below the national average (20.4% in Chorley to 25.1% nationally).

4.3.14 The proportion of units and floorspace occupied by financial and business services falls above the national average in both cases indicating there is a concentration of financial and professional institutions in the town centre.

Table 4.2 – Diversity of Use, Chorley Town Centre

	Chorley Town Centre					
	No. of units	% of total	UK	Floorspace	% of total	UK
Convenience	24	8.3%	9.0%	10,890	21.4%	15.2%
Comparison	89	30.9%	30.6%	14,460	28.4%	34.6%
Retail Service	41	14.2%	14.6%	4,070	8.0%	6.9%
Leisure Services	61	21.2%	24.1%	10,390	20.4%	25.1%
Financial and Business Service	32	11.1%	10.2%	4,330	8.5%	7.6%
Vacant	41	14.2%	11.3%	5,330	13.3%	9.9%
Total	288	100%	100%	50,930	100%	100%

Source: Experian Goad Survey of Chorley town centre, WYG Survey June 2018

* Recategorised by WYG with Experian Goad Main Town Centre Uses

* UK Average Figures, Experian Goad, June 2018

Figure 4.3 – Diversity of Use, Chorley Town Centre – Proportion of Units

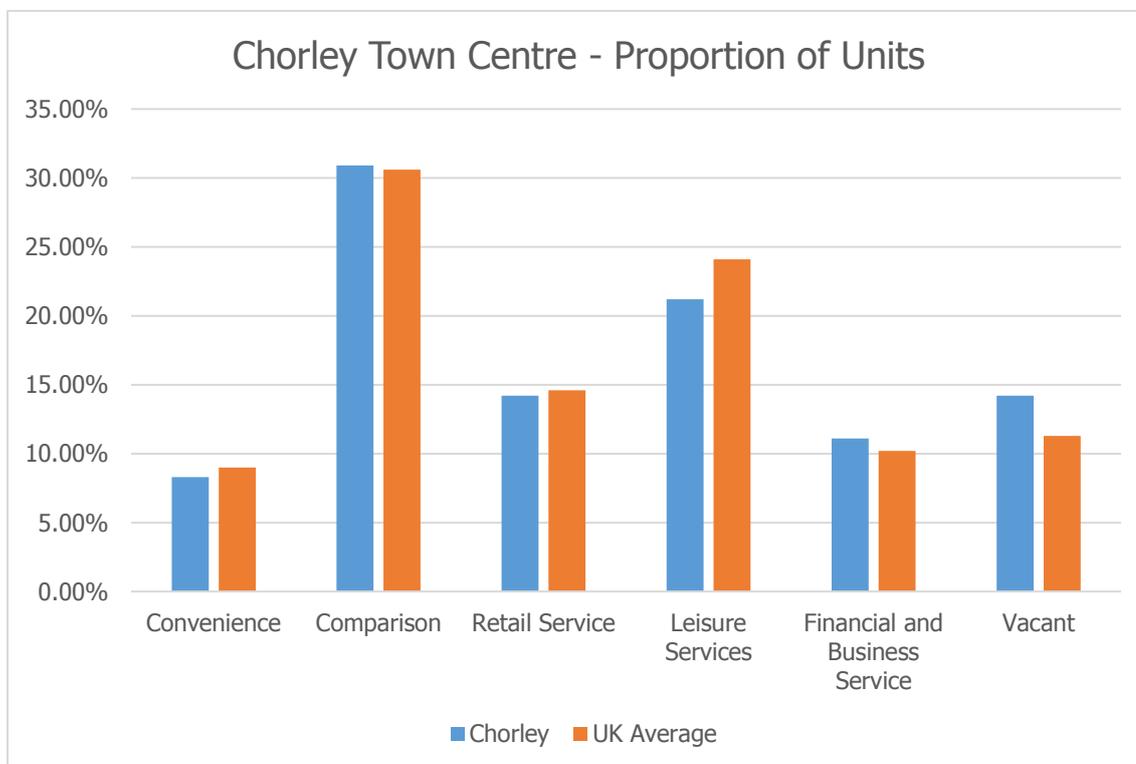
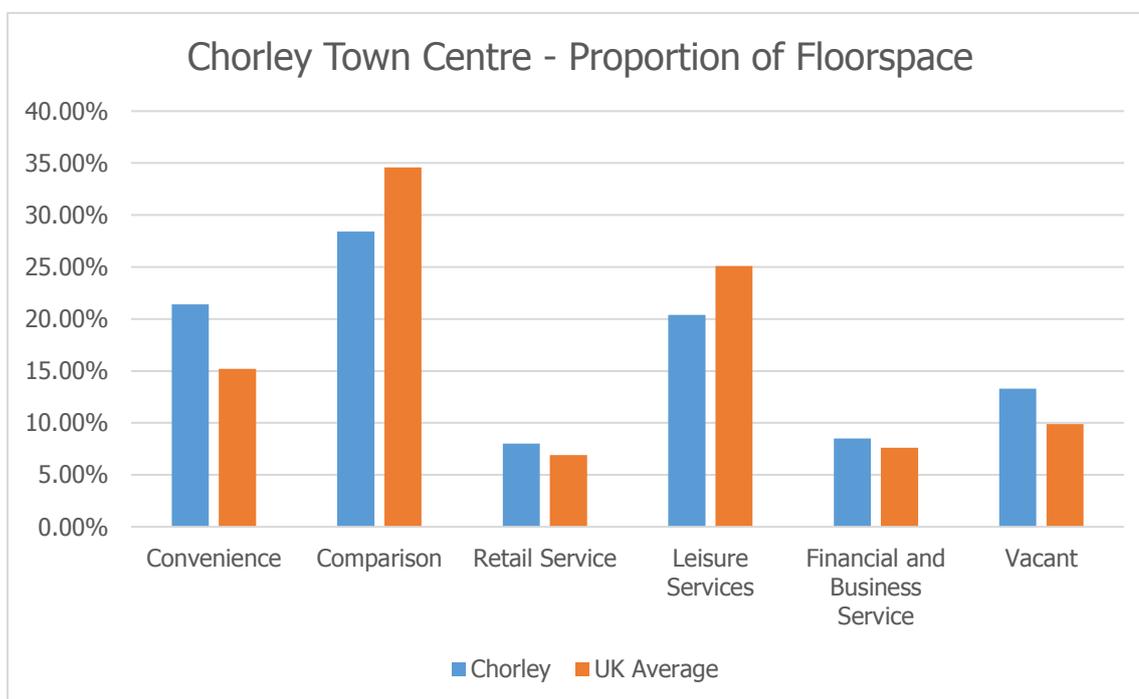


Figure 4.4 – Diversity of Use, Chorley Town Centre – Proportion of Floorspace



4.3.15 Previous health checks were undertaken in respect of Chorley town centre in 2005 and 2010. The 2010 health check found Chorley town centre to contain 326 retail units and 59,880 sq.m retail floorspace. This had increased from the health check in 2005, which recorded a total of 295 units and 47,715 sq.m of floorspace. The reasons for the changes in the total number of units and floorspace between 2005 and 2010 and then 2010 and 2018 is unclear but we review the general shifts in the overall diversity of use below, with the caveat that the total floorspace recorded by GOAD has altered between the dates.

4.3.16 Looking back at the 2010 health check (detailed further in Appendix 3) undertaken as part of the Central Lancashire Retail Study, the centre had a vacancy rate of units of 9.8% and a vacancy rate of floorspace of 9.7%. In terms of the proportion of units, the vacancy rate had reduced from 2005 to 2010 and in terms of the proportion of floorspace, the vacancy rate had increased. From 2010 to 2018, we have again recorded an increase in the proportion of units which are currently vacant and a decrease in the proportion of floorspace currently vacant.

4.3.17 Vacancy rates in the centre are considered as being above average, with both the proportion of vacant units (14.2%) and amount of vacant floorspace (13.3%) being national averages (11.3% and 9.9% respectively).

- 4.3.18 We can see that the proportion of convenience units and floorspace have increased since 2010, principally due to the opening of the Asda foodstore which is included in the Goad survey boundary. However, the proportion of units and floorspace occupied by comparison operators has decreased in both cases. In terms of the vacancy rates, the level of vacant units has increased from 9.8% in 2010 to 14.2% in 2018 and the proportion of vacant floorspace has increased from 9.7% to 13.3%.
- 4.3.19 The 2010 survey identified that the proportion of national multiple fashion retailers was limited and that the attraction of mainstream high street fashion retailers would be required to diversify the offer.
- 4.3.20 The 2010 health check noted similar disparities between the pedestrian flows and environmental quality in the northern part of the town centre (rated as busier and higher quality) and the southern. Whilst the pedestrian flows have remained similar to those observed in the 2010 health check, the environmental quality of the southern part of the town centre has improved since then through the landscaping enhancements which have been carried out along Market Street.
- 4.3.21 The 2010 health check also noted a deficiency in High Street fashion retailing, something which remains apparent in our own assessment.

Retailer Representation

- 4.3.22 Table 4.3 below provides a list of the comparison national multiples present within Chorley town centre which Goad identifies as the main national multiples. Experian Goad produces a list of the top comparison retailers, which acts as a measure of the vitality and viability of a centre. We can see that Chorley contains 12 out of the 28 identified national multiples and that there a number of operators not present in the town centre.

Table 4.5: National Multiple Presence in Chorley Town Centre

Retailer	Chorley Town Centre
Argos	✓
Monsoon/ Accessorize	-
Boots	✓
Burton	-
Carphone Warehouse	✓
Clarks	✓
Clintons	✓
Debenhams	-
Dorothy Perkins	✓
H&M	-
HMV	-
House of Fraser	-
John Lewis	-
Marks & Spencer	-
New Look	✓
Next	-
O2	✓
EE	✓
Primark	-
River Island	-
Superdrug	✓
TK Maxx	-
Topman	-
Topshop	-
Vodafone	✓
Waterstones	-
WHSmith	✓
Wilko	-
Total	12

4.3.23 Vacant units were generally spread out through the centre but there was a noticeable clustering along High Street both in terms of scale and amount. The units in this area consist of the former Post Office and several other retail units in proximity. The Post Office relocated to new premises in May 2016, the ground floor remains vacant whilst the 2 upper floors contain the BT Exchange. A collection of buildings on the corner of Market and High Street have been demolished to accommodate a car park for 44 spaces in line with the Councils Parking Strategy. The remainder of this area will form phase 1 of the Civic Square proposal (Chorley Town Masterplan). Of the vacant units, the average unit size is 144 sq.m, demonstrating that the typical size of units throughout the centre is generally small.

4.3.24 We are also aware that the building former occupied by Runshaw College at the southern end of Market Street is currently subject to an approved planning permission (Approved October 2017) for a veterinary practice and animal groomers. At the time of survey, no works had commenced but WYG is aware that a building control noticed for the internal works was posted in October 2018 – we would therefore consider this unit as being under alteration.

Accessibility

4.3.25 Chorley Bus station is located on Chapel street, within the eastern fringe of the town centre. The bus station is a sub-regional interchange with regular services to Preston, Whittle-Le-Woods, Buckshaw Village, Adlington, Euxton. It also connects to destinations in the wider regional area such as Blackpool, Wigan and Bolton and is also a National Express coach stop.

4.3.26 Chorley train station is located just outside of the town centre boundary on the east side of the A6 (Shepherds Way), with frequent services to Manchester Piccadilly, Preston, Blackpool and destinations in between. Whilst being in proximity, the linkages to the town centre are not well sign-posted or easily navigable from the platforms or the street, especially accessibility from the southbound platform due to the absence of lifts or level access. We would also consider the A6 acts as a physical barrier between the two and the current crossing options could be improved to help orientate and direct users.

4.3.27 In terms of access by car, the town centre runs near parallel and adjacent to the A6, a major regional route linking Chorley to the M61 to the south and the M65 to the north. The town centre is served by several car parks. The Flat Iron car park, located off Union Street, contains 170 short stay (max 2 hours) parking spaces which is pay and display during weekdays 9am-5pm and weekends 8am-1pm. It also contains two electric vehicle charging points. To compensate and offset the loss of spaces as a result of the development on part of the Flat Iron car park, the Friday Street Car park has re-opened as a two level car park creating more than 300 space, and in turn increasing the capacity by 96 spaces.

4.3.28 We considered the centre to be busy, with a particularly high amount of footfall in the northern and pedestrianised section, we would expect the distribution of vacant units to be concentrated in less visited areas, however we found the vacant units were evenly spread throughout the centre. Other, possibly macro-economic factors could be attributed to this or it could be a case that the centre is experiencing shrinkage due to the overprovision or concentration of the same retailer types.

4.3.29 The environmental quality was considered to be good but there is a clear delineation between Market Street / the southern section and the northern / pedestrianised section, with the latter having a more dated aesthetic and feel.

4.3.30 We provide a summary of the SWOT analysis for Chorley town centre below.

STRENGTHS

- Good national retailer representation in the context of the centre's size and role and strong independent retailer representation;
- Good general environmental quality and pedestrianised realm, which is set to improve further.
- The town centre was assessed as having below average vacancy rates when compared to national averages.
- There are a number of development opportunity sites within the town centre, some of which we are aware are coming forward.
- Market Walk is owned by the Council, meaning it allows for a significant amount of control regarding the uses contained within it and also helps in terms of driving the Market Walk expansion plans to realisation.
- Significant areas of the town centre are pedestrianised allowing for the safe free flow of pedestrians and more opportunities for retailers to interact with the street scene

WEAKNESSES

- The quality of some of the comparison retail goods is somewhat low, seemingly focused on low budget or non-branded goods.
- There is an absence of medium to large format commercial units, with the town centre primarily offering small scale units.
- The absence of a large-scale leisure venue however, we recognise that a six screen cinema is proposed as part of the Market Walk extension.
- Minimal amenity greenspace and public open spaces within the town centre for pedestrians to utilise for recreation purposes.
- The demographics of the town is considered to be poor, with no large student base in the vicinity of the town centre. We do recognise however that the recent opening of the Inspire Centre may address this issue over time.

OPPORTUNITIES

- To improve the visual setting and aesthetics of the covered Market Hall and the surrounding buildings and streets, through the delivery of improved shopfronts, public realm and civic open space. Improvements to the over-spilling of the market onto the

pedestrian footpaths and the built environment of the covered market would assist in improving the aesthetics of the area.

- Opportunity to improve the legibility and connectivity in the streets which run in an east – west alignment and from the train station, through the provision of additional signage, public realm improvements and pieces of public art which will draw pedestrians through the town centre
- To improve the evening economy on the back of recent leisure use openings and in advance of the delivery of the cinema in the Market Walk extension.
- Improved evening economy on the back of a thriving micro-pub dynamic across the town centre in recent years and forthcoming cinema and restaurants in the Market Walk extension.
- To encourage residential development within the town centre through the conversion or change of use of existing buildings, particularly on upper floors.
- Community spaces and places rather than retail focussed use of space

THREATS

- Wider macro-economic trends which show the decline in bricks-and-mortar retailing and the shift away from the 'traditional' town centre uses. Whilst there is still a requirement to provide the retail, leisure and community uses, town centres are required to offer uses beyond these to attract shoppers in.
- Several major retailers (e.g. New Look) have announced financial difficulties and have subsequently announced store closures will be necessary. At this point in time, the final list of store closures has not been confirmed but could include branches in the town centre
- Major retail developments in the area outside of the town centre e.g. Botany Bay Designer Village and Cuerden may draw trade away from the centre.
- There are several large out of town retail parks nearby, including Middlebrook in Bolton and Alliance Retail Park in Chorley which host large national multiple retailers and chains which could divert trade away from Chorley.
- Reduction in the number of bus routes to more rural areas in the borough leading to a rise in car use to the town centre and/or decline in overall accessibility.

4.4 Health Checks of Chorley's District and Local Centres

- 4.4.1 Individual health checks reports for each district and local centre in the Chorley local authority area are contained at Appendix 5. Table 4.6 below shows the diversity of uses present across each of the district centres. We can see that neither of Buckshaw or Clayton

Green district centres currently have any vacant units and both are served by one convenience operator. Within Buckshaw, the leisure service offer is high and accommodates 50% of the total number of units. Clayton Green has substantially fewer commercial units but is dominated by a larger Asda foodstore and a sports centre, both of which provide important facilities for the local community.

Table 4.6: District Centre Unit Composition

District Centre	Convenience	Comparison	Retail Service	Leisure Service	Financial Services	Vacant	Total
Buckshaw Village District Centre	1	1	3	6	1	0	12
Clayton Green District Centre	1	0	1	2	0	0	4

4.4.2 Turning to the defined local centres in the Borough, Table 4.7 below provides a breakdown of the number of units for each use within the 27 centres. The table demonstrates that the existing local centres within the Borough vary considerable in scale, with the largest being Pall Mall local centre with a total of 47 commercial units and the smallest being Eaves Green Road with three existing commercial units.

4.4.3 The centre with the highest proportion of vacant units is Chorley Old Road in Whittle-le-Woods, of which 75% of the units are currently vacant. Hall Gate local centre in Astley Village also has a high vacancy rate of the total units of 20%.

Table 4.7: Local Centre Unit Composition

Local Centre	Convenience	Comparison	Retail Service	Leisure Service	Financial Services	Vacant	Total
Collingwood Road Local Centre	1	0	2	1	0	0	4
Eaves Green Road, Chorley	0	1	0	2	0	0	3
Eaves Lane (North), Chorley	3	4	2	4	0	1	14
Eaves Lane (South), Chorley	2	3	4	4	4	2	19
Hall Gate, Astley Village	1	1	0	2	0	1	5
Harpers Lane	1	1	4	3	0	1	10
Park Road Local Centre	0	1	1	1	2	1	6
Pilling Lane Local Centre	1	0	2	0	3	0	6
Steeley Lane, Chorley	4	5	5	4	4	3	25
Water Street Local Centre	1	0	0	3	2	0	6
Balshaw Lane, Euxton	4	1	2	5	0	0	12
Bury Lane, Withnell	0	1	2	2	0	1	6
Carrington Centre	3	3	4	2	0	0	12
Chorley Road, Adlington	6	4	7	5	3	4	29
Coppull	6	8	9	6	3	2	34
Croston	0	0	1	5	1	1	8
Eccleston	0	2	3	1	2	0	8
Market Place, Adlington	1	2	4	4	9	0	20
Mawdesley	1	0	0	2	0	0	3
Runshaw Lane, Euxton	3	0	1	3	0	0	7
School Lane, Brinscall	1	0	1	3	0	0	5
Chorley Old Road, Whittle-le-Woods	1	0	0	0	0	3	4
Great Greens Lane, Clayton Brook	1	2	1	3	0	0	7
Lancaster Lane, Clayton-le-Woods	2	0	1	2	0	0	5
Wheelton	1	1	4	2	0	1	9
Bolton Street, Chorley	1	2	4	3	2	0	12
Pall Mall, Chorley	8	16	7	12	3	1	47

4.4.4 We provide a summary of the health checks for the district and local centres below, with full analysis and details provided at Appendices 4 and 6.

District Centres

Buckshaw Village

- 4.4.5 Buckshaw district centre serves an important function for the surrounding residents, in providing a range of commercial uses to meet day-to-day needs. The Tesco store provides a key facility meeting residents' convenience and in some instances, comparison shopping needs. There are a total of twelve commercial units in Buckshaw Village, dominated by the large Tesco Extra and a terrace of newly created commercial units. The national multiple operators present comprise the Tesco Extra, Subway, Barnado's and Pizza Hut, with a series of independent leisure and retail service operators including a barbers, a take away and café and a restaurant. The northern corner of the Tesco is occupied by a Class D2 soft play facility for children, and towards the eastern edge of the boundary is the Tesco Petrol Filling Station.
- 4.4.6 The wider defined centre boundary includes a range of non main town centre uses and as such, we recommend that the boundary is tightened to include just the principal uses. The area also benefits from a range of additional uses in close proximity, including an Aldi foodstore offering an additional choice for convenience shopping and two public houses.

STRENGTHS

- New, attractive modern village setting and very good environmental quality.

WEAKNESSES

- Small number of units and very limited range of goods and services.

OPPORTUNITIES

- Given the location of the centre, the district centre benefits from a captive local walk-in catchment, which could be built upon in terms of future development opportunities.

THREATS

- The Tesco dominates the centre, and may deter additional retail operators coming forward within the centre.

Clayton Green

- 4.4.7 Clayton Green District Centre performs an important role in catering for the retail and service needs of the residents across a wide catchment encompassing Clayton Green, Clayton Brook and parts of Whittle-le-Woods. Whilst there are only four retail and service units in the

centre, the large Asda store incorporates a large convenience and comparison goods retail offer and also performs a limited retail and financial service function.

- 4.4.8 The centre is also an important sports hub for this area of the borough, with Clayton Green Sports Centre located within the centre. However, the centre is dominated by Asda and the food and drink offer is also limited to a single pub and there are no independent retailers in the centre. Accordingly, there is a lack of consumer choice, and the centre would benefit from additional units to accommodate a greater number of retail and service operators.

STRENGTHS

- Large supermarket that provide a large range of convenience and comparison goods as well as a range of service uses.
- Sports centre that provides an important leisure facility for the local community and attracts residents to the centre.

WEAKNESSES

- Limited number of units and no small units of independent retail provision.
- Dominance of Asda in the centre restricting local consumer choice.
- Sprawling and car dominated layout of the centre.

OPPORTUNITIES

- Large residential catchment area and presence of anchor stores and facilities attracting residents to the centre.
- Given the expanse of car parking available, there may be opportunities for the development of part of the car parking area to provide new units in the vicinity of the Asda store and sports centre that are suitable for accommodating small and independent retail and service operators. The specific location of future development opportunities will be guided by the landowner's and retailer aspirations, but given the nature of the site, opportunities may lie within the northern part of the car park between the Asda and sports centre, also creating a better link between the two.

THREATS

- Dominance of the Asda store, insular layout and lack of visibility from the highway limiting attractiveness of the centre to new/additional operators.

Local Centres

- 4.4.9 A copy of the detailed local centre health checks are provided at Appendix 5, with the associated diversity of use plans and proposed boundaries at Appendix 6. We provide a brief summary of each of the health checks below.
- 4.4.10 It is noted that WYG is recommending that some of the local centres are deallocated as part of the local plan review process. This is due to a lack of overall offer and lack of real prospect to expand or redevelop. Whilst we note that it is important for residents to have easy access to local amenities, it is also important that defined centres are not continued to be protected when their offer does not provide for the range required for a local centre and neither will they be in a position to do so in the future. It may be that new local centres can be designated to replace those lost through the deallocation instead.

Balshaw Lane, Euxton

- 4.4.11 The centre is vital and viable. It performs an important role in catering for the needs of the local residential community. The mix of shops present in the local centre is typical of a centre of this size, with the centre largely providing a convenience and service role. The lack of vacant units in the centre is positive and demonstrates that there is a demand from operators to locate in this centre.

Bolton Street, Chorley

- 4.4.12 In terms of activity and composition, Bolton Street could be considered to be somewhat unhealthy as users are generally drawn to the Town Centre or nearby supermarkets. That being said, the proximity to major supermarkets and Chorley Town Centre does not appear to have impacted the centre in a negative manner in terms of vacancies, it does however seem to have impacted its composition being skewed more towards retail service and leisure service uses, acting more in a complimentary manner rather than a standalone centre.

Bury Lane, Withnell

- 4.4.13 We consider that the small number of units and range of goods and services on offer on Bury Lane are considered to perform below the level of a local centre. However, it is appreciated that Withnell is a rural village and the units that are present within Bury Lane Local Centre perform an important role in providing for the needs of residents living in this rural area.

Carrington, Eccleston

- 4.4.14 Carrington is considered to be a healthy local centre. The Carrington Centre, which forms the main part of the centre comprises a new parade of shops and is therefore visually appealing and well maintained. There is a sizeable car park located to the front of the centre meaning it is easy for people to make journeys to the centre via vehicle. The centre also benefits from a strong walk-in catchment. The centre appears to be popular with good levels of customers noted during our site visit. There is a good mix of shops and services for a centre of this size, including four national operators.

Chorley Old Road, Whittle-le-Woods

- 4.4.15 Chorley Old Road centre is not currently fulfilling a role as a local centre for residents as it does not include a range or mix of shops and services or even a convenience store. The long-term vacancy of one of the units in the centre and the more recent departure of two further operators indicates a lack of demand from operators to locate in the centre. We recommend that the designation of Chorley Old Road as a Local Centre is not maintained.

Chorley Road, Adlington

- 4.4.16 Chorley Road is considered to be a healthy centre. The local centre is one of the largest in the Borough of Chorley, and there is a good mix of retail and service units present in the centre. The centre appears well used with good levels of pedestrian flows witnessed during our visit and is served by CCTV, improving the overall perception of safety for pedestrians. The centre is considered to be accessible with good levels of environmental quality.

Collingwood Road, Chorley

- 4.4.17 The centre is served by just four commercial units, resulting in a lack of any real diversity of use. The overall offer does not meet day-to-day needs and it is not considered that the centre performs a local centre role in its current format. Footfall was limited, demonstrating the lack of choice and offer in the centre.

Coppull

- 4.4.18 Coppull is considered to be a healthy centre. There is a good mix and range of shops and services present in the centre. The centre performs an important role in serving the needs of the surrounding residential community and passing vehicular traffic. Although the environmental quality of the centre is reasonable, it is considered that the centre would

benefit from some subtle cosmetic improvements to shopfronts, public realm and the overall soft and hard landscaping throughout.

Croston

- 4.4.19 Croston is considered to be a very attractive local centre. The mix and range of units present in the centre is limited, and the centre largely performs a function in catering for leisure needs. Notwithstanding this, given the rural nature of Croston village, the local centre is considered to perform an important function in catering for the needs of the local residential community. Although the centre does not contain any convenience goods units, such uses are available elsewhere in the village.

Eaves Green, Chorley

- 4.4.20 Eaves Green has a very limited mix of commercial uses with no convenience or comparison retail offer within the centre. The chemist and restaurant will serve an important role for the surrounding residents but should the opportunity arise through vacancies or development opportunities, the provision of a convenience store and other retail and leisure service operators would better meet local residents' needs.

Eaves Lane North, Chorley

- 4.4.21 Eaves Lane North is considered to be a relatively vital and viable centre, with just one unit currently vacant. Whilst the offer does not provide a range of comparison retailers or convenience provision which would meet local's main food shopping needs, the presence of the Spar provides residents with the opportunity to purchase their day to day convenience goods. The Lloyds pharmacy provides an important amenity for local residents, as was evidenced on the day with shoppers visiting the retailer.

Eaves Lane South, Chorley

- 4.4.22 Eaves Lane South is considered to be a relatively vital and viable centre, with just two units currently vacant. Whilst the offer does not provide a range of comparison retailers or convenience provision which would meet local's main food shopping needs, the presence of the Londis provides residents with the opportunity to purchase their day to day convenience goods. There are also specialist retailers comprising the sewing shop and cake maker which add to the diversity of the centre, and which may act as a draw to the centre in their own right.

Eccleston

- 4.4.23 The health of Eccleston Local Centre is good, however, given the lack of convenience goods provision and the dispersed nature of retail and service units within the centre, Eccleston is not considered to perform the role of a local centre. The centre did not appear to be well used at the time of our site visit. We therefore recommend that the centre is de-allocate. This would not result in a gap in provision as Carrington Local Centre is located approximately 300m from Eccleston Local Centre.

Great Greens Lane, Clayton Brook

- 4.4.24 Great Greens Lane Local Centre performs an important role in providing the residents of Clayton Brook with access to a basic range of shopping and service facilities. The centre is accessible on foot, by public transport and car, and benefits from a good-sized car park. The lack of vacant units in the centre is positive and demonstrates that there is a demand from operators to locate in this centre. There are numerous trees and landscaped areas throughout the centre along a large green space in front of the shopping parade and attractive planters. The community centre has undergone a refurbishment in recent years. However, the overall environmental quality is relatively poor, with the centre suffering from a poor layout and the dated appearance of the shopping centre in particular, which would benefit from cosmetic improvements or refurbishment. Anti-social behaviour is also identified as an issue, and cleaning of the centre as well as the installation of additional CCTV to deter such behaviour is recommended.

Hall Gate, Astley Village

- 4.4.25 We consider that the small number of units and range of goods and services on offer in Hall Gate are considered to perform below the level of a local centre. However, the existing uses perform an important role for surrounding residents, particularly meeting day-to-day convenience shopping requirements and the provision of a pharmacy. Whilst the number of units falls below the typical quantum in a local centre, we do consider that the centre still continues to function in its intended form.

Harpers Lane, Chorley

- 4.4.26 Harpers Lane performs an important role in providing local retail and leisure service offers to the surrounding residential areas. The presence of the Aldi, Asda and Farmfoods is likely to have affected the provision of a convenience store in the centre but Bargain Booze goes

someway to meet this requirement. The centre was busy on the day of the visit and it is likely that it benefits from pass-by trips from shoppers visiting Alliance Retail Park on foot.

Lancaster Lane, Clayton-Le-Woods

- 4.4.27 Lancaster Lane Local Centre performs an important role in catering for the needs of the local residents within Clayton-le-Woods. The mix of shops present in the local centre is typical of a centre of this size, with the centre largely providing a convenience and service role. The lack of vacant units in the centre is positive and demonstrates that there is a demand from operators to locate in this centre. The overall environmental quality is reasonably good, but would benefit from cosmetic improvements to the shopping parade and residential properties above along with cleaning of the car park serving the parade.
- 4.4.28 The boundary encompasses some residential use to the north of Lancaster Lane and so we recommend that the boundary is tightened to remove these properties from the centre boundary.

Market Place, Adlington

- 4.4.29 Market Place is considered to be a vital and viable centre. The centre has a good number of shops and services compared to other local centres in the Borough and provides a mixed offer. Shop units within the centre are well-maintained, as is the public realm. The units which comprise the centre are located on a reasonably busy road, however, measures are in place to aid pedestrian movement.
- 4.4.30 It is noted that the defined town centre boundary for Market Place local centre was previously expanded to include the commercial uses adjacent to the east, with future aspirations to redevelop this part of the centre for a new foodstore. However, as this has not come forward to date and there is no indication that this would happen in the short to medium term at least, we do not consider it necessary to include this part of the centre within the boundary. Instead, should a future application progress for additional retail floorspace on the site, given its edge of centre location in any event, such a development would still have benefits to the centre whilst ensuring that the Council has sufficient control over the type and nature of development and the impact this could have on existing uses within the centre.

Mawdesley

- 4.4.31 There are only three units present in Mawdesley Local Centre. The narrow range of shops and services is such that Mawdesley is not considered to perform the role of a Local Centre. Notwithstanding this, it is acknowledged that the convenience store, public house and tea room perform an important function in catering for the day-to-day needs of the residential community in the village of Mawdesley.

Pall Mall, Chorley

- 4.4.32 Given its proximity to Chorley town Centre, Pall Mall does not fulfil the traditional role of a local centre. Instead, Pall Mall seems to have a complimentary relationship to the town centre in the sense that the uses, goods and services on offer do not generally have a presence in the main town centre (such as bulky electrical goods). The presence of a significant amount of leisure uses (including several hot food takeaways) hot food could also be attributed to Pall Mall being a major route in Chorley granting access to a wider area. Overall, the health is reasonable, but the retail offer Pall Mall contains gives the impression that most retailers are not frequented often.

Park Road, Chorley

- 4.4.33 Park Road does not perform its role as a local centre, with a limited provision of commercial uses and no convenience operators present. The centre does not perform a local role in serving residents. Our overall view is that the designation of the centre should be removed.

Pilling Lane, Chorley

- 4.4.34 Pilling Lane does not provide a mix of uses which would typically cater for the surrounding residents and therefore does not perform a typical local centre role. Given the nature of the centre and the limited mix of uses, we recommend that the centre's local centre designation is removed.

Runshaw Lane, Euxton

- 4.4.35 The centre is vital and viable. It performs an important role in serving the local residential community, as well as those passing by the centre by vehicle. The centre largely comprises convenience goods and leisure services units, which is to be expected for a centre of this size, and responds to the needs of the local community. The lack of vacant units within the centre indicates that there is demand from operators to locate in this centre. The

environmental quality of the centre is good, with the shops units well maintained and attractive greenery in the vicinity of the centre.

School Lane, Brinscall

- 4.4.36 The local centre is very small and is characterised by a number of standalone shop units located within the village rather than a concentrated shopping destination. We consider that the small number of units and range of goods and services on offer on School Lane are considered to perform below the level of a local centre. However, it is appreciated that Brinscall is a rural village and the units that are present within School Lane Local Centre perform an important role in providing for the needs of residents living in this rural area.

Steeley Lane, Chorley

- 4.4.37 Overall, we consider that Steeley Lane is a vital and viable centre with a good mix of commercial uses and it appears to be a popular centre for local residents and workers. The centre performs an important role and benefits from pass-by trips of residents walking to and from Chorley town centre via the underpass. The overall perception of safety is good, with active frontages onto the main pedestrian routes and the presence of CCTV. The centre also benefits from good access to the railway and bus stations.

Water Street, Chorley

- 4.4.38 Water Street is a small centre, providing just six commercial units. There is a convenience store providing local provision to meet day-to-day convenience needs and a range of leisure and business uses. Whilst the centre is limited in its overall offer, we do consider that it performs its intended role and serves the local population. The overall environmental quality was relatively good, and there is dedicated on-street car parking.

Wheulton

- 4.4.39 Wheulton Local Centre provides residents within the village with access to a basic and range of shopping and service facilities and performs an important role in serving the residents of the village. Typical for a centre of this size, the mix of uses present in the centre is limited. The vacant unit and evidence of former commercial properties changing to residential use indicates a limited demand for units in the centre.

5.0 Original Market Research

5.1 Introduction

- 5.1.1 A key requirement of this Study is the detailed understanding of shopping behaviour in respect of both convenience and comparison goods. To this end, WYG commissioned specialist market researchers NEMS to undertake a telephone survey of households to identify consumers' habits and preferences in the Study Area. The household survey enables us to identify the market share claimed by specific retail destinations (that is, the number of trips to, or expenditure at, a particular destination as a proportion of the total number of trips, or total expenditure), 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.
- 5.1.2 The undertaking of original market research enables an in-depth analysis of shopping behaviour at a local level, and allows the evaluation of the retail turnover and trade draw of particular 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.
- 5.1.3 We set out the general methodological approach to the household survey along with the key results below.

5.2 Household Survey

- 5.2.1 A survey of 1,800 households was undertaken in July and August 2018, which asked respondents 47 questions relating to their retail and leisure habits. The household survey questions and full tabulation of the results from the household survey are provided at Appendix 7.
- 5.2.2 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 shopping²⁰ and 'top up' food shopping²¹. For comparison goods, respondents were questioned in respect of where

²⁰ Which often takes the form of a 'trolley shop' and might be undertaken on a weekly basis

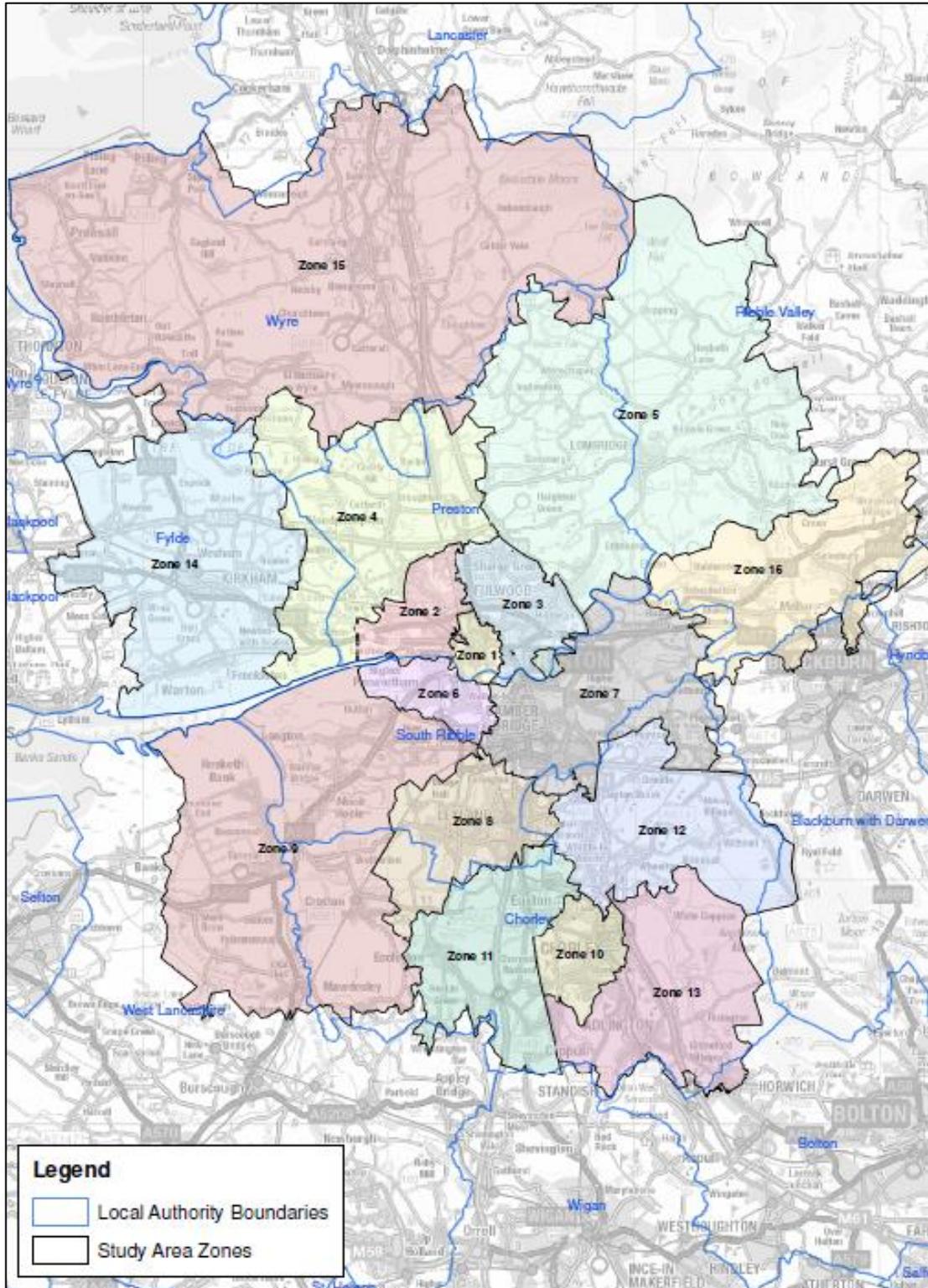
²¹ Which often takes the form of a 'basket shop' involving the purchase of grocery staples, such as milk and bread, and is generally undertaken on a more frequent basis

they last visited to purchase eight separate categories of comparison goods ('clothing and footwear'; 'CDs, DVDs and books'; 'small household goods'; 'toys and recreational goods'; 'chemist goods'; 'electrical goods'; 'DIY and gardening goods' and 'furniture'.

5.3 Study Area

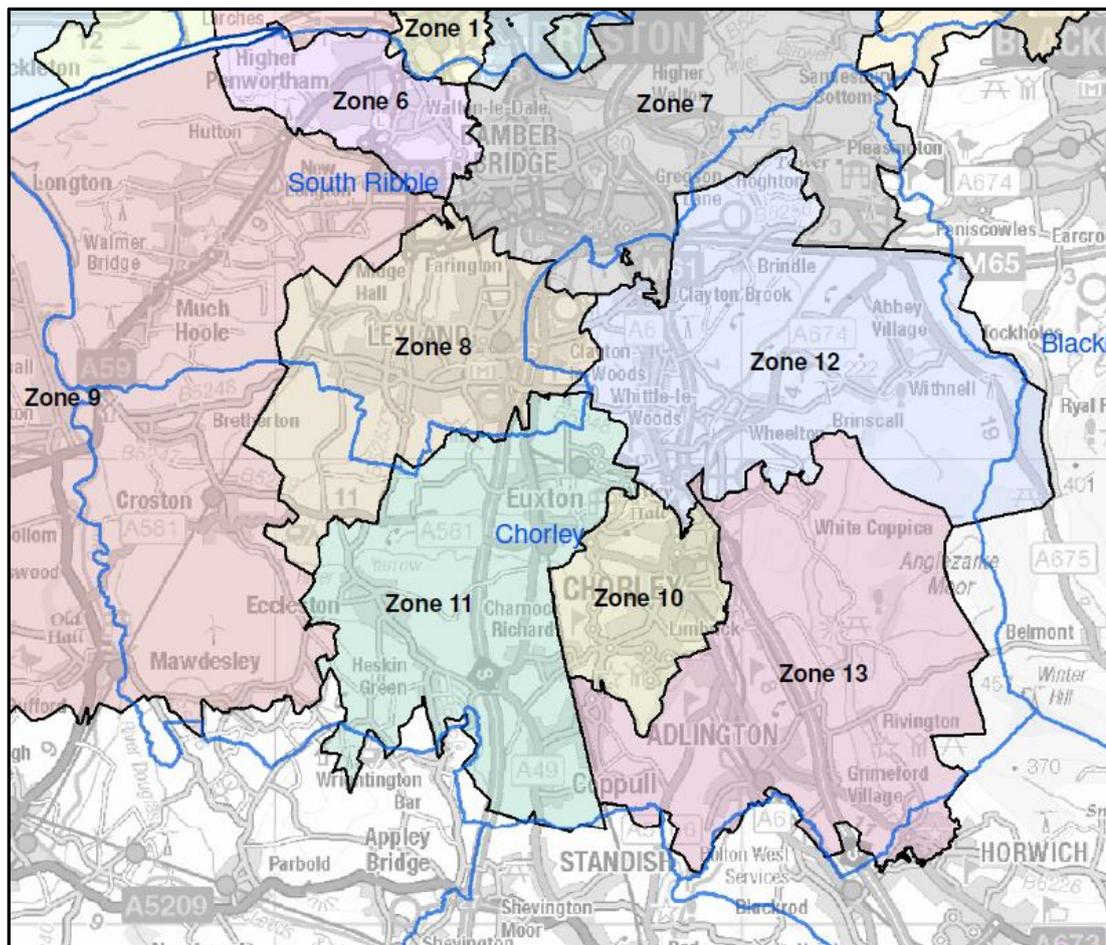
- 5.3.1 A plan of the Study Area for the household survey is provided at Appendix 1, which is reproduced in Figure 5.1 below.
- 5.3.2 The Study Area comprises 16 zones labelled 1 to 16. Zones 10, 11, 12 and 13 fall broadly within the Chorley administrative boundary, with part of Zones 8 and 9 also covered by Chorley.
- 5.3.3 In terms of Chorley's administrative area in particular, Zones 10 (Central Chorley), 11 (Eccleston and Euxton), 12 (Whittle-le-Woods and North West Chorley) and 13 (Adlington) are all located within the Borough's boundary, with parts of Zones 8 (Leyland) and 9 (Croston and South West South Ribble) also covering the administrative area.

Figure 5.1: Study Area



5.3.4 Figure 5.2 below provides a zoomed-in excerpt of the Study Area concentrating on Chorley’s administrative area, demonstrating how Chorley is covered by Zones 10, 11, 12 and 13 in their entirety, with parts of Zones 8 and 9 also included.

Figure 5.2: Excerpt of Study Area Covering Chorley’s Administrative Area



5.4 Assessment of Retail Shopping Patterns

5.4.1 The household telephone survey allows the assessment of the convenience and comparison goods shopping of residents across the Study Area. The household survey enables us to identify the market share of trips claimed by specific retail destinations, which we can then apply to the total convenience and comparison expenditure of residents to provide an assessment of the current pattern of retail expenditure.

5.4.2 The assessment of the current pattern of retail expenditure is provided in Tables 3 and 4 at Appendix 8 for convenience goods and Tables 11 to 29 for comparison goods. An associated step-by-step explanation is provided below and further details are also provided in Section 6 and in the notes accompanying the tables at Appendix 8.

Population

- 5.4.3 The population within each study area zone at the base year of 2018 as set out in Tables 1 and 9 at Appendix 8 was sourced from Experian Micromarketer G3 data (which was issued in December 2018).
- 5.4.4 Experian's projections for each of the Study Area Zones are based on 2017 based population estimates that accord with the findings of the 2011 Census release and population projections from 2017. Experian's methodology is based on a 'demographic component model' that takes into consideration current age and gender estimates and the Government's population projections. Future population projections reflect assumed birth and death rates, and net migration.

Expenditure

- 5.4.5 Per capita expenditure on convenience and comparison goods for each of the Study Area zones at 2017 (the most recent estimates available) was also sourced from Experian Micromarketer G3 data as set out in Table 1b and Table 9b at Appendix 8. We make a deduction from the expenditure per capita on convenience and comparison goods to take account of the proportion of expenditure spent through special forms of trading (i.e. expenditure that does not take place in shops, namely internet, catalogue or mail order shopping). The deduction for special forms of trading is based on the estimates for non-store retail sales (adjusted for sales from stores) provided by Experian in its Retail Planner Briefing Note 16 (December 2018), of 3.4% for convenience retail sales and 15.5% for comparison retail sales at 2017.
- 5.4.6 The 2017 per capita expenditure data (excluding spending on special forms of trading) was then rolled forward to the base year using the retail expenditure growth forecasts (excluding special forms of trading adjusted for sales via stores) provided by Experian in Retail Planner Briefing Note 16.
- 5.4.7 The total expenditure pot within each zone at 2018 is derived from the product of the population of each zone (as set out in Table 1a at Appendix 8 for convenience goods and Table 9a at Appendix 8 for comparison goods) and the per capita expenditure on convenience goods and each of the eight categories of comparison goods at 2018 (as set out in Table 1 at Appendix 8 for convenience goods and Tables 7C at Appendix 8 for comparison goods).

5.4.8 The total convenience goods expenditure by the residents of each zone is set out in Table 2a at Appendix 8. The total convenience goods expenditure at 2018 by the residents of each zone is then split between main and top-up food shopping in Table 2b at Appendix 8 based on residents' typical weekly spend on main and top-up food shopping as determined from the household survey. The Study Area residents' convenience goods expenditure in the 2018 base year amounts to a total of £1,096.1m, of which £891.4m (81.3%) of the total convenience goods expenditure is spent on main-food shopping and £204.7m (18.7%) is spent on top-up food shopping.

5.4.9 The total comparison goods expenditure by the residents of each zone along with the total spending in each of the eight categories of comparison goods is set out in Table 8A at Appendix 8. In total, approximately £1,555.4m of comparison goods expenditure is available to residents of the study area in the 2018 base year of which:

- £421.2m, or 27% is spent on clothing and footwear goods;
- £74.9m, or 5% is spent on CDs, DVDs and books;
- £181.3m, or 12% is spent on small household goods;
- £207.1m or 13% is spent on recreation goods and toys;
- £206.2m or 13% is spent on chemist goods;
- £243.4m, or 16% is spent on electrical goods;
- £86.4, or 6% is spent on DIY and gardening goods; and
- £134.9m or 9% is spent on furniture goods.

Pattern of Retail Expenditure

5.4.10 For convenience goods, the total main and top-up expenditure by the residents of each zone (Table 2b) is then applied to the percentage shopping patterns identified from the household survey (Table 3) to estimate the pattern of main and top-up convenience goods spending by the Study Area residents (Table 4a). Table 4b sums the spending on main and top-up shopping to provide an overall pattern the convenience goods spending in monetary terms and in percentage terms.

5.4.11 For comparison goods, the total expenditure by the residents of each zone on each of the eight categories of comparison goods (Table 8) is then applied to the percentage shopping patterns identified for the associated category of comparison goods from the household survey (Tables 11, 13, 15, 17, 19, 21, 23, 25) to estimate the pattern of spending by the

Study Area residents for each category of comparison goods (Tables 12, 14, 16, 18, 20, 22, 24 and 26). Table 27 sums the spending across the eight categories of comparison goods shopping to provide an overall pattern the convenience goods spending in monetary terms, as well as in percentage terms (Table 28).

- 5.4.12 It is emphasised that our assessment of current shopping patterns relates to the Study Area residents and 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).

5.5 Convenience Goods Shopping Patterns

Main Destinations for Convenience Goods Expenditure

- 5.5.1 Table 5.1 below provides the main convenience destinations in terms of convenience goods expenditure both within and outside of the Study Area.
- 5.5.2 The Table demonstrates that the principal destination for convenience goods expenditure is the Asda at Pittman Way in Preston, which attracts 6.6% of all available convenience goods expenditure or £72.3m. This is followed by the Morrisons at Mariners Way in Preston which attracts 5.9% or £64.6m.
- 5.5.3 In terms of destinations in the Borough of Chorley, the Tesco at Ackhurst Industrial Park attracts a total of 4.7% of the available convenience expenditure from the Study Area or £50.1m, followed by the Morrisons at Brooke Street which attracts 3.4% or £36.8m and the Asda at Clayton Green which attracts 3.4% of £36.7m.
- 5.5.4 Both of the Aldi stores in Buckshaw (Zone 11) and on Harpers Lane (Zone 10) attract over 2.0% of the available expenditure within the Study Area and are trading very well.

Table 5.1: Main Destinations for Convenience Goods Expenditure Inside Study Area

Destinations	Zone	2018 Study Area Residents' Expenditure £m	2018 Market Share of Study Area %
Destinations within Chorley Borough			
Tesco Extra, Ackhurst Industrial Park, Foxhole Road, Chorley	10	50.1	4.7%
Morrisons, Brooke Street, Chorley	10	36.8	3.4%
Asda, Clayton Green Centre, Sheephill Lane, Clayton Green	12	36.7	3.4%
Aldi, Lancaster Way, Buckshaw	11	25.6	2.4%
Aldi, Harpers Lane, Chorley	10	22.1	2.0%
Asda, Bolton Road, Chorley	10	13.5	1.2%
Asda, Water Street, Ringway, Chorley	10	9.7	0.9%
Booths, New Market Street, Chorley	10	7.6	0.7%
Tesco Superstore, Ordnance Road, Buckshaw	11	7.0	0.6%
Destinations Outside of Chorley Borough			
Asda, Pittman Way, East Way, Fulwood, Preston	3	72.3	6.6%
Morrisons, Mariners Way, Riversway, Preston	2	64.6	5.9%
Sainsbury's Superstore, Flintoff Way, Preston	3	41.6	3.8%
Morrisons, Olympian Way Retail Park, Olympian Way, Leyland	8	37.6	3.5%
Aldi, Deepdale Shopping Park, Blackpool Road, Preston	3	33.1	3.0%
Sainsbury's Superstore, Cuerden Way, Bamber Bridge	7	32.7	3.0%
Tesco Extra, Towngate, Leyland	8	30.7	2.8%
Aldi, Cuerden Way, Bamber Bridge	7	29.0	2.7%
Morrisons, Mill Street, off Poulton Street, Kirkham	14	25.2	2.3%
Aldi, Moss Lane, Garstang	15	24.2	2.2%
Aldi, Towngate, Leyland	8	21.4	2.0%

Notes: Table 5 of Appendix 8

5.5.5 Looking at principal destinations for residents in Zones 10, 11 and 12, 25.9% or £20.4m of available expenditure in Zone 10 is spent at the Tesco Extra at Foxhole Road, also located in Zone 10, followed by 18.7% or £14.7m which is spent at the Morrisons at Brooke Street. For residents in Zone 11, 26.7% or £17.3m of available convenience expenditure is spent at the Tesco at Foxhole Road, followed by 22.6% or £14.7m which is spent at the Aldi on Lancaster Way in Buckshaw. Finally, in terms of Zone 12 residents, 22.9% or £9.9m is spent at the Asda in Clayton Green, followed by 18.9% or £8.1m which is spent at the Morrisons on Brooke Street.



Main Destinations for 'Main Food' Expenditure by Zone

- 5.5.6 Table 5.2 below provides the top two destinations for residents in each respective zone for main food shopping, and sets out the location of each of these destinations. For the purposes of this Study, we have concentrated on residents located in Zones 9 to 13 to establish where they choose to visit to undertake their main food shops.
- 5.5.7 The market shares associated with main food shopping trips from residents in Zone 9 demonstrate that the principal destinations are the Tesco Extra in Leyland which attracts 10.2% of the Zone 9 residents' expenditure, followed by the Booths at Hesketh Bank which attracts 7.8%. The overall main food market share of residents in Zone 9 is spread across a number of main food destinations, principally located in Zones 7 and 8.
- 5.5.8 In terms of residents in Zone 10, which covers Chorley town centre, the main destinations for main food shopping are the Tesco Extra on Foxhole Road and the Morrisons on Brooke Street which attract 27.1% and 20.8% of main food shopping trips respectively. A total of 87.5% of main food shopping trips from residents in Zone 10 are attracted to destinations also located in Zone 10, also including the Aldi at Harpers Lane (15.2%), the Asda on Bolton Road (9.8%) and the Booths at Market Walk (4.5%).
- 5.5.9 Looking at Zone 11, which covers Euxton and Eccleston, the principal main food destination for residents is the Tesco Extra on Foxhole Road which attracts 28.1% of all main food shopping trips, followed by the Aldi in Buckshaw which attracts 23.8% of all main food trips.

Table 5.2: Main Destinations for 'Main' Food Expenditure by Zone

Zone	Main Destinations	Location of Store
9	Tesco Extra, Towngate, Leyland (10.2%) Booths, Hesketh Bank (7.8%)	Zone 8 Zone 9
10	Tesco Extra, Foxhole Road, Chorley (27.1%) Morrisons, Brooke Street, Chorley (20.8%)	Zone 10 Zone 10
11	Tesco Extra, Foxhole Road, Chorley (28.1%) Aldi, Lancaster Way, Buckshaw (23.8%)	Zone 10 Zone 11
12	Asda, Clayton Green Centre (23.8%) Morrisons, Brooke Street, Chorley (20.7%)	Zone 12 Zone 10
13	Aldi, Mason Street, Horwich (19.5%) Morrisons, Brooke Street, Chorley (18.4%)	OSA Zone 10

Source: Table 3 at Appendix 8

- 5.5.10 Looking at local retention rates on a zonal basis, we can see that the highest retention rate is within Zone 10, which retains 87.5% of all main food shopping trips. This retention level



drops substantially for Zones 11 and 12 and more so in Zones 9 and 13. The leakage of main food shopping trips of residents in Zones 9, 11, 12 and 13 to destinations outside of these zones demonstrates that from a qualitative point of view there may be potential to improve the provision of main food destinations. We explore this in more detail below.

Table 5.3: Main Food Retention Rates by Zone

Zone	Main Food Retention
9	12.4%
10	87.5%
11	32.0%
12	23.8%
13	1.4%

Source: Table 3 at Appendix 8

Main Destinations for Top-Up Food Shopping by Zone

- 5.5.11 Table 5.3 sets out the principal destinations for top-up food shopping for residents in Zones 9 to 13. We can see that smaller convenience retailers start to be principal destinations for top-up shopping, with the Co-op in Zone 9, 12 and 13 comprising one of the top two destinations. This demonstrates that residents often travel shorter distances, regularly on foot, and to smaller local convenience stores to meet their top-up food shopping requirements. In short, having an extensive offer and the cheapest price available is not as important to residents when purchasing top-up shopping (bread, milk etc), and instead, shoppers often seek destinations which will be quick to visit (i.e. smaller queues) to purchase such goods.
- 5.5.12 However, whilst the above is often the case, for residents in Zone 10 and 11, the principal destination for top-up shopping is the Tesco Extra at Foxhole Road which attracts 21.1% and 20.1% respectively. The Tesco Extra is a highly accessible store located in between a number of residential areas.



Table 5.3: Principal 'Top-up' Food Shopping Destinations by Zone

Zone	Main Destinations	Location of Store
9	Booths, Station Road (14.4%) Co-op, Tarleton (10.2%)	Zone 9 Zone 9
10	Tesco Extra, Foxhole Road, Chorley (21.1%) Asda, Bolton Street, Chorley (13.7%)	Zone 10 Zone 10
11	Tesco Extra, Foxhole Road, Chorley (20.1%) Aldi, Lancaster Way, Buckshaw (16.8%)	Zone 10 Zone 11
12	Asda, Clayton Green (18.7%) Co-op, Chorley Old Road (15.5%)	Zone 12 Zone 12
13	Co-op, Bolton Road, Adlington (15.3%) Tesco Express, Chorley Road, Adlington (12.6%)	Zone 13 Zone 13

Source: Table 3 at Appendix 8

5.5.13 Finally, in analysing convenience goods expenditure within the Study Area, it is useful to look at the proportion of convenience expenditure from each zone which is spent at convenience destinations located within Chorley Borough. Table 5.5 below sets out the total available convenience expenditure within Zones 9 to 13, the proportion of expenditure spent at destinations in the Borough and what this equates to in terms of market share.

5.5.14 We can see that residents in Zones 11, 12 and 13 spend the highest proportion of available convenience expenditure at destinations within the Borough, equating to a market share of 94.3%, 82.6% and 90.1% respectively. These high retention rates of market share demonstrate that there is relatively little leakage to convenience destinations located outside of the Borough from these residents. The level of retained market share in Zones 9 and 13 is substantially lower at 9.4% and 56.7% respectively. As these Zones are located on the periphery of Chorley borough, residents are choosing to shop elsewhere outside of the Borough for convenience goods.

5.5.15 Table 5.5 further shows that existing facilities within the Chorley Local Authority Area attract a market share of 21.6% (£237.1m) of the total £1,096.1m of convenience goods expenditure generated by residents of the Study Area. Some 24.1%²² of the total population within the Study Area is resident within Chorley. As noted above, we typically expect the convenience goods shopping needs of residents to be met locally and would expect the overall market share of destinations in Chorley to be comparable to the proportion of the Study Area population resident within this area. This is due to residents generally shopping locally (i.e. within a five minute drivetime) to meet their convenience shopping needs. The

²² Derived from 2018 population projections sourced from Experian Micromarketer G3 data.



market share of 21.6% therefore appears broadly consistent with the proportion of the Study Area’s population which is located within Chorley Borough.

Table 5.5: Chorley Borough Market Share of Expenditure at 2018 – Convenience Goods

Zone	Total Convenience Expenditure £m	Spending in Chorley Borough £m	Chorley Borough Market Share %
9	79.3	7.5	9.4%
10	78.8	74.2	94.3%
11	64.8	53.6	82.6%
12	43.1	38.8	90.1%
13	50.7	28.7	56.7%
Study Area Total	1,096.1	237.1	21.6%

Notes: Sourced from Tables 2 and 5at Appendix 8

5.6 Comparison Goods Shopping Patterns

Main Destinations for Comparison Goods Expenditure in Chorley Borough

- 5.6.1 Turning to comparison goods shopping patterns, Table 5.6 below firstly looks at the principal destinations for comparison shopping for all residents within the Study Area, looking at destinations located within and outside of the Study Area.
- 5.6.2 In terms of comparison destinations located within the Borough, the principal destination is Chorley town centre which attracts 6.6% or £102.6m of all available expenditure. This is followed by the Tesco Extra which attracts 1.6% or £24.5m of available comparison expenditure and then Asda at Clayton Green which attracts 0.9% or £13.7m.
- 5.6.3 Looking elsewhere in the Study Area but outside of Chorley Borough, the principal destination is Preston City Centre which attracts 22.5% or £350.7m of all available comparison expenditure, followed by Deepdale Shopping Park which attracts 11.3% or £175.4m of all available comparison expenditure.

Table 5.6: Main Destinations for Comparison Goods Expenditure within Chorley Borough

Destinations	2018 Study Area Residents' Expenditure £m	2018 Market Share %
Chorley Borough		
Chorley Town Centre	102.6	6.6%
Tesco Extra, Ackhurst Industrial Park, Chorley	24.5	1.6%
Asda, Clayton Green Centre, Clayton Green	13.7	0.9%
B&Q, Highfield Industrial Estate, Chorley	10.3	0.7%
Alliance Retail Park, Chorley	6.9	0.4%
Asda, Bolton Street, Chorley	6.1	0.4%
Elsewhere in Study Area		
Preston City Centre	350.7	22.5%
Deepdale Shopping Park, Blackpool Road, Preston	175.4	11.3%
Capitol Retail Park, Capitol Way, Walton-le-Dale	70.1	4.5%
Leyland Town Centre	42.5	2.7%
Outside Study Area		
Middlebrook Retail & Leisure Park, Horwich, Bolton	62.6	4.0%
Blackburn Town Centre	42.3	2.7%
Trafford Centre	24.0	1.5%

Notes: Tables 27 and 28 of Appendix 8

- 5.6.4 Looking at comparison shopping patterns of residents in Zones 10, 11 and 12 (which are located in their entirety within the Borough's boundary), the principal destination for each zone is Chorley town centre, which attracts 36.1%, 16.6% and 33.1% of comparison expenditure respectively. However, within Zones 10 and 11, a high proportion of the available comparison expenditure (13.5% and 15.2% respectively) is also attracted to Middlebrook Retail Park and for Zone 12, 13.5% of all comparison trips are attracted to Preston city centre.

Comparison Goods Expenditure Retention within the Study Area

- 5.6.5 Table 5.7 below sets out the comparison goods expenditure retention and leakage, as was demonstrated for convenience expenditure above. The Table demonstrates that a total of £181.9m of comparison expenditure is retained within Chorley Borough, which equates to 12.9% of the total available expenditure across the Study Area. A further £875.2m is spent at destinations within the Study Area but outside of Chorley Borough. Of the expenditure

attracted to destinations within the Borough (£200.9m), 51.0% of this, or £102.6 is spent in Chorley town centre and a further 12.3%, or £24.5m is spent at Tesco Extra on Ackhurst Industrial Park.

Table 5.7: Comparison Goods Expenditure Retention and Leakage

Destinations	2018 Study Area Residents' Expenditure £m	2018 Market Share %
Inside Study Area		
Inside Chorley Borough	£200.9m	12.9%
Outside Chorley Borough	£963.0m	61.9%
All Destinations Inside Study Area	£1,163.9m	74.8%
Outside Study Area		
All Destinations Outside Study Area	£391.5m	25.2%
Total	£1,555.4m	100.0%

Notes: Tables 27 and 28 from Appendix 8

Comparison Goods Expenditure Retention within Chorley Borough

- 5.6.6 Table 5.8 provides a breakdown of the market share of residents in Zones 9 to 13 which is retained within Chorley Borough (i.e. the proportion of comparison expenditure which is spent at existing destinations located within the Borough’s administrative area).
- 5.6.7 The highest retention level of comparison expenditure is from residents in Zone 10, from which a total of 64.1% of the available expenditure is spent at destinations in the Borough. Of the available expenditure from residents in Zone 10, 36.1% is spent within Chorley town centre, with a further 8.9% at the Tesco on Foxhole Road, 3.5% at the B&Q in Chorley and 2.7% at both Alliance Retail Park and the Asda on Bolton Street. A total of 58.6% of comparison expenditure from residents in Zone 10 is spent at destinations also located in Zone 10. Looking outside of the Study Area, 13.5% of Zone 10 residents’ expenditure is being spent at Middlebrook Retail Park.
- 5.6.8 Looking at residents in Zone 11, a total of 31.7% of the available expenditure is spent at destinations in Zone 10, with a further 9.9% spent at destinations in Zone 11. The principal destination for comparison expenditure from residents in Zone 11 within the Borough is Chorley town centre (16.6%) followed by the Tesco Extra on Foxhole Road (7.0%). However, 15.2% of Zone 11 residents expenditure is being spent at Middlebrook Retail Park.
- 5.6.9 Finally, turning to Zone 12 shopping patterns, 33.1% of available expenditure is being spent in Chorley town centre and 13.5% is being spent in Preston city centre.

Table 5.8: Comparison Goods Spending Market Share of Chorley Zones by Zone

Zone	2018 Total Comparison Expenditure £m	2018 Spending in Chorley Borough £m	2018 Chorley Borough Market Share %
9	118.9	6.3	5.3%
10	104.4	64.1	61.4%
11	103.0	44.3	43.0%
12	65.8	32.0	48.6%
13	69.3	23.3	33.6%
Study Area Total	1,555.4	200.9	12.9%

Notes: Table 27 of Appendix 8

Categories of Comparison Goods Shopping

5.6.10 It is also useful to look at the proportion of retention of expenditure within Chorley Borough of the eight separate categories of comparison goods. Table 5.9 below provides a breakdown of the market share for each of the eight categories attracted to the principal comparison destinations both within and outside of the Study Area. We can see that the highest retention rate of comparison goods expenditure in the town centre is from furniture spending (13.5%) followed by electrical goods (11.4%).

5.6.11 In terms of the retention within the Borough as a whole, the highest proportion is within the DIY and gardening sector at 19.7%, followed by furniture goods (18.8%).

Table 5.9: Main Destinations for Comparison Goods Shopping Patterns within Chorley Borough

Destinations	Market Share of Study Area Residents' Expenditure								
	Clothing & Footwear	Books/CDs/DVD	Small Household	Recreation	Chemist	Electrical	DIY & Gardening	Furniture	All Comparison
Chorley Town Centre	3.9%	7.5%	3.4%	5.7%	8.8%	11.4%	2.7%	13.5%	6.5%
Chorley Borough Retention	7.1%	16.1%	8.4%	10.4%	19.8%	18.4%	19.7%	18.8%	12.8%

Notes: Tables 11, 13, 15, 17, 19, 21, 23, 25 and 27 of Appendix 8

5.6.12 We provide below a summary in respect of each type of goods and the shopping patterns of residents in Zones 10, 11 and 12 in particular (i.e. those zones which are located within the Borough).

Clothing and Footwear Shopping Patterns

5.6.13 Looking firstly at shopping patterns in Zone 10, it is useful to concentrate on the patterns associated with purchasing clothing and footwear goods, given the high proportion of comparison expenditure which is attributed to these goods by residents. Within the Study Area, a total of 25.0% of all clothing and footwear shopping trips are attracted to Chorley town centre from residents in Zone 10, followed by Preston city centre which attracts 6.5% of clothing and footwear trips. However, a total of 25.6% of trips are 'leaking' to Middlebrook Retail Park and in total, 49.2% of residents are choosing destinations outside of the Study Area to shop for clothing and footwear goods. For Zone 11, 14.6% of residents choose Chorley town centre to purchase clothing and footwear, and 19.2% choose Preston city centre. Again, 17.6% are choosing Middlebrook Retail Park to purchase clothing and footwear and a total of 48.1% choose destinations outside of the Study Area. Finally, turning to Zone 12,

5.6.14 Table 5.10 below provides a summary of the proportion of clothing and footwear shopping trips which are retained in the Borough and the Study Area and the proportion which is leaking to destinations outside of the Study Area to competing destinations (principally Middlebrook Retail Park).

Table 5.10: Clothing and Footwear Trips To Principal Destinations

	9	10	11	12	13
Chorley Town Centre	1.0%	25.0%	14.6%	15.5%	8.6%
Total in Chorley Borough	1.9%	36.3%	25.0%	20.7%	16.0%
Preston city centre	37.1%	6.5%	19.2%	23.6%	2.4%
Deepdale Shopping Park	5.9%	4.3%	1.9%	4.7%	0.0%
Total in Study Area	56.5%	50.8%	51.9%	51.0%	21.6%
Middlebrook Retail Park	2.7%	25.6%	17.6%	14.5%	19.4%
Trafford Centre, G.Manchester	2.5%	9.1%	1.1%	6.8%	12.2%
Wigan town centre	0.0%	2.9%	8.5%	1.7%	15.1%
Total Outside Study Area	43.5%	49.2%	48.1%	49.0%	78.4%

Notes: Chorley town centre includes Market Walk and Preston city centre includes shopping centre destinations

CD and DVDs Goods Shopping Patterns

5.6.15 Turning to CDs, DVDs and Books, Table 5.11 below demonstrates that the highest retention rate within Chorley Borough is from residents in Zone 12 at 69.9%, from which the highest proportion of trips travel to Chorley town centre (43.0%). Tesco Extra in Chorley performs an important role in providing a retail destination for purchasing CDs, DVDs and books,

attracting 20.0% of all trips from Zone 10 and 24.2% trips from Zone 11. Overall, the retention rate in Chorley Borough and the Study Area as a whole within Zones 9 to 13 is higher than for clothing and footwear goods, perhaps demonstrating that the retail offer for such goods better meets residents' requirements.

Table 5.11: CDs, DVDs, Books Goods Trips To Principal Destinations

	9	10	11	12	13
Chorley town centre	0.0%	25.0%	2.7%	43.0%	31.3%
Tesco Extra, Chorley	0.0%	20.0%	24.2%	8.4%	5.7%
Total in Chorley Borough	2.4%	58.3%	50.3%	69.9%	45.9%
Deepdale Shopping Park	8.1%	5.7%	0.0%	0.0%	0.0%
Preston city centre	30.1%	11.6%	7.0%	22.8%	6.8%
Total in Study Area	65.1%	77.2%	63.4%	92.7%	54.8%
Total Outside Study Area	34.9%	22.8%	36.5%	7.3%	45.2%

Notes: Chorley town centre includes Market Walk and Preston city centre includes shopping centre destinations

Household Goods Shopping Patterns

5.6.16 The respective figures for household goods shopping patterns are provided in Table 5.12 below. The table demonstrates that the proportions of trips attracted by the principal centres of Chorley and Preston are substantially lower than for clothing and footwear and CDs as set out above. Instead, a higher proportion of shoppers choose to visit large format foodstores to meet their household good requirements, given the substantial offer available at such retailers.

Table 5.12: Household Goods Trips To Principal Destinations

	9	10	11	12	13
Chorley town centre	2.1%	9.9%	6.1%	19.5%	13.5%
Total in Chorley Borough	7.6%	39.3%	16.8%	28.4%	14.9%
Capitol Retail Park	10.4%	6.8%	8.3%	11.3%	1.4%
Deepdale Shopping Park	0.0%	6.1%	0.0%	5.0%	6.3%
Preston city centre	14.7%	4.2%	8.6%	12.1%	1.8%
Total in Study Area	65.1%	77.2%	63.4%	92.7%	54.8%
Total Outside Study Area	34.9%	22.8%	36.5%	7.3%	45.2%

Notes: Chorley town centre includes Market Walk and Preston city centre includes shopping centre destinations

Recreation Goods Shopping Patterns

5.6.17 Turning to recreational goods, Table 5.13 below demonstrates that a total of 40.9% of residents from Zone 10 choose Chorley town centre to meet their recreation goods shopping needs. The proportion of residents choosing Chorley town centre in Zones 11 and 12 is substantially lower at 11.7% and 22.2% respectively, with no residents in Zone 9 choosing Chorley town centre to purchase recreation goods. In total, 60.6% of residents in Zone 10 choose destinations in Chorley Borough to purchase recreation goods but just 19.3% in Zone 11 and 38.7% in Zone 12 choose Chorley Borough destinations. The highest level of leakage outside of the Study Area from these five Zones is from residents in Zone 11, from which 60.1% of all trips travel to destinations outside of the Borough, including 35.4% choosing Middlebrook Retail Park and a further 8.3% choosing Robin Retail Park in Wigan. These patterns are not uncommon, given the extensive range of recreation and sports goods which are often sold from retailers located on retail parks (Decathlon, Go Outdoors, Sports Direct and so on).

Table 5.13: Recreational Goods Trips To Principal Destinations

	9	10	11	12	13
Chorley town centre	0.0%	40.9%	11.7%	22.2%	4.4%
Tesco Extra, Chorley	0.0%	10.3%	2.3%	6.3%	8.8%
Total in Chorley Borough	0.0%	60.6%	19.3%	38.7%	15.1%
Preston city centre	18.4%	3.9%	10.5%	17.2%	1.5%
Total in Study Area	64.9%	64.5%	39.9%	75.5%	16.6%
Middlebrook Retail Park	3.1%	22.9%	35.4%	8.1%	44.6%
Total Outside Study Area	35.1%	35.5%	60.1%	24.5%	83.4%

Notes: Chorley town centre includes Market Walk and Preston city centre includes shopping centre destinations

Chemist Goods Shopping Patterns

5.6.18 The overall retention levels for purchasing chemist goods is substantially higher than the majority of comparison goods, given that residents will typically travel short distances to purchase such goods, at local chemists, town centres or supermarkets. As we can see in Table 5.14 below, the retention in Chorley Borough for Zones 10, 11 and 12 is above 80% in each case and the retention in the Study Area as a whole is over 90% in each case, representing very sustainable patterns of shopping. In Zone 10, the principal destination is Chorley town centre which attracts 58.6% of all trips for chemist goods, as is the case for residents in Zone 12, where the town centre attracts 53.0% of all trips. The principal destination for residents in Zone 11 is Buckshaw district centre, which attracts 16.4% of all shopping trips for chemist goods, followed by the Tesco Extra in Chorley.

Table 5.14: Chemist Goods Trips To Principal Destinations

	9	10	11	12	13
Chorley town centre	1.5%	58.6%	14.3%	53.0%	29.3%
Tesco Extra, Chorley	0.0%	15.8%	15.3%	4.6%	8.2%
Total in Chorley Borough	9.6%	89.4%	84.9%	80.4%	61.1%
Preston city centre	20.5%	1.7%	0.0%	6.2%	0.0%
Total in Study Area	80.9%	91.1%	93.3%	95.3%	61.1%
Total Outside Study Area	19.1%	8.9%	6.7%	4.7%	39.0%

Notes: Chorley town centre includes Market Walk and Preston city centre includes shopping centre destinations

Electrical Goods Shopping Patterns

5.6.19 Table 5.15 below looks at the electrical goods shopping patterns for residents in Zones 9 to 13 and particularly, the proportion of trips which are retained within the Borough, the proportion within the Study Area and the level of leakage outside of the Study Area. The highest retention rate of electrical goods is from Zone 10 residents, from which 87.0% of all trips are retained by Chorley Borough’s existing retail destinations and 95.0% are retained within the Study Area as a whole. A total of 55.7% of these trips are attracted to Chorley town centre, followed by 19.2% which are attracted to Alliance Retail Park. A total of 54.2% of Zone 12 residents also last chose Chorley town centre for electrical goods shopping.

Table 5.15: Electrical Goods Trips To Principal Destinations

	9	10	11	12	13
Chorley town centre	3.8%	55.7%	32.5%	54.2%	27.9%
Alliance Retail Park	1.5%	19.2%	8.7%	5.2%	7.9%
Total in Chorley Borough	10.2%	87.0%	66.4%	63.6%	48.9%
Preston city centre	16.5%	1.9%	2.2%	6.9%	0.0%
Deepdale Shopping Park	2.9%	2.3%	1.8%	2.7%	0.0%
Total in Study Area	70.8%	95.0%	77.7%	86.5%	50.0%
Middlebrook Retail Park	0.0%	4.2%	7.0%	3.4%	36.6%
Total Outside Study Area	29.2%	5.0%	22.3%	13.6%	50.0%

Notes: Chorley town centre includes Market Walk and Preston city centre includes shopping centre destinations

DIY Goods Shopping Patterns

5.6.20 Turning to DIY goods, Table 5.16 below includes the two B&Q stores at Bamber Bridge and Highfield Industrial Park which both absorb high proportions of the DIY shopping trips within Zones 9 to 13. In particular, the B&A at Highfield Industrial Park absorbs high proportions of

trips for such goods from residents in Zones 10 to 13, where the proportion is as high as 63.8% from Zone 10. The overall retention in the Borough is as high as 92.0% from residents in Zone 10 and for Zones 11 to 13 the Borough retention is above 65% in each case. Overall, the level of leakage of trips outside of the Borough and indeed the Study Area is limited.

Table 5.16: DIY Goods Trips To Principal Destinations

	9	10	11	12	13
Chorley town centre	0.0%	12.6%	4.1%	12.9%	14.4%
B&Q, Highfield Industrial Park, Chorley	0.0%	63.8%	52.7%	47.1%	40.2%
Total in Chorley Borough	5.6%	92.0%	66.5%	67.9%	69.0%
B&Q, Craven Drive, Bamber	28.2%	1.2%	15.1%	23.9%	4.3%
Preston city centre	12.4%	0.0%	0.0%	0.0%	0.0%
Total in Study Area	88.5%	96.7%	98.3%	97.9%	73.3%
Middlebrook Retail Park	0.0%	1.7%	0.9%	0.0%	16.3%
Total Outside Study Area	11.5%	3.3%	1.7%	2.1%	26.7%

Notes: Chorley town centre includes Market Walk and Preston city centre includes shopping centre destinations

Furniture Goods Shopping Patterns

5.6.21 Finally turning to the last bulky comparison sub-category, we can see from Table 5.17 below that Chorley town centre again performs an important role in meeting residents’ shopping needs to purchase furniture goods. The highest proportion of shopping trips attracted to Chorley town centre is from residents in Zone 12, from which 59.6% choose the town centre to purchase furniture, followed by 49.2% in Zone 10. The proportion of leakage of furniture shopping trips is relatively low for residents in Zones 10 to 12 at 16.0%, 20.4% and 7.2% respectively.

Table 5.17: Furniture Goods Trips To Principal Destinations

	9	10	11	12	13
Chorley town centre	6.8%	49.2%	32.8%	59.6%	26.8%
Total in Chorley Borough	6.8%	64.3%	46.1%	71.3%	41.8%
Preston city centre	18.9%	4.5%	0.0%	6.9%	0.0%
Total in Study Area	55.6%	84.0%	79.6%	92.8%	51.5%
Middlebrook Retail Park	1.8%	6.9%	10.0%	1.5%	32.5%
Total Outside Study Area	44.4%	16.0%	20.4%	7.2%	48.5%

Notes: Chorley town centre includes Market Walk and Preston city centre includes shopping centre destinations

5.7 Customer Behaviour

5.7.1 The results of the household survey are useful in understanding customer behaviour in terms of how people undertake their convenience and comparison goods shopping. When respondents to the household survey were asked to provide the principal reason they choose to undertake their main food shopping at a particular store, the following responses were given:

- 33.3% of respondents stated that their chosen store was near to home;
- 15.3% stated that the store offered lower prices;
- 7.7% stated it was due to the choice of food goods; and
- 6.7% stated that it was due the quality of food goods available.

5.7.2 In total, 39.3% of respondents travel between 1 and 5 minutes to undertake their main food shop, and 31.3% travel between 6 to 10 minutes to undertake their main food shop. A total of 79.5% of respondents travel by car (as a driver) to their main food shopping destination and 7.5% walk.

5.7.3 In terms of linked trips, the household survey results have been analysed in order to identify those respondents who link main food shopping trips to town centre stores with other activities. In total, 71.1% responded stating that when they undertook their last main food shop, they did not link their trip with any other activity. Of the remaining 26.4% who confirmed they do link their trips with another activity, 5.4% stated they link their trips with non-food shopping, 4.7% with other food shopping and 2.8% state they link their trips with travelling to and from work. When asked specifically where they link the trip with, 14.6% confirmed this was with Preston city centre and 5.6% with Chorley town centre.

5.7.4 Respondents were also asked whether they ever visit Preston city centre or Chorley town centre. In total, 67.7% confirmed they visit Preston city centre and 33.3% confirmed they visit Chorley town centre, with a total of 20.0% respondents stating they don't visit either.

5.7.5 For those who visit Preston and Chorley centres, Table 5.18 below sets out the frequency of the visits of residents to both centres. The highest proportion of respondents stated they visit Preston city at least once a month (22.3%) followed by at least once a week (15.7%). For Chorley town centre, the highest proportion of respondents stated they visit at least once a week (25.2%) followed by at least once a fortnight (22.7%), demonstrating the day-to-day



role that Chorley town centre meets in terms of retail, service and leisure needs. In both cases, a very low proportion (0.2%) of respondents stated that they have only visited the centres once before.

Table 5.18: How Often Do You Visit the Centre

	Preston city centre	Chorley town centre
Daily	5.34%	4.28%
At least two times a week	9.17%	15.16%
At least once a week	15.67%	25.15%
At least once a fortnight	14.54%	22.68%
At least once a month	22.30%	19.18%
At least every two months	12.34%	3.13%
At least every 3 months	8.53%	2.48%
At least every 6 months	5.68%	1.29%
Less often than once every 6 months	2.11%	0.82%
Have only visited once	0.22%	0.20%

Notes: See Appendix 7 for full Household Survey Results

- 5.7.6 Table 5.19 below then provides the principal reason residents have for visiting both of Preston and Chorley centres. The principal reason for visiting the centres in both cases is due to the choice and range of shops (40.5% and 27.2% respectively). The second reason cited is due to the centre being close to home (12.2% for Preston and 17.8% for Chorley). In terms of the market, 9.7% respondents in Chorley cited this as a principal reason for visiting the centre but with regard to Preston, just 1.2% of respondents cited this as a reason.
- 5.7.7 Reasons such as the environmental quality of the centre and pleasant atmosphere fall significantly lower down the list.

Table 5.19: Principal Reasons for Visiting a Centre

	Preston city centre	Chorley town centre
Choice and range of shops	40.52%	27.23%
Close to home	12.24%	17.75%
Choice of services (hairdressers, banks etc)	3.90%	8.09%
Choice of leisure facilities (restaurants, pubs etc)	4.66%	5.49%
Close to work	5.07%	3.88%
Good market	1.19%	9.67%
Good place for window shopping / browsing	2.10%	2.93%
Convenient for meeting / visiting family / friends	2.12%	2.07%
Compact layout / shops close together	1.70%	2.23%
Environmental quality of centre	1.64%	2.19%
Good layout	1.43%	1.20%
Pleasant atmosphere / people	1.40%	0.99%
Familiarity / know my way around	1.24%	0.83%

Notes: Responses over 1% for Preston city centre
See Appendix 7 for full Household Survey Results

5.7.8 Table 5.20 below then sets out the principal measures suggested by residents to encourage additional visits to the centres.

Table 5.20: Principal Measures to Encourage Visits to Centres

	Preston city centre	Chorley town centre
Increased choice and range of shops	10.40%	21.45%
Improved quality of shops	7.06%	20.89%
Improved non-food shops within the town centre	6.34%	15.06%
Cheaper parking	8.83%	4.20%
More parking	7.98%	4.73%
Reduce traffic congestion	5.18%	0.06%
Increased public transport	3.20%	1.80%
Less vacant shops	2.65%	1.05%
Address the homeless issue	3.01%	0.14%
More / better car parking	1.68%	2.18%
Better environment	2.14%	0.99%
Improved street cleaning	1.90%	0.86%
Improve the new market	1.73%	0.24%
Improved roads	1.55%	0.29%
More independent shops	1.18%	0.76%
Improved pavements	1.43%	0.00%

- 5.7.9 The principal measure in relation to both centres is to increase the choice and range of shops (10.4% for Preston and 21.5% for Chorley), followed by an improvement to the quality of shops (7.1% for Preston and 20.9% for Chorley). A further 6.3% of respondents for Preston and 15.1% of respondents for Chorley states that an improved non-food offer in both centres would encourage additional visits, and 8.8% for Preston and 4.2% for Chorley stated that cheaper parking would encourage additional visits.
- 5.7.10 Respondents were asked whether they undertake shopping via electronic means i.e. home, mobile or TV shopping. The majority of respondents (66.8%) stated that they shop via home internet, 30.6% shop via portable internet devices (mobile phone, tablets etc) and 3.2% shop via the TV. A total of 26.3% of the respondents stated that they did not make use of home internet shopping.
- 5.7.11 When asked which goods their household purchases via electronic shopping, the highest positive response was for clothes (45.8%), followed by books (35.8%) and CDs, DVDs and music (26.9%). Overall, 9.0% of respondents said that they shop via internet for food.

6.0 Population and Expenditure

6.1 Introduction

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

6.2 Study Area Population

6.2.1 The population within each Study Area zone at the base year of 2018 and at each of the subsequent forecast years was sourced from Experian Micromarketer G3 2017 data (which was issued in December 2018). Experian data provides 2017 based population estimates that accord with the findings of the 2011 Census release and population projections from 2017. Experian's methodology is based on a 'demographic component model' that takes into consideration current age and gender estimates and the Government's population projections. Future population projections reflect assumed birth and death rates, and net migration.

6.2.2 Table 6.1 below sets out Experian's population projections for each zone in the Study Area for the 2018 base year and reporting years 2023, 2028, 2033 and 2036.

Table 6.1: Study Area Population by Survey Zone (2018 to 2036)

Zone	2018 (Persons)	2023 (Persons)	2028 (Persons)	2033 (Persons)	2036 (Persons)
1	24,044	24,166	24,279	24,269	24,221
2	43,338	43,343	43,573	43,684	43,744
3	64,968	65,317	66,081	66,790	67,136
4	11,204	11,258	11,410	11,623	11,702
5	18,616	18,798	19,025	19,222	19,263
6	22,481	22,640	22,694	22,775	22,816
7	41,994	42,704	43,265	43,634	43,873
8	44,614	45,270	45,709	46,035	46,245
9	32,144	32,436	32,702	32,894	32,885
10	38,512	40,230	41,618	42,804	43,428
11	28,680	30,172	31,385	32,267	32,725
12	18,425	19,290	20,034	20,588	20,871
13	22,650	23,470	24,080	24,498	24,684
14	27,850	28,742	29,556	30,202	30,575
15	31,814	32,425	32,970	33,343	33,472
16	21,431	21,596	21,615	21,585	21,563
Total Study Area	492,765	501,857	509,996	516,213	519,203

Source: Experian Micromarketer G3 2017 Data



6.2.3 The total Study Area population is expected to increase from 492,765 in 2018 to 519,203 in 2036, an increase in 26,438 or 5.4%. The population in Chorley Borough is set out below. The Table demonstrates that the population in Chorley Borough alone is expected to increase by 15,155 persons between 2018 and 2036, equating to an increase in 12.8%, which is substantially higher than the expected population increase across the Study Area as a whole as set out above.

Table 6.2: Study Area Population by Survey Zone (2018 to 2036)

	2018	2023	2028	2033	2036
Chorley Borough	118,555	123,956	128,244	131,512	133,199

Source: Experian Micromarketer G3 2018 Data

6.3 Retail Expenditure

Growth in Spending on Comparison and Convenience Goods

- 6.3.1 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.
- 6.3.2 The base year for the Experian expenditure data is 2017 (the latest available). Per capita annual expenditure growth forecasts are sourced from Experian’s Retail Planner Briefing Note 16 (published in December 2018). Figure 6 of Appendix 4 of the Retail Planner Briefing Note identifies the annual growth forecasts for convenience and comparison goods which inform our assessment and are reproduced in Table 6.2 below.
- 6.3.3 Experian expects the squeeze on household incomes to continue through 2018 and 2019 for comparison goods spending but in the medium term (2021 onwards), retail sales volumes are expected to return to a stronger footing as the Brexit-related uncertainty unwinds and economic conditions improve.
- 6.3.4 For convenience goods, Experian forecasts either negative or static per capita expenditure growth between 2020 and 2036 (in the range -0.2% to 0.1%). The forecast position therefore suggests that sales will generally remain relatively static over the longer term.



Table 6.3: Annual Per Capita Expenditure Growth Forecasts

Year	Convenience (%)	Comparison (%)
2017	0.6	3.0
2018	0.7	1.0
2019	0.1	1.5
2020	-0.1	1.8
2021	0.1	2.4
2022	-0.2	2.6
2023	0.0	2.9
2024	0.0	3.0
2025	0.0	2.9
2026	0.0	3.0
2027	0.0	3.0
2028	0.1	2.9
2029	0.0	3.0
2030	0.0	3.1
2031	0.1	3.2
2032	0.0	3.1
2033	0.1	3.2
2034	-0.1	3.1
2035	0.1	3.2
2036	0.1	3.2

Source: Figure 6 of Appendix 4, Retail Planner Briefing Note 16 (December 2018)

6.3.5 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 term are reflective of any changes to relevant available data.

Growth in Spending on SFT

6.3.6 Experian Retail Planner Briefing Note 16 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.



- 6.3.7 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.
- 6.3.8 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 4 of its Retail Planner Briefing Note 16) which makes an allowance for internet sales which are sourced from stores.
- 6.3.9 The proportion of expenditure committed through special forms of trading cited below at Table 6.4 is ‘stripped out’ of the identified expenditure as it is not available to stores within the Study Area.

Table 6.4: Special Forms of Trading Forecasts

Year	Convenience (%)	Comparison (%)
2018	3.7	17.0
2023	4.8	20.1
2028	5.3	21.3
2033	5.7	21.6
2036	5.8	21.7

Source: Figure 5 of Appendix 4, Experian Retail Planner Briefing Note 16 (December 2018)

- 6.3.10 Based on the above growth rates and special forms of trading allowances, it is possible to produce expenditure estimates for each survey zone at 2018, 2023, 2028, 2033 and 2036. In doing so, our assessment takes into account both per capita retail expenditure growth and population change.

6.4 Convenience Goods Expenditure

- 6.4.1 Taking into consideration the above changes in population and per capita expenditure, it is estimated that, at 2018, the resident population of the Study Area generates £1,096.1m of convenience goods expenditure²³.
- 6.4.2 The Table 6.5 below indicates that available convenience goods expenditure is then forecast to increase to £1115.5m by 2023 and then increase to £1134.9m by 2028 and to £1151.1m by 2033. By 2036, the total available convenience expenditure is estimated to be £1,160.1m. The overall increase of £64.0m between 2018 and 2036 represents an increase of 5.8%.

²³ Expressed in 2016 prices, as is every subsequent monetary value

Table 6.5: Total Available Study Area Convenience Goods Expenditure

2018 (£m)	2023 (£m)	2028 (£m)	2033 (£m)	2036 (£m)
1096.1	1115.5	1134.9	1151.1	1160.1

Source: Table 2a of Appendix 8

Table 6.6: Growth in Available Study Area Convenience Goods Expenditure

Growth 2018-2023	Growth 2018-2028	Growth 2018-2033	Growth 2018-2036
£19.4m	£38.8m	£55.0m	£64.0m
1.8%	3.5%	5.0%	5.8%

Source: Table 2a of Appendix 8

6.4.3 The proportion of convenience goods expenditure that is spent during 'main food' shopping trips and through 'top-up' shopping trips was estimated with reference to respondents' answers to Question 18 and Question 25A of the household survey, which ask respondents to estimate their weekly main food shopping expenditure and weekly top-up shopping expenditure respectively. We analysed the responses to these questions to derive an estimate of the split between main and top-up expenditure on a zonal basis as shown in Table 6.7 below.

Table 6.7: Assumed Split of Convenience Goods Expenditure Between Main and Top-Up Shopping

Zone	Main Food (%)	Top-Up (%)
1	81%	19%
2	82%	18%
3	81%	19%
4	81%	19%
5	84%	16%
6	79%	21%
7	83%	17%
8	82%	18%
9	79%	21%
10	80%	20%
11	83%	17%
12	82%	18%
13	85%	15%
14	80%	20%
15	79%	21%
16	81%	19%



- 6.4.4 By applying these estimates to the total convenience goods expenditure for each zone at 2018, we estimate (by adding together our estimates of the monetary split between main and top up shopping expenditure within each zone) that across the Study Area as a whole, £891.4m of convenience goods expenditure will be spent during main food shopping trips and £204.7m during top up shopping trips. In terms of Zones 9 to 13 (which principally cover Chorley Borough’s administrative area), the total available expenditure at 2018 equates to £316.5m, rising to £349.2m by 2036.
- 6.4.5 The proportion of the study area residents’ convenience goods expenditure spent during main food shopping trips therefore equates to 81.3% of their overall convenience shopping expenditure. The remaining 18.7% of expenditure (which will typically be spent on regular purchases such as milk, bread and so on) is therefore attributed to the respondents’ top-up convenience shopping destination.

6.5 Comparison Goods Expenditure

- 6.5.1 For comparison goods, Table 6.8 sets out our estimation that the resident population of the Study Area will generate £1,555.4m of comparison goods expenditure at 2018. Available comparison goods expenditure is then forecast to increase to £1,770.5m at 2023, £2,082.3m at 2028, £2,472.5m at 2033 and £2,801.8m at 2036. As identified by Table 6.9, this represents an increase of £1,246.4m, or 80.1%, between 2018 and 2036.
- 6.5.2 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 6.8: Total Available Study Area Comparison Goods Expenditure

2018 (£m)	2023 (£m)	2028 (£m)	2033 (£m)	2036 (£m)
1,555.4	1,770.5	2,082.3	2,472.5	2,801.8

Source: Table 2a of Appendix 8



Table 6.6: Growth in Available Study Area Comparison Goods Expenditure

Growth 2018-2023	Growth 2018-2028	Growth 2018-2033	Growth 2018-2036
£215.1m	£527.0m	£917.2m	£1,246.4m
13.8%	33.9%	59.0%	80.1%

Source: Table 2a of Appendix 8

6.5.3 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', 'Small Household Goods', 'Toys, Games, Bicycles and Recreational Goods' and 'Health and Beauty/Chemist 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.

6.5.4 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.

7.0 Retail Capacity in Chorley Borough

7.1 Introduction

- 7.1.1 In this section we set out our assessment of the quantitative capacity for additional convenience and comparison goods floorspace in Chorley Borough over the study period from 2018 to 2036, and at five-year reporting periods in between (i.e. at 2018, 2023, 2028, 2033 and 2036).
- 7.1.2 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 the town centre as this could prejudice the implementation of the town centre schemes and the development of more central sites that may be currently available or that could become available over time.
- 7.1.3 Appendix 8 provides a complete series of quantitative capacity tables that provide further detail in terms of the step-by-step application of our quantitative assessment methodology.
- 7.1.4 Following our quantitative capacity assessment, we assess the qualitative need for additional convenience and comparison retail floorspace in the borough. We do this by considering whether there are any deficiencies or gaps in terms of the location and quality of the existing provision, along with factors including consumer choice and competition, and over-trading at existing stores.

7.2 Capacity Formula

- 7.2.1 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).
- 7.2.2 **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
- Special Forms of Trading (e.g. the internet, catalogue shopping and so on).

7.2.3 **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 that lists the sales densities for all major multiple retailers.

7.2.4 **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.

7.2.5 Although a surplus figure is presented in monetary terms, it is possible to convert this figure to provide an indication of the quantity of floorspace that 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.

7.3 Future Capacity for Convenience Goods Floorspace

7.3.1 In order to appraise the need for additional convenience goods retail floorspace, we first consider the performance of the current provision. Next, we assess how the performance of stores will be affected by future growth in expenditure. We then set out the anticipated increases in expenditure that will be available to the borough's convenience goods retail facilities.

7.3.2 Following these exercises, we then take account of any new convenience goods floorspace that has been implemented subsequent to the date of the household survey and consider the effect that extant planning commitments will have in addressing any identified convenience goods shopping needs.

Trading Performance of Existing Convenience Provision

7.3.3 We assess the individual performance of each of the main convenience goods facilities in Chorley Borough by comparing the survey-derived turnover of each food retail destination to

its 'benchmark' turnover. The 'benchmark' turnover indicates the level of turnover that the store would generally be expected to attract, based on company average trading levels. A judgement can then be made on the trading performance of existing facilities by comparing the survey-derived turnover with the expected 'benchmark' turnover of existing provision.

- 7.3.4 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 and average turnover per square metre (from nationally published trading information from Mintel and Verdict), it can be more difficult to quantify the extent and performance of local convenience provision as there is no single comprehensive database to rely upon. Where we have been unable to verify the exact quantity or performance of floorspace provided by existing smaller-scale convenience goods stores (such as '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). Accordingly, in assessing the quantitative capacity for additional convenience goods floorspace in Chorley Borough, we make an adjustment for under or over-trading at existing convenience retail stores in Chorley Borough in the 2018 base year²⁴.
- 7.3.5 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 operator²⁵ has been applied to the estimated net floorspace of each foodstore. This provides an indication of the likely sales area dedicated to the sale of convenience goods at each store.
- 7.3.6 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 overstate the role and performance of larger national multiple stores whilst understating that of smaller stores and independent retailers. To minimise the potential for such bias, our household survey asked shoppers where they last undertook particular types of shopping rather than where they

²⁴ Excluding any under or over-trading at smaller-scale stores for which we were unable to verify the performance of the floorspace. This typically includes stores ranging between 0 and 500 sq.m but is specified in detail at Appendix 8

²⁵ Generally derived from Verdict's 2017 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 8.

most frequently shop, which is more likely to record infrequent purchases that are typically made at smaller centres and stores.

7.3.7 A summary of our benchmark assessment showing the current overall trading position of convenience goods floorspace in Chorley Borough including inflow compared against the expected 'benchmark' turnover is provided in Table 7.1 below.

Table 7.1: Overall Trading Performance of Foodstores in Chorley Borough at 2018

	Benchmark Turnover	Survey Derived Turnover	Over- or Under-trading
	(A)	(B)	(B-A)
	£m	£m	£m
Total Chorley Borough	268.2	237.1	-31.1

Source: Table 6 at Appendix 8

7.3.8 Our assessment identifies that taking all convenience goods retail facilities in Chorley Borough together, the expected turnover of provision is £268.2m per annum at 2018, which is £31.1m higher than the £237.1m turnover identified to be drawn from the Study Area residents.

7.3.9 Of particular note in terms of the performance of certain stores within the Borough, we can see that the Aldi on Harpers Lane is identified as overtrading by approximately £13.1m at 2018, and the Aldi in Buckshaw is also overtrading by approximately £14.7m at 2018. However, the survey identifies that the Asda on Bolton Road is undertrading by approximately -£24.6m when compared to benchmark average and the Tesco in Buckshaw by approximately -£9.7m at 2018. In addition, the survey also identifies that the Booths in Chorley town centre is undertrading by approximately -£7.7m.

Surplus Expenditure Available for Additional Convenience Goods Floorspace

7.3.10 Table 7.2 below sets out the surplus convenience expenditure available to support additional convenience goods retail floorspace in Chorley Borough. The surplus expenditure assessment takes account of the current convenience goods trading position compared against the 'benchmark' (or anticipated) turnover of existing convenience goods floorspace and identifies the position prior to taking account of planning commitments for new convenience goods floorspace.

Table 7.2: Surplus Expenditure Available for Additional Convenience Goods Floorspace in Chorley Borough

Year	Benchmark Turnover of Existing Stores (A) £m	Available Expenditure Expenditure Drawn from Study Area (B) £m	Surplus Expenditure (B-A) £m
2018	268.2	237.1	-31.1
2023	272.2	241.3	-30.9
2028	273.9	245.5	-28.4
2033	273.9	249.0	-24.8
2036	273.9	251.0	-22.9

Source: Table 8a of Appendix 8

- 7.3.11 Accordingly, Table 7.2 sets out the benchmark turnover of existing convenience retail facilities in Chorley Borough in the 2018 base year and projects this forward to 2036 assuming that the benchmark turnover of existing floorspace will increase through improvements in floorspace efficiency at the rates set out in Experian Retail Planner Briefing Note 16.
- 7.3.12 The £237.1m of convenience goods expenditure generated by residents of the Study Area and spent in destinations within Chorley Borough at 2018 equates to a market share of 21.6% (the proportion of the Study Area residents' expenditure on convenience goods which is spent in Chorley Borough). Given the geography of the borough and its strong retention of convenience goods expenditure across Zones 10, 11 and 12 in particular, our assessment assumes that the current market share of facilities in Chorley Borough is maintained over the study period to 2036.
- 7.3.13 After increases in population are considered against the forecast changes in floorspace productivity²⁶ and expenditure per capita, we estimate that the total available convenience goods expenditure in Chorley Borough drawn from residents of the study area will be £241.3m at 2023, increasing to £245.0m at 2028, £249.0m at 2033 and £251.0m at 2036.
- 7.3.14 Table 7.2 shows that a convenience goods expenditure deficit is identified at 2018 of -£31.1m and a deficit remains across the study period to 2036 when it decreases slightly to -£22.9m.

²⁶ Account has been made for the turnover efficiency of existing convenience goods floorspace to change in accordance with the projections set out in Table 4a of Experian Retail Planner Briefing Note 16 (these being 1.5% at 2018, 0.6% between 2023 and 2028 and then 0.0% between 2028 and 2036). Operators have historically been able to make their existing floorspace more productive over time. However, these negative turnover efficiency growth rates reflect current forecasts for convenience goods floorspace productivity to fall or remain static over the study period.

Commitments for New Convenience Goods Floorspace

- 7.3.15 The next stage is to make an allowance for planning commitments for new convenience goods floorspace, comprising floorspace implemented subsequent to the household survey in July 2018 and extant planning permissions. There are a number of such commitments that are expected to draw on the convenience goods expenditure available in Chorley Borough as scheduled in Table 7 at Appendix 8.
- 7.3.16 Table 7.3 below provides a summary of the five convenience commitments identified within and surrounding Chorley which will all have a draw of trade from residents located within the Borough. For each commitment, we have applied an assumed proportion of trade which will be drawn specifically from residents located within the Chorley administrative area. These assumptions are based on figures used in application documents and WYG's professional judgement based on the type and location of the proposal.
- 7.3.17 In total, we estimate that the five commitments will have a total convenience turnover of £38.7m, which includes the commitment to deliver retail floorspace on the Cuerden Strategic site located within South Ribble's administrative area. In calculating the proportion of trade which will be drawn from Chorley's residents to the Cuerden scheme, we have used the retail impact assessment submitted and approved by the Council when granting the scheme. WYG has assumed that 16% of the convenience turnover of the Cuerden scheme will be drawn from residents in the Study Area, based on the applicant's trade draw figures and Chorley's retail planning consultant's advice.

Table 7.3: Allowance for Planning Commitments for New Convenience Goods Floorspace

Scheme	Application Reference	Address	Convenience Turnover Drawn from Expenditure in Chorley Borough £m
Erection of a convenience retail store, a building comprising 40no. Retirement apartments, car parking and associated infrastructure following demolition of all existing buildings and structures	17/00464/FULMAJ	Former Pines Hotel, Preston Road, Clayton-Le-Woods	14.44
Erection of 14 dwellings, a building comprising flexible use commercial units and associated car park following demolition of Calder and Rydal Houses	17/00438/FULMAJ	Calder House & Rydal House Highfield Road North Chorley PR7 1PH	2.86
Section 73 to Vary Conditions 1, 3, 4, 6, 12, 13 and 19 attached to approval 10/00334/FULMAJ	10/01052/REMMAJ	Buckshaw Village (Commercial Area)	1.07
Full application for the demolition of the Civic Offices, shopmobility units, public toilet 'kiosk' and electricity sub-station and the erection of a two storey retail (with a maximum convenience floor space of 1,394m ²), restaurant and leisure unit on the Flat Iron car park along with the erection of a two storey restaurant/ retail (comparison goods only)/ office unit with replacement sub-station on the southern portion of the site.	15/00375/FULMAJ	Market Walk Extension, Union Street, Chorley	15.35
Hybrid planning application comprising of Full and Outline development - Environmental Impact Assessment (EIA) development Part 1 FULL - Retail floorspace (Use Classes A1 & A3) and associated car parking, site access, highway works, drainage and strategic landscaping; Part 2 OUT - Employment floorspace (Classes B1, B2 & B8), hotel (Class C1), health and fitness and leisure (Class D2), creche/nursery (Class D1), retail (Classes A1, A2, A3, A4 & A5), car showrooms (Use Class Sui Generis), residential (Classes C2/C3) and provision of associated car parking, access, public open space, landscaping and drainage	07/2017/0211/ORM	Cuerden Strategic Site East of Stanifield Lane, North of Clayton Farm, West of Wigan Road Lostock Lane, Lostock Hall, Preston, Lancashire	4.98
			38.69

Source: Table 7 at Appendix 8

Residual Quantitative Need for Additional Convenience Goods Floorspace

7.3.18 Table 7.4 below sets out the residual convenience expenditure capacity in Chorley Borough taking into account the turnover requirements of the commitments for new convenience retail floorspace. The estimated turnover of the commitments is deducted from the surplus expenditure capacity figures identified in Table 7.2 above.

Table 7.4: Residual Quantitative Need for Additional Convenience Goods Floorspace in Chorley Borough after Implementation of Commitments

Year	Surplus Convenience Goods Expenditure	Turnover of Commitments	Residual Convenience Goods Expenditure (C=A-B)	Floorspace Requirement		
	(A)			(B)	Min	Max
	£m			£m	(C/£13,609 per sq.m) sq.m	(C/£10,997 per sq.m) sq.m
2018	-31.1	38.7	-69.8	-5,100	-6,300	
2023	-30.9	39.3	-70.2	-5,100	-6,300	
2028	-28.4	39.5	-67.9	-4,900	-6,000	
2033	-24.8	39.5	-64.4	-4,600	-5,700	
2036	-22.9	39.5	-62.4	-4,500	-5,600	

Source: Table 8c at Appendix 8

- 7.3.19 The residual expenditure identified when taking account of the turnover of commitments is then converted into floorspace requirements using average sales densities of £13,609 per sq.m and £10,997 per sq.m, dependent on the nature of the convenience operator. The lower sales density is more typical for retailers such as Lidl and Iceland, and the higher sales density is an average of the 'top four' convenience operators (Tesco, Asda, Sainsbury's and Morrisons). Using two sales density figures gives an idea as to how any identified quantitative needs could be met in practice.
- 7.3.20 The expenditure surplus reduces to a residual deficit of –£69.8m at 2018 once the turnover requirements of planning commitments are taken into account. Even after increases in population are considered against the changes in expenditure and floorspace productivity, the residual convenience expenditure capacity will remain in deficit over the entire study period to 2036, albeit decreasing to –£62.4m at 2036.
- 7.3.21 Accordingly, such is the quantity of convenience goods floorspace already implemented and committed in Chorley Borough that there is no quantitative requirement for any additional convenience goods floorspace within the borough over the entire study period to 2036. However, given the inherent uncertainties in predicting the economy's performance over

time, we recommend that the longer term (beyond ten years) estimates are viewed with some caution. We comment on the qualitative requirement below.

7.4 Future Capacity for Comparison Goods Floorspace

- 7.4.1 Turning to comparison goods capacity, it is important to note that our methodology deviates from that 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.
- 7.4.2 As a consequence, we do not consider it appropriate to calculate a benchmark trading performance for comparison goods floorspace based on an assumed sales density. Instead, we adopt the approach that comparison goods floorspace is trading 'at equilibrium' at 2018 (i.e. our survey derived turnover estimate effectively acts as benchmark). Accordingly, in assessing the quantitative capacity for additional comparison goods floorspace in Chorley Borough, we make no adjustments for under or over-trading at existing comparison retail stores in Chorley Borough in the 2018 base year.
- 7.4.3 Therefore, in assessing the future capacity for new comparison goods floorspace in Chorley Borough, we first identify the total comparison goods expenditure generated by the residents of the study area and spent in destinations within Chorley Borough assuming that the future performance of Chorley's facilities will be commensurate with its current market share.
- 7.4.4 We then identify the comparison goods turnover of existing stores assuming that the turnover of existing comparison goods floorspace at 2018 equals the total available expenditure within Chorley Borough in the 2018 base year. We allow for the turnover of existing stores to increase over the study period to allow for year on year increases in the productivity of existing floorspace.
- 7.4.5 Following this exercise, we then take account of any new comparison goods floorspace that has been implemented subsequent to the household survey and consider the effect that extant planning commitments for additional comparison retail floorspace will have in addressing any identified comparison goods shopping needs.

Surplus Expenditure Available for Additional Comparison Goods Floorspace

- 7.4.6 The £200.9m of comparison goods expenditure generated by residents of the Study Area and spent in destinations within Chorley Borough at 2018 equates to a market share of 12.9%. Again, it is assumed that the future performance of Chorley Borough's facilities will be commensurate with its current market share. Our assessment therefore 'rolls forward' this market share to examine the likely level of comparison goods floorspace required to maintain the role and function of Chorley's retail facilities.
- 7.4.7 Assuming that the current market share is maintained over the study period, we estimate that the total available comparison goods expenditure in Chorley Borough will increase from £200.9m at 2018 to £309.3m at 2036.
- 7.4.8 Assuming that the existing comparison retail facilities in Chorley Borough are trading 'at equilibrium', we estimate that existing stores attract a total of £200.9m of comparison goods expenditure at 2018. We therefore assume that there is no surplus expenditure and no quantitative need for any additional floorspace across the borough at the base year. We then estimate the future turnover requirements of existing stores taking account of the forecast increases in the sales efficiency of existing comparison goods floorspace as set out in Experian Retail Planner Briefing Note 16.
- 7.4.9 After accounting for forecast increases in population and comparison goods expenditure, and allowing for year on year increases in the productivity of existing floorspace, we estimate that there will be expenditure surplus available to support additional comparison goods floorspace within Chorley Borough of £1.8m at 2023, increasing to a more substantial £11.1m at 2028 and £30.4m at 2033. We estimate that by 2036, the surplus expenditure would increase to £52.5m. The surplus expenditure available to support additional comparison goods floorspace is summarised in Table 7.5.

Table 7.5: Surplus Expenditure Available for Additional Comparison Goods Floorspace in Chorley Borough

Year	Expenditure Drawn from Study Area (A) £m	Turnover of Existing Stores (D) £m	Surplus Expenditure (C-D) £m
2018	200.9	200.9	0.0
2023	228.7	226.8	1.8
2028	268.9	257.9	11.1
2033	319.3	288.9	30.4
2036	361.8	309.3	52.5

Source: Table 30a of Appendix 8

Commitments for New Comparison Goods Floorspace

- 7.4.10 The next stage is to make an allowance for planning commitments for new comparison goods floorspace, comprising floorspace implemented subsequent to the household survey in July 2018 and extant planning permissions.
- 7.4.11 There are a number of such commitments that are expected to draw on the comparison goods expenditure available in Chorley as scheduled²⁷ in Table 29 at Appendix 8. The most notable of which is the floorspace proposed associated with the Cuerden Strategic Site (located within South Ribble's administrative area), the proposed development at Botany Bay and the new Market Walk scheme.
- 7.4.12 As summarised in Table 7.6 below, we estimate that retail planning commitments that are expected to draw on the available comparison goods expenditure in Chorley together provide an estimated turnover of £67.7m if operational in the 2018 base year.

²⁷ Only commitments providing a total gross retail floorspace of greater than 200 sq.m have been included in our assessment as it is considered that proposals of a lesser scale will not have a tangible effect on shopping patterns.

Table 7.6: Allowance for Planning Commitments for New Comparison Goods Floorspace

Scheme	Application Reference	Address	Convenience Turnover Drawn from Expenditure in Chorley Borough £m
Erection of a convenience retail store, a building comprising 40no. Retirement apartments, car parking and associated infrastructure following demolition of all existing buildings and structures	17/00464/FULMAJ	Former Pines Hotel, Preston Road, Clayton-Le-Woods	1.7
Erection of 14 dwellings, a building comprising flexible use commercial units and associated car park following demolition of Calder and Rydal Houses	17/00438/FULMAJ	Calder House & Rydal House Highfield Road North Chorley PR7 1PH	1.6
Full application for the demolition of the Civic Offices, shopmobility units, public toilet 'kiosk' and electricity sub-station and the erection of a two storey retail (with a maximum convenience floor space of 1,394m ²), restaurant and leisure unit on the Flat Iron car park along with the erection of a two storey restaurant/ retail (comparison goods only)/ office unit with replacement sub-station on the southern portion of the site. The creation of a temporary car park on the Civic Offices site alongside various public realm improvement works, relocation of the existing statue and associated servicing, access, soft landscaping and enhanced pedestrian linkages. Outline application for the erection of a retail unit (Use Class A3-A5) on the existing Civic Offices site all matters reserved save for access	15/00375/FULMAJ	Market Walk Extension Union Street Chorley	9.6
Section 73 to Vary Conditions 1, 3, 4, 6, 12, 13 and 19 attached to approval 10/00334/FULMAJ	10/01052/REMMAJ	Buckshaw Village (Commercial Area)	0.7
Outline planning application for retail floorspace (Use Classes A1, A3, A4 & A5), employment floorspace (Use Class B1), hotel (Use Class C1), creche/nursery (Use Class D1) and provision of associated car parking, highways, landscaping, and infrastructure and any ancillary development thereto.	17/00715/OUTMAJ	Land Between M61 Motorway And Leeds And Liverpool Millennium Way Chorley	26.2
Hybrid planning application comprising of Full and Outline development - Environmental Impact Assessment (EIA) development Part 1 FULL - Retail floorspace (Use Classes A1 & A3) and associated car parking, site access,	07/2017/0211/ORM	Cuerden Strategic Site East of Stanifield Lane, North of Clayton Farm,	27.9



Scheme	Application Reference	Address	Convenience Turnover Drawn from Expenditure in Chorley Borough
highway works, drainage and strategic landscaping; Part 2 OUT - Employment floorspace (Classes B1, B2 & B8), hotel (Class C1), health and fitness and leisure (Class D2), creche/nursery (Class D1), retail (Classes A1, A2, A3, A4 & A5), car showrooms (Use Class Sui Generis), residential (Classes C2/C3) and provision of associated car parking, access, public open space, landscaping and drainage		West of Wigan Road Lostock Lane, Lostock Hall, Preston, Lancashire	
			67.7

Source: Table 29 of Appendix 8

7.4.13 Full details of the assumptions made in estimating the turnover of commitments are provided in the notes which accompany Table 29 of Appendix 8.

Residual Quantitative Need for Additional Comparison Goods Floorspace

7.4.14 Table 7.7 below sets out the residual comparison expenditure capacity in Chorley Borough, taking into account the turnover requirements of the planning commitments for new comparison retail floorspace, and converts this to a floorspace requirement.

7.4.15 A residual comparison goods expenditure deficit of –£67.7m at 2018 is identified once the turnover requirements of planning commitments are taken into account. Extant planning permissions are expected to absorb all of the surplus expenditure capacity in Chorley Borough in the short-term period up to 2036.

Table 7.7: Residual Quantitative Need for Additional Comparison Goods Floorspace in Chorley Borough after Implementation of Commitments

Year	Surplus Comparison Goods Expenditure	Turnover of Commitments	Residual Comparison Goods Expenditure	Floorspace Requirement	
	(A)		(B)	Min	Max
	£m		£m	(C/£5,000 per sq.m)	(C/£3,000 per sq.m)
2018	0.0	67.7	-67.7	-13,500	-22,600
2023	1.8	76.4	-74.6	-13,200	-22,000
2028	11.1	86.9	-75.9	-11,800	-19,700
2033	30.4	97.4	-67.0	-9,300	-15,500
2036	52.5	104.3	-51.7	-6,700	-11,200

Source: Table 30c at Appendix 8

- 7.4.16 Table 7.7 then translates the identified residual expenditure figures into floorspace requirements, using a maximum average sales density of £5,000 per sq.m and a minimum of £3,000 per sq.m. The maximum average sales density is based on the identified need being met through the delivery of high street floorspace and the minimum figure relates to need being met by bulky goods retailers or independent retailers (which both generally achieve lesser sales densities).
- 7.4.17 As discussed, we do not estimate that there will be a comparison goods floorspace requirement throughout the plan period.

7.5 Qualitative Need

- 7.5.1 Paragraphs 31 and 32 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.
- 7.5.2 Deficiencies and gaps in existing retail provision can be considered on a borough wide basis or in terms of the borough’s individual centres. As set out within Section 5 of this report, we consider that the Study Area secures a reasonably good market share of convenience and comparison goods expenditure. We provide gap analysis plans at Appendix 9 which further support our analysis on the qualitative requirements for both convenience and comparison goods floorspace across Chorley’s administrative area.

Convenience Goods Floorspace

- 7.5.3 In assessing the potential qualitative need for additional retail provision, whilst this is a more subjective matter, there are important factors to consider when reviewing the existing

provision within the administrative area. Issues such as 'gaps' in existing provision, ensuring that communities have easy access to retail facilities and that there is a range of operators to provide choice to residents, along with location specific needs such as higher levels of deprivation, all need to be taken account of when assessing the qualitative need.

- 7.5.4 As set out in detail above, we have not identified any quantitative capacity for additional convenience floorspace across the Borough, once committed convenience floorspace has been taken into account.
- 7.5.5 When reviewing the existing convenience provision across the Borough as a whole, there is representation of all of the 'big four' supermarket operators (i.e. Tesco, Asda, Sainsbury's and Morrisons) and discounters (i.e. Aldi and Lidl) either within or just outside of the Borough.
- 7.5.6 Overall, the foodstores within Chorley Borough are undertrading and some stores are identified to be trading substantially below benchmark including the Asda on Bolton Road (by £23.7m), the Booths on new Market Street in Chorley (by £8.8m) both located in Zone 10. When foodstores are undertrading they are attracting less expenditure than would be expected, and consequently there is an oversupply of convenience floorspace meaning that there is a reduced capacity for new floorspace.
- 7.5.7 Looking at the spatial distribution of foodstores in the administrative area, Zones 10, 11 and 12 all appear to be relatively well provided for by convenience operators which offer a 'main food' provision to local residents (see Appendix 9). In Zone 10 in particular, the residents are served by two Asda stores, an Aldi, the Booths in the town centre, a Morrisons and a Tesco Extra. Indeed, given the level of undertrading of a number of these stores, there is no apparent requirement to deliver a large format (i.e. over 2,000 – 2,500 sq.m gross) foodstore within Zone 10.
- 7.5.8 Zone 11 is dominated by the convenience operators within and in proximity to Buckshaw district centre, with the Tesco superstore within the district centre and the Aldi located to the north east on a standalone retail park. The Aldi is overtrading substantially, but this is not unusual for convenience operators of this nature within retail studies given the low level of floorspace provided and the decisions by residents to choose these retailers to meet their main food shops. The residents in and surrounding Eccleston local centre are served principally by the Sainsbury's Local which does not offer a sufficient range of goods to cater for residents' main food shopping requirements. Reviewing the existing shopping patterns, a high proportion of residents from Zone 11 are travelling to Zone 10 (Central Chorley) to

meet their main food shopping needs, with the principal store being the Tesco Extra at Ackhurst Industrial Park, which is located approximately 13 minutes away by car. Providing a mid format foodstore (between 500 and 1,500 sq.m) within Ecclestone would assist to reduce the distance residents have to travel to meet their main food shopping needs.

- 7.5.9 However, given its location and the population of Ecclestone, and the current commercial market, the viability of delivering a foodstore in this location is uncertain and we would suggest that further commercial advice is sought from retail agents. In any event, should an appropriate operator be identified, any development should be directed towards the local centre in the first instance to assist in retaining expenditure within the centre and ensuring that no adverse impact was felt on the centre in accordance with policy.
- 7.5.10 In terms of Zone 13, again as is shown on the gap analysis plan at Appendix 9, the residents are not served by a wide range of convenience operators, and the operators that are present are serving a more localised role and do not meet a main food convenience need. Again, for main food shopping trips, residents of Zone 13 are travelling to destinations in Zone 10, with the principal destinations being the Aldi at Harpers Lane, the Morrisons on Brooke Street and the Tesco Extra at Ackhurst Industrial Estate, or to the Aldi in Horwich, located outside of the study area. We therefore consider there to be a qualitative requirement for an additional convenience facility within Zone 13 and particularly within Adlington to meet the main food deficiency identified. Providing a mid format foodstore (between 500 and 1,500 sq.m) within Adlington would also assist to reduce the distance residents have to travel to meet their main food shopping needs. As is the case for Ecclestone, the viability of delivering a foodstore in this location is uncertain and we would suggest that further commercial advice is sought from retail agents and any development should be directed towards the defined centres in the first instance.
- 7.5.11 We note that the 2015 Local Plan adopted an extended town centre boundary to support the development of a supermarket/appropriate retail uses, with additional Class D1 and D2 Uses at first floor level within Market Street, Adlington. We have recommended that this boundary is again retracted given the lack of progression of a site since the previous local plan, and we do not recommend that a site is allocated specifically to meet this qualitative deficiency. This is due to the lack of any progress in terms of the redevelopment of the site and there being no real benefit to the protection of the centre in retaining the allocation within the defined boundary. Instead, removing the allocation will ensure that the Council regains control over the vitality and viability of the centre, and should an alternative use come forward on the adjacent site, given its edge of centre location, an appropriate scheme will still benefit the

defined centre through the encouragement of linked-trips and increased footfall. In short, removing the site from the boundary provides greater control of the existing centre and uses to the Council, whilst still providing opportunities for development in the future should an appropriate scheme come forward.

- 7.5.12 However, we do recommend that opportunities to accommodate a mid-format foodstore in and around Adlington are explored if there is genuine interest in the market to expand operators' portfolio.

Comparison Goods Floorspace

- 7.5.13 Turning to the qualitative need for comparison goods, we focus primarily on Chorley town centre, which – as the largest centre in the administrative area - is most likely to attract interest from retail operators and developers.
- 7.5.14 The quantitative assessment identifies that in the short, medium and long term there is limited capacity for additional comparison floorspace within Chorley's administrative area.
- 7.5.15 The 2013 Chorley Town Centre Masterplan was produced to guide the future development of Chorley town centre, providing a deliverable framework for investment at key development sites to ensure the vitality and viability of the centre. The Masterplan set out some clear messages about Chorley and how it can best respond to the competitive market. Furthermore, the Masterplan provided a series of principles to help improve the town centre including:
- Reinforcement of the retail offer and support the independent sector;
 - Deliver opportunities for new food and drink, arts and community uses to add 'richness' to the town centre offer; and
 - Support the town centre with great public spaces and attractive streets by investing in the public realm, car parking and the centre itself.
- 7.5.16 Chorley town centre benefits from a number of national multiple comparison retailers but is lacking in what could be classed as a 'anchor' department store style comparison retailer such as Debenhams, Marks and Spencer or John Lewis. However, it is acknowledged that such operators are currently rationalising their portfolio instead of actively expanding, and as such, town centre schemes anchored by these large format department stores which pre-recession were driving developments, such schemes are no longer progressing at their previous rates.

- 7.5.17 Instead, local authorities and private landowners are having to explore alternative town centre development options to regenerate key sites, including meeting residential requirements and a wider emphasis on providing something 'different' to traditional town centres uses. Whilst retail, leisure, service and community uses are still the heart of a centre and invaluable in terms of helping to make a town centre successful, the successful centres across the UK are those which are drawing in visitors and residents for other reasons.
- 7.5.18 The Market Walk scheme will deliver new, modern format floorspace to attract operators. The mixed-use commercial scheme will bring a six screen cinema, M&S Foodhall which will include a click & collect facility for wider M&S products and additional floorspace for other retail and leisure operators. The scheme, whilst not technically delivering a large format anchor comparison retailer, will deliver other operators to draw shoppers and visitors into the centre, and increase the dwell time.
- 7.5.19 As such, we recommend that in the first instance, the delivery of the Market Walk scheme is the key priority, and the site should continue to be allocated as a retail development site within the Local Plan. This scheme then needs time to settle and establish itself within Chorley town centre before any additional sites are brought forward for additional retail (or indeed any other commercial) floorspace. All efforts are required to help with the success of the Market Walk scheme.

8.0 Assessment of Leisure Needs

8.1 Introduction

- 8.1.1 Our approach to the assessment of commercial leisure needs 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 meet the needs of the Borough's population in relation to the bingo, cinema, ten-pin bowling and health and leisure centre sectors.
- 8.1.2 The assessment of current participation rates and proportion of visits to existing commercial leisure destinations is based on the findings from the household survey, which included residents within the adopted Study Area. The capacity figures provided below for each commercial facility is based on the expected population growth in the Study Area only.
- 8.1.3 The results of the NEMS survey offer an indication of locations and facilities where residents of the Study Area satisfy their leisure and cultural needs. As such, the survey enables us to analyse patterns of travel and potential deficiencies (those that are qualitative in nature) in Chorley's provision. However, there is a limited level of reliable data on leisure uses expenditure and therefore, 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 Chorley Borough.
- 8.1.4 For each leisure sector, we consider the current broad patterns of existing use, before then assessing the quantitative need for additional facilities. It is clear that there are types of leisure uses (cinemas, bowling alleys, bingo clubs and so on) which require larger sites to sufficiently accommodate the business models, and as such, by virtue of their size, sites may need to be identified through the development plan process and land allocated accordingly.
- 8.1.5 The leisure market has undergone drastic structural changes over the past few years and the recession substantially altered consumers' spending patterns. However, trends are still indicating that consumers are increasing their expenditure on eating out and cinema trips, along with fitness centre memberships increasing.



8.1.6 Respondents of the household survey were asked which leisure facilities they would like to see more of in their area. Table 8.1 below sets out the top answers (all those with the proportion of answers above 1.0%) across the Study Area as a whole, the most popular answer was for additional cinema uses (7.4%), followed by additional swimming pool facilities (5.5%). 5.1% of responses also stated that they would like to see more children facilities/activities and 3.2% stated they would like better shopping facilities.

Table 8.1a: Leisure Uses Desired in the Study Area

Leisure Use	Proportion of Responses
Cinema	7.4%
Swimming pool	5.5%
More children facilities / activities	5.1%
Better shopping facilities	3.2%
Restaurants / cafes	3.0%
Bowling alley	2.7%
More sports facilities (football pitches, tennis courts)	2.6%
Health & fitness (gym)	1.9%
Leisure centre	1.7%
Theatre	1.6%
Bars / pubs	1.5%
Outdoor play areas / park facilities	1.3%
None	63.9%

Question 46 of Household Survey, Appendix 7

8.1.7 Table 8.1b below then provides a breakdown for the leisure uses desired by residents from Zones 10 to 13. We can see that in each case, the residents' top answer is for a new cinema facility, with the highest proportion of responses from residents in Zone 10 at 36.8%. This is not unexpected given the commitment for a new cinema at Market Walk and the wider desire for such a facility to be realised within the town centre. A new bowling alley facility also scores highly, with 10.5% of Zone 11 residents seeking a new facility.

8.1.8 A total of 8.0% and 7.3% of residents in Zones 11 and 12 respectively seek a new swimming pool and 8.2% of Zone 11 residents would also like to see better shopping facilities.

Table 8.1b: Principal Leisure Uses Desired in Zones 10 to 13

Leisure Use	Proportion of Responses			
	Zone 10	Zone 11	Zone 12	Zone 13
Cinema	36.75%	23.41%	14.70%	15.30%
Bowling alley	7.65%	10.48%	1.34%	7.20%
More children facilities / activities	7.44%	4.98%	0.00%	4.11%
Restaurants / cafes	4.32%	3.62%	3.63%	6.89%
Swimming pool	2.68%	7.99%	7.30%	1.74%
Better shopping facilities	2.40%	8.18%	2.96%	4.72%
Cycle paths / area	1.36%	0.00%	3.92%	0.00%
More sports facilities (football pitches, tennis courts)	1.36%	1.39%	2.73%	4.55%
<i>(None)</i>	<i>43.07%</i>	<i>53.21%</i>	<i>62.61%</i>	<i>59.03%</i>

Question 46 of Household Survey, Appendix 7
 Listed in order of popularity of answer for Zone 10 residents
 Does not include all responses

8.2 Participation Rates

8.2.1 The household survey asked respondents which leisure activities they participate in.

8.2.2 Across the Study Area as a whole, the most popular leisure activity mentioned by respondents was visiting restaurants (which 58.7% of respondents visit), followed by visiting pubs/bars (41.2%), then visiting the cinema (41.1%) and then visiting a theatre/concert hall (28.8%). Just 5.4% of respondents stated that they visit bingo facilities and 4.2% of respondents stated that they visit nightclubs. The popularity of residents participating in visits to restaurants, pubs and the cinema reflect national trends, along with the low participation rates for visiting bingo halls, which as we discuss in more detail below, has reduced considerably in popularity over the past decade.

Table 8.1a: Participation Rates

Leisure Activity	Participation Rate
Restaurant	58.73%
Pub / Bars	41.19%
Cinema	41.07%
Theatre / concert hall	28.82%
Health & fitness	25.08%
Museum / art galleries	21.88%
Leisure centre activities	17.03%
Ten pin bowling	10.12%
Bingo	5.42%
Social club	4.90%
Nightclub	4.23%
<i>(None of these)</i>	<i>17.65%</i>

Question 38 of Household Survey, Appendix 7

- 8.2.3 Looking at participant rates for residents in Zones 10 to 13, we can see that the proportion of residents in Zones 10 and 11 who visit restaurants has increased from the Study Area average to above 75% in both cases.
- 8.2.4 The proportion of residents who visit pubs/bars range from 40.0% in Zone 12, to 63.8% in Zone 10 (which covers Chorley town centre). Furthermore, the proportion of residents who visit the theatre has increased from the average across the Study Area to 43.6% in Zone 10 and 40.2% in Zone 11. These variances are likely to be due to the fact that residents closer to the town centre have better access to the theatre and are therefore more likely to visit such a facility. In terms of cinema participation rates, the lowest rate out of the four zones is from Zone 10 at 40.8%, compared to 53.9% in Zone 11. Again, this is likely due to the absence of a cinema in Zone 10 (Chorley town centre), and the opportunities for residents in Zones 11 and 13 to use the principal routes up to South Ribble and Preston or down to Bolton to visit a cinema in the neighbouring authority areas.

Table 8.1b: Participation Rates

Leisure Activity	Participation Rate			
	Zone 10	Zone 11	Zone 12	Zone 13
Restaurant	78.11%	77.97%	57.24%	69.93%
Pub / Bars	63.83%	54.81%	40.00%	54.56%
Theatre / concert hall	43.61%	40.19%	29.89%	42.86%
Cinema	40.78%	53.87%	51.41%	42.67%
Museum / art galleries	29.93%	29.81%	22.01%	22.01%
Health & fitness	28.30%	27.83%	30.86%	20.91%
Leisure centre activities	21.27%	18.86%	20.87%	29.53%
Ten pin bowling	14.58%	14.81%	9.22%	10.89%
Nightclub	11.25%	7.18%	6.17%	0.00%
Social club	9.31%	12.62%	0.67%	6.12%
Bingo	3.64%	1.82%	1.34%	10.94%
(None of these)	10.21%	9.16%	22.09%	13.24%

Question 38 of Household Survey, Appendix 7

8.3 Bingo

8.3.1 Chorley Borough accommodates one formal bingo hall, the Gala Bingo on Market Street in Chorley, which attracts 10.8% of all bingo trips in the Study Area. The Club 3000 bingo hall on New Hall Lane in Preston attracts 45.7% of all trips.

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

Zone	Address	Total
3	Club 3000, New Hall Lane, Preston	45.70%
10	Gala Bingo, Market Street, Chorley	10.81%
OSA	Gala Bingo, Ainsworth Street, Blackburn	6.33%
9	Croston Sports Club, Old Emmanuel School, Westhead Road, Croston	5.38%
1	Gala Bingo, Market Street, Preston	4.31%

Source: Question 52 of Household Survey, Appendix 7

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

8.3.2 In terms of residents in Zones 9 to 13, the principal destination for residents in Zone 9 is the Croston Sports Club and for residents in Zone 10, 11, 12 and 13 it is the Gala Bingo in Chorley town centre.

- 8.3.3 Chorley Borough has a total estimated population of 118,555 at 2018, increasing to 133,199 at 2036. Mintel reports²⁸ that there were 353 bingo halls in the UK at March 2017, which applying the Office for National Statistics' estimated population of the UK of 66.2 million (for June 2017)²⁹, suggests that each hall is supported by a catchment of 187,535 persons or thereabouts. Accordingly, as we set out below at Table 8.3, we estimate that the population of Chorley Borough could support 0.7 bingo clubs across the reporting period to 2036. Across the Study Area, the total population could support 2.6 clubs at 2018, increasing to 2.8 clubs by 2036.
- 8.3.4 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. 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. As a consequence, Mintel³⁰ anticipates that there will be very modest year on year market growth of around 1.5% in the short term, with consumer expenditure forecast to increase from £732m at 2016 to £794m at 2021. The 2019 forecast has increased from £728m as reported by Mintel in 2015, to £767m which suggests that growth has occurred at a slightly faster rate than previously anticipated which further supports the indications that the industry has begun to stabilise.
- 8.3.5 Nevertheless, as a consequence of the generally stagnant market, new bingo hall openings are few and far between. Following the acquisition of Gala Bingo's physical clubs by Caldeonia Investments in December 2015, the clubs were rebranded as Buzz Bingo, claiming space on local high streets. Their overall aim is to attract bingo attendees of all ages and seek to reach out to the wider market and increase the overall attendance rates.
- 8.3.6 However, there is a lack of commercial desire to open new bingo halls and from a qualitative point of view, the offer within Chorley is sufficient to meet the participation rates identified in the household survey alone. If a new facility were to come forward, it would be important to offer a qualitatively different format to that which is already provided by Gala Bingo in a suitable and sustainable location.

²⁸ 'Casinos and Bingo', Mintel, March 2017

²⁹ 'Population Estimates for UK, England and Wales, Scotland and Northern Ireland: Mid-2015', Office for National Statistics, June 2016

³⁰ 'Casinos and Bingo', Mintel, March 2017

8.3.7 In any event, should any proposals for such development be forthcoming, we recommend that they are judged on their own merit in accordance with relevant town centre planning policy at the time of the application’s submission.

Table 8.3: Bingo Hall Requirement in Study Area and Chorley

Year	Study Area Population	Typical Population Required to Support Hall	Potential Number of Clubs Supported by Study Area	Chorley Population	Potential Number of Clubs Supported in Chorley
2018	492,765	187,535	2.6	118,555	0.6
2023	501,857	187,535	2.7	123,956	0.7
2028	509,996	187,535	2.7	128,244	0.7
2033	516,213	187,535	2.8	131,512	0.7
2036	519,203	187,535	2.8	133,199	0.7

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

8.4 Cinema

8.4.1 As set out below at Table 8.4, the results of the household survey indicate that the Vue Cinema at the Capitol Centre attracts the highest proportion of cinema trips at 29.8%, followed by the Odeon Cinema at Riversway in Preston which attracts 26.1% of all trips.

8.4.2 In terms of residents in Zones 9 to 13, the principal destination for residents in Zone 9 is the Vue Cinema at Southport (46.8%) and for residents in Zones 10 to 13, the principal destination for cinema trips is the Vue Cinema at Middlebrook Retail and Leisure Park (60.0%, 69.6%, 62.0% and 93.0% respectively).

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

Zone	Address	Total
7	Vue Cinema, The Capitol Centre, Walton-le-Dale	29.83%
2	Odeon Cinema, Port Way, Riversway, Preston	26.05%
OSA	Vue Cinema, Middlebrook Retail & Leisure Park, The Link Way, Horwich	18.41%
5	The Palace Cinema, Market Place, Longridge	4.44%
OSA	Vue Cinema, Ocean Plaza, Marine Drive, Southport	4.35%

Source: Question 43 of Household Survey, Appendix 7

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

Includes total responses over 1.0%

- 8.4.3 The cinema sector has generally struggled over the last eight years with falling admissions. Total admissions of 158 million in 2014 represented a decline of 8% from the level recorded in 2011³¹. The market was expected to return to growth and admissions for 2015 were estimated to be 173 million, with Mintel³² forecasting an increase in admissions to 175 million in 2020. This forecast is maintained in the most recent Mintel³³ report which goes on to forecast a further increase of admissions to 178 million in 2022.
- 8.4.4 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 moderate increase in the total number of UK cinema sites, which increased from 743 at the close of 2014 to 771 at the close of 2015. Growth continued to occur in 2016, Mintel reporting that the number of sites in the UK increased again by the end of the year to 788.
- 8.4.5 Once again, we estimate that the Study Area has a total estimated population of 492,765 at 2018, increasing to 519,203 by 2036. Mintel 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.
- 8.4.6 Based on the above, Table 8.5a below calculates that the population in the study area could support 31.0 screens at 2018, rising to 32.5 screens by 2036. Table 8.5b then provides a calculation as to the level of screens which could be supported by the population in the Borough alone. Based on the calculations above, the level of screens which could be supported by the population in the Borough only is 7.5 at 2018, increasing to 8.4 by 2036.
- 8.4.7 The new Market Walk retail and leisure scheme, includes the provision of a new cinema with six screens. A new cinema within the town centre will attract residents into the centre, whilst seeking to encourage increased dwell time in visiting the surrounding restaurants. Given that Chorley does not currently have a cinema, the new development at Market Walk will meet the current requirement within the Borough. The allocation for Market Walk should therefore remain in the new local plan. Whilst the provision of six new cinema screens would fall below the identified need in Table 8.5b below for Chorley's administrative area, we do not consider that the Council should plan for additional cinema provision within the study period. WYG considers that the proposed cinema within Chorley town centre should be given time to 'bed in' and establish itself in the first instance, particularly given the wider benefits associated

³¹ 'Cinemas', Mintel, November 2014

³² 'Cinemas', Mintel, November 2015

³³ 'Cinemas', Mintel, November 2017

with the scheme in bringing residents back into Chorley town centre who would otherwise have been travelling outside of the Borough to meet their cinema trip requirements.

8.4.8 Indeed, any scheme in an alternative edge or out of centre location including floorspace which could accommodate similar types of uses proposed at Market Walk and which could therefore impact on the progression or success of the development should be restricted in accordance with national planning policy. The mixed-use scheme would bring substantial benefits to the town centre and should continue to be fully supported by local policy moving forward.

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
2018	492,765	2.7	1,330,466	42,927	31.0
2023	501,857	2.7	1,346,846	42,927	31.4
2028	509,996	2.7	1,368,784	42,927	31.9
2033	516,213	2.7	1,385,702	42,927	32.3
2036	519,203	2.7	1,393,610	42,927	32.5

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 Chorley

Year	Chorley Population	Number of Cinema Visits Per Person	Attendance	Number of Admissions Required to Support Screen	Screens Supported
2018	118,555	2.7	320,099	42,927	7.5
2023	123,956	2.7	334,681	42,927	7.8
2028	128,244	2.7	346,259	42,927	8.1
2033	131,512	2.7	355,082	42,927	8.3
2036	133,199	2.7	359,637	42,927	8.4

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

8.5 Ten Pin Bowling

8.5.1 The most popular ten pin bowling facility in the Study Area is the MFA Bowl on Greenbank Street, Preston, which attracts 33.1% of all ten pin bowling trips in Study Area. There are no formal ten pin bowling facilities within Chorley town centre.

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

Zone	Address	Total
1	MFA Bowl, Greenbank Street, Preston	33.07%
OSA	Hollywood Bowl, Middlebrook Retail & Leisure Park, The Linkway, Horwich	29.37%
1	Level, Lancaster Road, Preston	18.76%
OSA	Premier Bowl & Laser, Ocean Plaza, Marine Drive, Southport	10.07%

Source: Question 46 of Household Survey, Appendix 7. Includes all responses located within Study Area and those receiving more than 4.0% of total market share of trips outside Study Area

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

- 8.5.2 The ten pin 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 Mintel³⁴ forecasting modest market growth equivalent to approximately 6% per annum between 2016 and 2020, slowing in 2020 to approximately 3% growth. An alternative business model has recently developed for in-centre 'boutique' bowling facilities, with a greater focus on food and beverage 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 nightclub venues, where the market has been found to have contracted in recent years. Participation in ten pin bowling is found to have remained relatively popular amongst both young adults and families. Mintel identifies that 54% of 16 to 34 year olds visited a bowling alley within the last year, with this reducing to 41% of those aged between 35 to 44, and 13% of those aged 45+.
- 8.5.3 In terms of the expected benchmark level of provision in the Study Area, we note that the Mintel Tenpin Bowling report of May 2017 identified that there were 5,242 bowling lanes across the UK in 2017. This represents a decrease from the reported figure of 5,617 in 2014. Given that the UK population at 2017 is approximately 66.2 million³⁵, this equates to one lane for every 12,630 persons. Based on the estimated population within the Study Area, our assessment indicates that 39.0 lanes could be supported at 2018, increasing to 41.1 lanes at 2036. Within Chorley, the identified need equates to 9.4 lanes at 2018, increasing to 10.5 lanes at 2036.

³⁴ 'Tenpin Bowling', Mintel, May 2017

³⁵ 'Population Estimates for UK, England and Wales, Scotland and Northern Ireland: Mid-2014', Office for National Statistics, June 2015



Table 8.7: Ten Pin Bowling Requirement in Study Area and Chorley

Year	Study Area Population	Typical Population Required to Support One Ten Pin Lane	Potential Number of Ten Pin Lanes Supported in Study Area	Chorley Population	Potential Number of Ten Pin Lanes Supported in Chorley
2018	492,765	12,630	39.0	118,555	9.4
2023	501,857	12,630	39.7	123,956	9.8
2028	509,996	12,630	40.4	128,244	10.2
2033	516,213	12630	40.9	131,512	10.4
2034	519,203	12,630	41.1	133,199	10.5

Note: Typical number of persons required to support a bowling lane derived from Mintel Tenpin Bowling report of May 2017

- 8.5.4 There is no formal ten pin bowling facility within Chorley town centre, with the closest facilities being at Bolton and Preston. The current requirement based on the average attendance in the UK is for a single facility with up to 10 lanes (although it would be unlikely to deliver a facility of this size). This is due to the current commercial market, and it is unlikely that a scheme including a traditional ten pin bowling facility or indeed anchored by such a facility, will be commercial viable.
- 8.5.5 Larger centres have seen the delivery of boutique style bowling facilities which offer a wider range of facilities alongside bowling, including a bar and a restaurant. Such facilities act as destinations in their own right, and add to both the daytime and night time economies within centres. Operators typically occupy large, open plan units which form part of wider commercial destinations and which are surrounded by existing leisure facilities such as pubs, bars and restaurants. Visitors are typically seeking an activity as part of an afternoon or night out, linking their trips with a meal and drinks.
- 8.5.6 Boutique style bowling facilities have traditionally been focussed in larger city and town centres, where the footfall and the demand is high. It may be that the delivery of the Market Walk scheme will improve the attraction of Chorley town centre to prospective leisure operators, and a boutique style facility may be a viable use. Whilst we do not consider it necessary to allocate a site within the town centre for a ten pin bowling facility, such a use may be forthcoming in the future should the market continue to grow and should be directed to the defined town centre in the first instance in accordance with local and national planning policies.

8.6 Health and Fitness Centres

- 8.6.1 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. Mintel³⁶ records that, at September 2017, 32% of adults were found to use a local authority owned health centre or swimming pool. This is a minor reduction from the figure of 33% recorded in 2015 and a further 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 health and fitness centres to compete with private facilities remains a key challenge.
- 8.6.2 Mintel³⁷ forecasts indicate that the private health and fitness sector had a market value of approximately £2.9 billion in July 2016. This is forecast to continue to grow substantially by approximately £200 million per year, reaching 3.9 billion in 2022. Mintel also notes that, whilst only 12% of adults currently use a private health and fitness club, the potential for a further expansion of the 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.
- 8.6.3 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. Mintel 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 (930,000) and clubs (176). It should be noted that Pure Gym has continued to rapidly expand year on year in terms of the number of members and sites, which were previously reported by Mintel as being 520,000 (members) and 99 (sites) in 2015. At the same time, Pure Gym's main competitor, The Gym, has also greatly increased its membership since 2015 from 350,000 to 535,000 members and 63 to 100 clubs, albeit more modestly. Nuffield has emerged as the largest 'full service' health club chain with 476,000 members and 112 sites, overtaking David Lloyd Leisure (407,095 members, 83 sites) and Virgin Active Group (251,000 members, 61 sites) who were the

³⁶ 'Leisure Centres and Swimming Pools', Mintel, September 2017

³⁷ 'Health and Fitness Clubs', Mintel, July 2017

largest in 2015. Mintel has predicted 25% growth for the private sector health and fitness market up to 2022, to reach a value of £3.9 billion.

- 8.6.4 The latest in-depth survey of the UK fitness club market entitled 'Project Fitness UK 2018' published by Allegra Strategies, estimates that the UK fitness club market is expected to continue to grow and indeed, be the fastest growing business sector. The report identifies there to be opportunities in high street locations due to closures of other retail and leisure operations, but that increased competition from the range of choice of private sector operators will continue to put pressure on the public sector offer.
- 8.6.5 The private health and fitness clubs typically seek premises between 10,000 sq.ft (929 sq.m) for the low cost, budget style of facilities such as Pure Gym, The Gym, Energie Fitness, Xercise4less, Lifestyle Fitness and Sports Direct Fitness, to upwards of 80,000 sq.ft (7,432 sq.m) for the higher end, premium facilities such as Nuffield Health, David Lloyd, Bannatyne and Virgin Active.
- 8.6.6 Table 8.8 below sets out the health and fitness market share attracted to each of the health and fitness facilities within the Study Area. The health and fitness trips are spread out across a number of existing facilities within the Study Area as a whole, with the principal destinations being the Fulwood Leisure Centre in Preston (7.4%), followed by the All Seasons Leisure Centre in Chorley (6.6%).

Table 8.8: Study Area Market Share of Trips to Health and Fitness Centres (%)

Zone	Address	Total
3	Fulwood Leisure Centre, Black Bull Lane, Fulwood, Preston	7.43%
10	All Seasons Leisure Centre (Active Nation), Water Street, Chorley	6.59%
8	Leyland Leisure Centre, Lancastergate, Leyland	4.65%
1	Total Fitness, West Strand Road, Preston	4.47%
7	Bamber Bridge Leisure Centre, Brindle Road, Bamber Bridge	4.43%
3	West View Leisure Centre, Ribbleton Lane, Preston	4.20%
7	Nuffield Health Fitness & Wellbeing Gym, Capitol Centre, Walton-le-Dale	3.66%
12	David Lloyd, Moss Lane, Whittle-le-Woods, Chorley	3.42%
6	Penwortham Leisure Centre, Crow Hills Road, Penwortham	3.17%
8	Gymetc, King Street, Leyland	3.10%
14	Ribby Hall Village Health Club and Gym, Ribby Road, Ribby, Kirkham	2.93%
3	GymWorks, Pittman Way, Fulwood, Preston	2.70%
4	Preston Marriott Leisure Club, Garstang Road, Broughton, Preston	2.33%
2	DW Sports Fitness, Port Way, Riverside, Preston	2.14%

Source: Question 48 of Household Survey, Appendix 7. Includes all responses located within Study Area and those receiving more than 2.0% of total market share of trips outside Study Area

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

- 8.6.7 In terms of residents in Zones 10, 11 and 12 in particular, the principal destinations for health and fitness trips are the All Seasons Leisure Centre in Zone 10 which attracts 29.4%, 22.5% and 10.2% of trips respectively, followed by the David Lloyd in Zone 12 (9.4%, 14.7% and 4.4% respectively) and the Gymtec in Leyland (Zone 8) which attracts 0.0%, 10.6% and 14.1% respectively.
- 8.6.8 The All Seasons Leisure Centre is located within walking distance of Chorley town centre adjacent to the Asda foodstore and is therefore an important facility for both the Borough but also the town centre, and is a popular choice for residents particularly in Zones 10, 11 and 12. The Leisure Centre includes a swimming pool, gym, exercise studios, racket sport facilities, creche facilities, along with a café and adjacent car parking. Given its location, it provides facilities for a wide range of residents, including those in walking distance or those by public transport given its proximity to a number of public transport modes.
- 8.6.9 National multiple fitness operators typically occupy modern, large format units both on high streets and on standalone retail parks. Whilst we do not recommend that the Council allocates specific sites within the defined centres to accommodate such uses, proposals for

new health and fitness clubs should be supported by the Council subject to the relevant policy tests and in particular, the potential implications new operations could have on the public sector leisure facilities within the Borough.

- 8.6.10 In terms of private national multiple health and fitness clubs, we are aware of the Anytime Fitness Club located on New Market Street in Chorley and the David Lloyd located to the north on Moss Lane in Whittle-le-Woods. Given the overall qualitative offer of private sector national multiple brands, there may be a market for additional private national multiple gym operators to enter the market in Chorley, to provide additional choice to residents but again this will be dependent on operator demand. Reviewing therequirementlist.com, which is an online resource connecting commercial occupiers to the property industry through commercial agents and operators, Snap Fitness has a current requirement for a new facility within Chorley, seeking between 4,000 sq.ft and 10,000 sq.ft of Class D2 space, either within or on the edge of the town centre, subject to good visibility and accessible parking.

8.7 Food and Drink

- 8.7.1 Consumer spending on eating out through visits to restaurants and takeaways is recognised as a sector which has performed well during the economic downturn. Mintel³⁸ identifies that the eating out market grew by around 14% between 2012 and 2016, to an estimated £66bn, and predicts that the market will continue to experience growth, forecast to be around 11% in the period up to 2022 to reach a value of £75 billion. The emergence into the restaurant market of multiple new specialist operators, many with significant plans for expansion, has increased opportunities for landlords to provide a diverse and distinct food offer.
- 8.7.2 A recent report by Savills³⁹ 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.

³⁸ 'Eating Out Review', Mintel, Sep 2017

³⁹ Casual Dining in the UK, Savills, June 2016

8.7.3 Despite significant pub closures in recent years, there is reason for optimism within the licensed premises sector. The Cask Report⁴⁰ reporting that six fewer pubs are closing a week in 2017 than in 2016. 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 79% of adults visited a pub or bar in 2016/17 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 6.3% in the last 5 years⁴¹. Nevertheless, a quality food offer has become increasingly important within the sector, as the contribution which food sales make to pub revenues has increased steadily over a prolonged period.

Table 8.9: Study Area Market Share of Trips to Restaurants (%)

Zone	Address	Total
1	Preston City Centre	23.04%
10	Chorley Town Centre	8.60%
8	Leyland Town Centre	4.56%
OSA	Manchester City Centre	3.56%
5	Longridge Town Centre	3.37%
OSA	Other, OSA	2.93%
OSA	Blackburn Town Centre	2.92%
OSA	Middlebrook Retail & Leisure Park, Horwich, Bolton	2.38%
OSA	Lytham Town Centre	2.28%

Source: Question 44 of Household Survey, Appendix 7. Includes all responses located within Study Area and those receiving more than 2.0% of total market share of trips outside Study Area
 Note: 'OSA' relates to facilities outside of the Study Area

8.7.4 In terms of the existing food and drink provision within the defined centres, the most popular destination for restaurant use is Preston city centre which attracts 23.0% of trips, followed by Chorley town centre which attracts 8.6%. Outside of the Study Area, Manchester city centre attracts 3.6% of the trips from residents in the Study Area.

8.7.5 There are signs that the independent restaurant sector remains relatively positive, and as such, there are opportunities to expand and build on the existing offer particularly within Chorley town centre to serve both visitors and residents.

8.7.6 Chorley's existing restaurant offer is relatively limited, with the food and beverage sector focussing more on public houses instead of family orientated restaurants. The town centre also accommodates a number of take away operators which do not provide an option for

⁴⁰ 'Pub Visiting' Mintel, May 2017

⁴¹ 'The Cask Report 2015-16', Cask Matters, September 2015

leisurely dining. However, we are aware that the national chain The Lounges has shown interest in accommodating a unit within the Market Walk development, which is a significant 'win' for the town centre, bringing in a popular restaurant and bar which could encourage additional visitors into the town centre and further increase investor confidence. Whilst the market is not as strong as it was from a food and beverage perspective, operators are still continuing to open new stores to expand their portfolio across the UK as a whole, including Wagamama and Nando's. Such operators will typically accommodate modern format units ranging from approximately 250 sq.m (gross) to 750 sq.m (gross).

- 8.7.7 There is likely to be further demand for national multiple restaurant operators, particularly following the opening of the Lounges, demonstrating that the centre is 'fit for purpose' for additional restaurant operators.

8.8 Other Leisure Uses

- 8.8.1 In recent years, the presence of leisure facilities such as trampolining centres, climbing walls and soft-play centres have increased substantially across the UK.
- 8.8.2 In an increasingly competitive retail environment, centres are seeking more adventurous and exciting leisure operators to provide differentiation and draw consumers in.
- 8.8.3 Trampoline parks for example, offer a broad range of activities, from children's parties, fitness classes, corporate team building activities, to teen and adult club nights, whilst most also have onsite cafés. The same can be said for climbing walls and soft-play centres, where a wide range of activities are present alongside the main leisure facilities.
- 8.8.4 As is the case in Chorley, these facilities generally occupy relatively large (500 sq.m to 2,500 sq.m) units with high ceiling heights and are often found in former employment or retail premises on business parks and retail parks. As such, applications to change the use of the premises to allow the use by Class D2 operators if the units are located outside of the defined town centre, will need to be assessed against the relevant main town centre use planning policies of the sequential and impact tests.
- 8.8.5 While it acknowledged sites in prime locations with high footfall would likely continue to prosper, the experience side of leisure, such as crazy golf, ping-pong and escape rooms, are all important leisure elements which draw visitors into a centre. Whilst typically aimed at the younger generation, they do offer an experience which can ensure a centre stands out and provides something which is qualitatively different.

9.0 Summary of Findings and Recommendations

9.1 Introduction

- 9.1.1 This Retail and Leisure Study has been undertaken to establish current provision and future needs in the retail and commercial leisure sectors within the Borough over the plan period. Given the time that has elapsed since the previous study was produced for Central Lancashire in 2010, it was considered appropriate to undertake an entirely new study.
- 9.1.2 In addition, this Study provides additional recommendations in respect of other potential policy guidance required to help support the future growth, improvement and regeneration of the defined centres, along with providing a list of recommended sites to meet the identified quantitative need for town centre uses, having regard to market deliverability factors, town centre hierarchy and national planning policy.
- 9.1.3 Our conclusions and recommendations made throughout the Study and below do not seek to materially alter these previous policy frameworks and guidance adopted by the Council, particularly given that we consider these to be a good basis upon which to build our latest policy recommendations. Instead, the purpose is to provide updated recommendations based on the latest household and health check findings, along with the recent retail and leisure trends which have impacted upon the commercial markets but which will also continue to do so. It is important to plan positively, taking account of the realisms of the market and other external factors which in some cases may be beyond the Council's control. Furthermore, a key concept of local and national policy is to concentrate on the protection of defined centres but also acknowledging that there are a range of uses suitable to be accommodated in defined centres beyond the 'traditional' retail uses.
- 9.1.4 The adopted Local Plan seeks to protect the hierarchy of centres within Chorley and deliver and protect new commercial development within the town centre. The findings of this Study will provide the Council with sufficient evidence to justify the protection of the centres moving forward, in controlling future out of centre development which compete directly with the health of the defined centres in the Borough, whilst seeking to build on the success of Chorley town centre's market town status, bringing with it a successful indoor and outdoor market and town centre events.
- 9.1.5 The purpose of this section therefore, is to set out the key findings from each of the elements of the study, from both a quantitative and qualitative need perspective, and

provide recommendations on appropriate policy responses for the new Local Plan to address the key issues raised in the research.

9.1.6 We start this section by assessing the key findings in respect of retail need within Chorley, having regard to the current market share claimed by destinations in the administrative area but also specifically within the town centre. The second part of this section sets out WYG's recommendations in terms of policy objectives to help guide future town centre policies and how these will assist in shaping the defined centres in the future to meet residents' needs.

9.1.7 It is useful to set out at this juncture the national policy guidance in respect of ensuring the vitality of town centres. Paragraph 85 of the NPPF indicates that local planning authorities should:

- a. define a network and hierarchy of town centres and promote their long-term vitality and viability – by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters;
- b. define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre;
- c. retain and enhance existing markets and, where appropriate, re-introduce or create new ones;
- d. allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability, so town centre boundaries should be kept under review where necessary;
- e. where suitable and viable town centre sites are not available for main town centre uses, allocate appropriate edge of centre sites that are well connected to the town centre. If sufficient edge of centre sites cannot be identified, policies should explain

how identified needs can be met in other accessible locations that are well connected to the town centre; and

- f. recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites.

9.1.8 The national policy position has informed the Study and its requirements which, where relevant, are considered in relation to Chorley's administrative area below.

9.2 Key Findings: Quantitative Need

9.2.1 Section 7.0 of the Study sets out the full assessment of the quantitative capacity for additional floorspace in Chorley across the study period. This assessment provides floorspace capacity figures based on a series of assumptions and estimated forecasts over the short, medium and long term.

9.2.2 As we have set out in the Study, longer term growth rates and capacity estimates should be treated with caution given the inherent uncertainties of predicting the economy in the future. For example, spending on convenience goods on a yearly basis has decreased per person in recent years, with a similar trend set to continue over the next ten years or so. On average following the recession, households chose to cut back on convenience goods spending, and at the same time increasing spending on comparison goods. This is partly explained by the fact that prices of convenience goods have continuously risen, while those of comparison goods saw little growth and therefore by consuming fewer convenience goods, some households had more money available to spend on comparison goods. Furthermore, the squeeze on household incomes continues, along with inflation remaining above wage growth, resulting in retail spending remaining on a slower growth trajectory.

9.2.3 Based on the current retention rates within the Borough, we do not identify a quantitative requirement for any additional convenience goods floorspace within Borough's catchment up to 2036 once existing commitments are considered.

9.2.4 In terms of comparison goods floorspace requirements, again based on a constant market share across the Borough, we do not identify any quantitative capacity for additional comparison goods floorspace across the Study Area once commitments are considered.

9.2.5 The principal reason for the reduction in any identified capacity for additional comparison floorspace is the presence of the extant commitments both within and outside of the Borough, including the committed floorspace at Botany Bay, the committed floorspace at

Market Walk and the floorspace associated with Cuerden Investment Site, from which a proportion of the trade (estimated to be approximately 15%) is estimated to be drawn from Chorley's administrative area. The total comparison turnover of the commitments expected to be drawn from Chorley's administrative area is £67.7m, which is a substantial quantum of expenditure which is expected to be drawn from residents in Chorley. Indeed, the Market Walk scheme is expected to have a comparison turnover of approximately £9.6m, of which we assume 80% will be drawn from residents in Chorley (particularly given that we expect Market Walk to have a wider draw following completion of the extant scheme), which represents over 14% of the total turnover of the commitments. However, it has to be acknowledged that the Market Walk scheme will add to the overall turnover and vitality and viability of the centre once completed.

- 9.2.6 Based on the above, we have not identified any quantitative capacity for additional comparison floorspace within the Borough of Chorley following commitments, but it is important to acknowledge the importance that the Market Walk scheme will have in meeting local residents' leisure and retail requirements within the town centre, along with drawing visitors back into the centre from further afield.

9.3 Key Findings: Qualitative Need

- 9.3.1 In assessing the potential qualitative need for additional retail provision, whilst this is a more subjective matter, there are important factors to consider when reviewing the existing provision within the administrative area. Issues such as 'gaps' in existing provision, ensuring that communities have easy access to retail facilities and that there is a range of operators to provide choice to residents, along with location specific needs such as higher levels of deprivation, all need to be taken account of when assessing the qualitative need.
- 9.3.2 As set out in detail above, we have not identified any quantitative capacity for additional convenience floorspace across the borough, once committed convenience floorspace has been taken into account.
- 9.3.3 However, access to mid to large format foodstores with over 1,500 sq.m of net floorspace, which offer residents a full range of convenience products, is more limited outside of Chorley. We have identified that there is a gap in the provision of larger foodstores serving the remaining main areas of population within and surrounding Eccleston (Zone 11) and Adlington (Zone 13).

- 9.3.4 In terms of both Zones 11 and 13, it is important to note the current commercial market and the types of operators who are actively seeking to expand their portfolio (the discount end of the market, i.e. Aldi and Lidl). Should either retailer seek additional presence in Chorley, and particularly Ecclestone and Adlington, any proposal should be directed in the first instance to the defined centres in accordance with policy.
- 9.3.5 Turning to the qualitative need for comparison goods, we focus primarily on Chorley town centre, which – as the largest centre in the Borough – is most likely centre to attract interest from retail operators and developers. We also consider the need for new comparison goods provision in the two district centres of Buckshaw and Clayton Green. Significant comparison goods retail development would not be appropriate in the local centres in Chorley.
- 9.3.6 The clothing and footwear provision in Chorley town centre was identified as below the UK average in terms of the proportion of outlets and floorspace. It is notable that there is no department store in Chorley town centre and no Marks & Spencer store, although it is recognised that the Marks & Spencer Simply Food store will be provided at the Market Walk development and will provide a click and collect facility for the full range of M&S products. Other key fashion retailers not present in the centre include H&M, Dorothy Perkins, Next, Monsoon Accessorize, TK Maxx, Wilko, Waterstones and River Island.
- 9.3.7 Understanding the precise commercial market requirements within Chorley will be key to deliver any future growth, particularly given the presence of both Preston and Bolton centres and Manchester and the Trafford Centre further afield.
- 9.3.8 In terms of Buckshaw and Clayton Green district centres, our health check found that the overall quantity and breadth of comparison retail provision is below the level expected for a district centre of their respective sizes. We consider that this deficiency is largely due to the proximity of and competition from Chorley town centre and indeed, Preston city centre and out of centre floorspace, along with the lack of larger and modern retail units to accommodate 'high street' multiples. Whilst the residents of both will and should continue to be attracted to the shopping facilities in Chorley town centre as the principal centre in the borough, the centres should be able to better meet the basic comparison goods needs of its residents. The attraction of more comparison goods retailers to the district centres would benefit its overall vitality and viability.

9.4 Key Findings: Commercial Leisure

- 9.4.1 Section 8.0 of the Study provides an assessment of commercial leisure needs across the Borough, using the results from the household survey.
- 9.4.2 In terms of 'traditional' commercial leisure uses (bingo halls, cinemas and ten-pin bowling facilities) we have identified that there is a requirement for a ten-pin bowling facility and cinema facility within the Borough. There are no ten-pin bowling facilities or cinema screens within Chorley Borough.
- 9.4.3 There may be the potential for an additional bowling facility within Chorley, but due to the current market and general lack of investment and decline in this sector, operators may not be forthcoming. Discussions with commercial agents would be useful in this regard to establish if there was a market in Chorley for facilities and the potential for boutique style facilities which offer wider food and beverage opportunities too, encouraging longer stays and a more varied experience, particularly within the evening.
- 9.4.4 We note that the extant Market Walk scheme will deliver six new cinema screens alongside new retail and leisure facilities. This will assist to attract residents back into the centre and help to encourage increased dwell-time. All efforts to protect this scheme from competition, particularly at out of centre sites must continue, with appropriate policy control included in the forthcoming local plan through the sequential and impact assessments. This will ensure that any alternative scheme not in Chorley town centre will be controlled accordingly.
- 9.4.5 Paragraph 016 of the NPPG provides guidance on the impact tests. In terms of the potential impact on investment, the guidance states that where wider town centre developments or investments are in progress, it will also be appropriate to assess the impact of relevant applications on that investment. The guidance states that key considerations will include:
- The policy status of the investment (i.e. whether it is outlined in the development plan);
 - The progress made towards securing the investment (i.e. if contracts are established); and
 - The extent to which an application is likely to undermine planned developments or investments based on the effects on current / forecast turnovers, operator demand and investor confidence.

- 9.4.6 As such, it is vital that the impact test applied within the Central Lancashire Local Plan follows the guidance set out within the NPPF and its supporting NPPG. This will ensure that competing edge or out of centre schemes can be fully appraised through the submission of a supporting impact assessment, with particular focus on the impact on the Market Walk investment scheme. Chorley is in a strong position to restrict other competing schemes from coming forward, given the progress made to date on Market Walk.
- 9.4.7 In terms of health and fitness centres, we conclude that the existing provision is appropriately distributed across Chorley's key settlements and as such, Chorley appears to be relatively well provided for. However, there may be opportunities for further private sector fitness clubs to be brought forward throughout the borough and in the defined centres in particular, serving both local needs but also the needs of office workers within the town centre. New proposals for gyms and health and fitness centres should be judged on their own merits and in accordance with local and national policy, with a town centre first approach where suitable sites are available. It may be that any such uses would come forward as part of a wider mixed-use scheme.
- 9.4.8 In terms of the existing food and drink provision, there are signs that the independent restaurant sector remains relatively positive, and as such, there are opportunities to expand and build on the existing offer particularly within Chorley town centre to serve both visitors and residents. There are operators who are seeking to expand their portfolio and discussions with operators directly would be beneficial to establishing future requirements in Chorley subject to the right scheme and provision of suitable units. Such uses can increase 'dwell time' within the centre and a diverse restaurant offer can encourage a wider range of users to visit Chorley town centre. We understand that the Market Walk development is hoping to deliver a unit suitable for the Lounges – a national multiple food and beverage operator who is actively seeking to expand its portfolio, despite current uncertain times.
- 9.4.9 However, the existing and proposed national multiple offer of restaurants, particularly family-orientated restaurants is limited and there may be potential to attract additional operators to the centre, particularly on the back of the development at Market Walk. Operators such as Nando's, Wagamamas etc provide a pull for residents to visit a centre, and although there is no evidence to suggest that these operators are actively seeking presence in the town centre, should a suitable scheme come forward which offers the accumulation of appropriate uses to generate sufficient footfall, such as the Market Walk scheme, then such operators may be more approachable.

- 9.4.10 We acknowledge that the independent restaurant offer in Chorley town centre is relatively good, and that these operators should be protected moving forward through appropriate planning policy via the sequential and impact tests. The independent offer acts as a draw to the centre, offering a qualitatively different appeal for residents, and in assessing any competing edge or out of centre applications, the Council should give weight to the potential implications of alternative proposals on the independent offer, along with the national multiple offer.
- 9.4.11 However, we do believe there is scope to enhance the overall restaurant offer within the town centre and this could be done by providing modern format units of an appropriate size to accommodate them.

9.5 Town Centre Strategy and Allocations

- 9.5.1 One of the main challenges facing Chorley is the competition from higher order centres which are located in close proximity to the local authority area, such as Preston, Bolton and Blackburn, along with Middlebrook Retail Park, the Trafford Centre and even Manchester city centre. Proportions of expenditure, particularly on comparison goods, are leaking outside of the Borough to Middlebrook Retail Park in particular. This draw is due to the overall offer provided at these competing destinations, which typically provide a wider range of national multiple retailers alongside a substantial number of leisure operators, all with adjacent free car parking and easy access of main arterial routes.
- 9.5.2 Given the presence of these higher order centres, the opportunities to attract investment from national multiples to the town centre are somewhat limited. Accordingly, it is considered the Council should concentrate on supporting the town centre to provide a distinct offer which sets it apart from the offer of the nearby higher order centres.
- 9.5.3 It has to be acknowledged that the extant Market Walk scheme is a significant scheme in the context of Chorley's wider offer, and is a strong sign to the outside that there is investor confidence in the town. The confirmation of key agreements from national multiple leisure operators again demonstrate that Chorley is a viable town to open new format operations in.
- 9.5.4 We are of the view that methods to resist future out of centre development includes the imposition of tighter planning controls through planning policy documents e.g. Supplementary Planning Documents (both through the adopted development plan but also standalone guidance documents). This is particularly the case given the relatively recent permissions at both Botany Bay and Cuerden, and the requirement therefore to ensure that

these schemes to do not continue to expand, with likely detrimental effects on the health of the town centre. We set out in further detail below our recommendations with regard to local impact thresholds, which will provide the Council with greater control over edge and out of centre commercial development.

- 9.5.5 We provide further conclusions in relation to our recommended local impact threshold below. However, in summary, we are of the view that the provision of a local impact threshold is necessary in order to allow the Council to control out-of-centre retail and leisure development in the local authority area. Given that in-centre destinations in Chorley are facing increasing competition from out-of-centre destinations both within and outside of the Borough, we consider it is key to maintain a local impact threshold. We note however that the revised NPPF only requires impact assessments to be undertaken for retail and leisure development, with the requirement for an impact assessment of office developments having been removed. We consider this change should be taken forward to the revised Local Plan.
- 9.5.6 A key purpose of any future strategy should be to seek to extend 'dwell time' and spend of both residents and visitors to the town centre, which in turn will help to enhance the overall vitality and viability of the centre. It would also be useful to understand whether operators are seeking to expand their portfolio by opening a new unit within the centre or even improve their offer in the centre by relocating to modern floorspace. As the Council is aware, there is often a preference to locate to out of centre destinations given viability matters, but if a site can be offered within the town centre for both comparison and leisure operators, then this needs to be explored further.
- 9.5.7 We note that the Council is seeking to update the town centre Masterplan, and we consider this to be an important step in protecting the future vitality and viability of the centre moving forward. Providing a robust, yet flexible strategy which can evolve subject to commercial demands and the ever-changing market is important to encourage investment and draw shoppers back into the town centre. This goes beyond just the creation of new floorspace, but also wider public realm improvements and the ongoing encouragement of town centre festivals and events. Food and drink markets for example, draw in a substantial number of visitors into centres, with associated knock-on benefits for existing operators within the centre. Indeed, the Chorley market acts as an important driver of footfall within the centre and the future refurbishment and improvement of the indoor market will be key in securing its longevity.
- 9.5.8 The digital shopping revolution has significantly impacted the high street by offering consumers convenient alternatives to simply transact with business than in the traditional

physical manner. The Council launched free wifi across the town centre in December 2018. Therefore, WYG recommends that the Council considers initiatives to digitise the town and district centres in Chorley to help them adapt and engage with the digital revolution that is transforming the ways we shop and buy products - failure to embrace such structural changes may result in Chorley's district centres in particular falling being in comparison to other centres which are harnessing the opportunities which exist with regards to digital mediums. Ensuring that businesses have an online presence through training courses and wider stakeholder encouragement will increase community engagement and provide the platform to advertise both businesses and events to the community.

- 9.5.9 As we have set out above, we consider it is important for the town and district centres within Chorley to provide a distinct offer which sets them apart from nearby higher order centres, improvements to the digitalisation of the town and district centres' high streets may be one way to do this. For example, the provision of additional click and collect facilities within Chorley's town and district centres could act to encourage additional visitors to these centres who may then stop longer in the centre to purchase other products and services. Such facilities will provide residents of Chorley access to operators or brands which may not be available in the local authority area in the form of a physical shop, rather than travelling further afield to access these products and services. Measures could also include encouraging businesses within Chorley's town and district centres, including independent retailers, to deliver OMNI channelling, which basically supports all formats of trading platforms, from website, to smartphone, click and collect to traditional bricks and mortar channels. This multiple channel approach will assist businesses in the Chorley's centres by maximising interactions with both physical and digital consumers.
- 9.5.10 There are inherent difficulties in planning for the improvement of town centres in the current commercial climate and the associated lack of funding and confidence from landowners to bring forward larger scale investment schemes (which is the case across the UK but particularly in town centres). Indeed, given the lower order status of Chorley's defined centres when compared with the nearby centres of Preston, Blackburn and Bolton, there will likely be difficulties in attractor new operators. Notwithstanding this, there may be opportunities to enhance and redevelop smaller parcels within Chorley's defined centres, alongside the ongoing support of the development of the Market Walk extension. The investment in property brings with it both economic and ownership benefits, regaining control over assets in the centre and regenerating key buildings.

- 9.5.11 In addition, we recommend that the re-use and regeneration of existing vacant floorspace in the town centre should be supported, in accordance with national policy guidance which encourages the sustainable use of vacant stock. The re-occupation and redevelopment of this vacant floorspace, should be seen as a priority in order to improve the vibrancy of the Chorley's town centre, and should be supported where in accordance with other policies of the Development Plan. Long-term vacancies can alter visitor's perceptions of centres, particularly when larger vacant units are situated within the 'heart' of a centre. Without intervention, these longer-term vacancies can degrade quickly, causing issues from an aesthetic point of view, along with wider implications in terms of attracting new operators to the centre.
- 9.5.12 We note that one key site within Chorley town centre; Oak House Hotel on High Street and the adjacent brownfield site, has been made into a formal car park to serve the town centre, which substantially enhances the area by removing long-term vacant units and a derelict site, whilst improving the parking offer. The other key priority for the Council will be to consider options for the former Post Office on Cleveland Street, which is being actively marketed (although not the BT Exchange located on the upper 2 floors). We note that the Council confirmed in 2015 that prior approval was not required for the change of use from Class B1a to Class C3 (dwellings) on the unit adjacent to the Post Office. The proposed plans which accompany application reference 15/00758/P3PAJ, provide details of how five dwelling houses can be accommodated at first and second floor. As such, it may that additional residential uses could be accommodate within the Post Office building too.
- 9.5.13 The increase in residential uses within Chorley town centre, alongside additional business uses will both attract additional footfall into the centre, which in turn will have wider economic benefits for the town centre.
- 9.5.14 Reflecting the uncertainty in forecasting long-term retail trends, the revised NPPF has removed the requirement for local plans to meet identified needs 'in full' over the local plan period under the previous version. The NPPF states at paragraph 85 that planning policies should '*...allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead...*'. Policies therefore only need to look at least ten years and not necessarily over the full plan period when allocating sites to meet the 'likely' need for town centre uses.
- 9.5.15 Paragraph 85 of the NPPF continues that planning policies should, '*where suitable and viable town centre sites are not available for main town centre uses, allocate appropriate edge of centre sites that are well connected to the town centre. If sufficient edge of centre sites*

cannot be identified, policies should explain how identified needs can be met in other accessible locations that are well connected to the town centre'.

- 9.5.16 As summarised above, there is no capacity identified for either convenience or comparison goods floorspace within the short, medium or long term across the study period to 2036. National policy guidance states that sites should be allocated in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. As such, as we have not identified any quantitative capacity, we do not consider that the Council should be allocating a range of sites within Chorley town centre (or indeed any other defined centre) for large format commercial development. The one exception to this is the Flat Iron car park allocation, which has been allocated for commercial development for a number of years and now has an extant permission under which development has commenced. Whilst there is no identified quantitative capacity, there is an acknowledgement from the Council and WYG in assessing the current shopping and leisure patterns and vitality and viability of the centre, that the new development to deliver retail, leisure and commercial floorspace is important to the town centre and will substantially enhance Chorley as the commercial destination for residents of Chorley.
- 9.5.17 The 2015 Local Plan allocated four sites within Chorley town centre for retail development as follows:
- EP5.1 – Flat Iron Car Park
 - EP5.2 – Bolton Street/Pall Mall
 - EP5.3 – 5-9 Gillibrand Street
 - EP5.4 – High Street/Cleveland Street
- 9.5.18 In terms of allocation EP5.1, whilst this has extant permission, it is important that the Council continues to protect the site from competing out of centre development and therefore retaining its allocation within the Local Plan will be vital.
- 9.5.19 The Bolton Street/Pall Mall site (allocation EP5.2) has been built out, with the Asda foodstore now accommodating a prime site within Chorley town centre. This can be removed as a site allocation in the forthcoming local plan.
- 9.5.20 Finally, turning to allocations EP5.3 and EP5.4, both sites are now formal long-term car parks and therefore the redevelopment of both is now highly unlikely, particularly over the plan

period. Given we agree with the Council's stance that there is no identified capacity over the plan period for either convenience or comparison goods, these two sites can be removed from the allocations within the town centre.

9.6 Policy Recommendations: Defined Centre Boundaries

9.6.1 A series of recommendations are provided in respect of appropriate centre boundaries for the town, district and local centre. These recommendations are provided at Appendix 4 and summarised below in respect of Chorley town centre.

9.6.2 In recommending appropriate boundaries, we have taken into account the definitions provided in the revised NPPF as follows.

Primary Shopping Area – Defined area where retail development is concentrated.

Town Centre – Area defined on the local authority's policies map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in the development plan, existing out-of-centre development, comprising or including main town centre uses, do not constitute town centres.

Main Town Centre Uses – Retail development (including warehouse clubs and factory outlet centres); leisure, entertainment and more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).

9.6.3 It should be noted that the revised NPPF no longer sets out that local planning authorities should identify primary and secondary frontages. However, the removal of this text from the NPPF does not preclude local planning authorities from identifying primary and secondary frontages where they can be justified.

Chorley Town Centre

9.6.4 As detailed in Section 7.0, paragraph 85 of the NPPF indicates that planning policies should 'define the extent of town centres and primary shopping areas, and make clear the range of

uses permitted in such locations as part of a positive strategy for the future of each centre'. The NPPF defines the primary shopping area as the defined area 'where retail development is concentrated' (p70) and the town centre as the defined area 'including the primary shopping area and areas predominantly occupied by main town centre uses within of adjacent to the primary shopping area' (p72).

- 9.6.5 Our recommended Town Centre Boundary and Primary Shopping Area (PSA) can be found on our Recommendations Map, which can be found at Appendix 4. These boundaries are recommended based on the findings of our site surveys and detailed analysis following that into the Health check indicators as set in National Planning Guidance.
- 9.6.6 Taking the town centre boundary first, we propose the southern boundary to be relocated to the end of market street, removing the Asda supermarket and the few small retail units which front onto Bolton Road. Whilst this appears to be a significant change, our assessment showed there was minimal interaction between this area and the remainder of the town centre, with the Pall Mall / Bolton Street / Market Street junction acting as a border between these two areas. Furthermore, the existing Asda store is situated to be at the furthest point of the site, with a large expanse of car parking separating the store from the rest of the town centre. We therefore do not consider it typically functions as part of the town centre and is an edge of centre scheme.
- 9.6.7 There have also been several proposed amendments to the western town centre, the majority of which relate to amending the boundary to accurately reflect the curtilage of individual sites and buildings. We have also proposed to include the Library Street car park due to its function of serving the town centre, the units on Gillibrand Street up to Lennon Street and Chorley Little Theatre. Other boundary alterations include the incorporation of the Chorley Youth Zone on Chapel Street.
- 9.6.8 Looking at the primary shopping area, we propose the tightening of the northern extent and an expansion of the east and western boundaries. We propose to include the units on the western side of Market Street from the A591 to West Street and also propose amending the eastern side to include the units on Chapel Street. We also propose the removal of the area currently occupied by the Flat Iron Car park – we understand the Councils intent in including this area following its allocation for retail led development in the 2015 local plan (and the site has permission for a new two storey development anchored by a cinema with restaurants) , however we consider its inclusion to not be appropriate until such time as development is completed and its role, function and relationship with the town centre is established and understood.

- 9.6.9 We note that the previous version of the NPPF recommended that local authorities additionally define primary and secondary frontages and set policies that make clear which uses will be permitted in such locations. However, this policy requirement is deleted from the revised version of the NPPF. The Ministry for Housing, Communities and Local Government has confirmed that the deletion of this requirement is to encourage a more positive and flexible approach to planning for the future of town centres due to the rapid changes taking place in the retail and leisure industries. However, the removal does not preclude local planning authorities from identifying primary and secondary shopping frontages where their use can be justified. The Council currently has primary and secondary retail frontages identified within the town centre, with the primary frontages generally confined to pedestrianised section of the town centre and the secondary frontages aligning the units fronting onto Market Street. We have not proposed the inclusion of primary and secondary frontages.
- 9.6.10 The proposed changes to the district and local centre boundaries are shown on the plans included at Appendix 6. In particular we recommend that:
- Buckshaw district centre – we propose that the existing boundary is tightened to remove the large areas of what are now residential uses and other ancillary uses, along with vacant land which is proposed to be brought forward for both residential and industrial uses. We recommend that the area opposite the existing terrace of commercial units is retained within the boundary given the extant permission which exists for additional commercial units and the benefit this would bring to the district centre.
 - Chorley Old Road local centre, Whittle-Le-Woods – we recommend that this centre is 'deallocated' given the very limited commercial offer it provides.
 - Eccleston local centre - we recommend that this centre is 'deallocated' given the limited commercial offer and presence of Carrington local centre just 300 metres from the centre boundary.
 - Eaves Lane (North) local centre, Chorley – we recommend that the boundary is tightened to remove the residential uses.
 - Eaves Lane (South) local centre, Chorley – we recommend that the boundary is tightened to remove the residential uses along the frontage.

- Lancaster Lane, Clayton – we recommend that the boundary is tightened to the north to remove the residential uses.
- Market Place, Adlington local centre – we recommend that the large commercial/industrial use is removed from the defined boundary to the east. The tightening of the boundary would not jeopardise any future edge of centre development progressing, subject to the proposal passing the relevant retail policy tests. However, given the length of time that has passed and the lack of any application to date, we consider it appropriate for the Council to retract the boundary, providing greater control over the protection of the existing commercial uses within the local centre.
- Park Road local centre, Chorley - we recommend that this centre is 'deallocated' given the very limited commercial offer it provides.
- Pilling Lane local centre, Chorley - we recommend that this centre is 'deallocated' given the very limited commercial offer it provides.
- Wheelton local centre – we recommend that the residential uses are removed from the boundary.

9.6.11 We note that the removal of three local centres (Chorley Old Road, Whittle-le Woods, Park Road and Pilling Lane) from the local authority's hierarchy may leave gaps from a qualitative perspective (see Appendix 9 for reference). However, it is important that the diversity of use and overall provision meets the general requirements of a local centre, in providing a range of uses to meet local residents' everyday retail, service and leisure needs (see the definition provided in the Annex). Indeed, there is no benefit in allocating one newsagent as a defined local centre, given that this one operator would not meet the requirements of residents.

9.6.12 The three centres we have proposed to be deallocated all provided limited, if any, retail, service and leisure facilities and are not performing their local centre function. In all cases, residents still have access to amenities in proximity and will not suffer as a result of the deallocation. There may be instances that the Council will be able to allocate new centres should they form, albeit in all three cases, we are not aware of any accumulation of commercial units in proximity which could replace the deallocated centres. For Example, Chorley Old Road appears to have been affected by the Co-op located to the north, resulting in just four commercial units in total, of which three are vacant. The opportunities to regenerate the centre are therefore very limited, and it is our view that alternative uses (for

example residential) should be explored. Both Pilling Lane and Park Road have already seen this transition, with residential uses present in place of the previous commercial uses.

9.7 Recommended Local Impact Threshold

9.7.1 In accordance with the requirements of paragraph 89 of the revised NPPF, it is appropriate to identify thresholds for the scale of edge of centre and out of centre retail, leisure and office development which should be the subject of an impact assessment. Any such threshold policy applies only to the impact test (all planning applications for main town centre uses that are not in an existing centre and not in accordance with an up-to-date development plan should be subjected to the sequential test⁴²).

9.7.2 Based on the findings of the Study and the recommendations provided above with regard to protecting Chorley town centre from trade diversion and further shifts in shopping patterns to out of centre floorspace, we are of the view that a lower threshold should be applied. Given the nature of the district and local centres, we are also of the view that thresholds should also apply to these centres too in order to protect their role.

9.7.3 Paragraph 89 of the NPPF states that:

'When assessing applications for retail, leisure and office development outside of town centre, which are not in accordance with an up-to-date Local Plan, local planning authorities should require an impact assessment if development is over a proportionate, locally set floorspace threshold (if there is no locally set threshold, the default threshold is 2,500 sq.m).'

9.7.4 The Ensuring the Vitality of Town Centres Planning Practice Guidance provides further clarification in respect of the impact test and the setting of local thresholds. Paragraph 13 of the Practice Guidance states that:

'The purpose of the test is to ensure that the impact over time (up to five years (ten for major schemes)) of certain out of centre and edge of centre proposals on existing town centres is not significantly adverse. The test relates to retail, office and leisure development (not all main town centre uses) which are not in accordance with an up to date Local Plan and outside of existing town centres. It is important that the impact is

⁴² With the exception (in accordance with paragraph 88 of the NPPF) of small scale rural office proposals and other small scale rural development.

assessed in relation to all town centres that may be affected, which are not necessarily just those closest to the proposal and may be in neighbouring authority areas.'

9.7.5 Paragraph 16 provides specific guidance in relation to floorspace thresholds and states:

'The impact test only applies to proposals exceeding 2,500 square metres gross of floorspace unless a different locally appropriate threshold is set by the local planning authority. In setting a locally appropriate threshold it will be important to consider the:

- **Scale of proposals relative to town centres**
- **The existing viability and vitality of town centres**
- **Cumulative effects of recent developments**
- **Whether local town centres are vulnerable**
- **Likely effects of development on any town centre strategy**
- **Impact on any other planned investment.'**

9.7.6 The current adopted Policy does not provide a locally set threshold for impact assessments, and instead refers to the national threshold of 2,500 sq.m.

9.7.7 We are of the view that the imposition of a blanket threshold is not appropriate across all types of centre within an administrative area. For example, a convenience store with a net sales area of 250 sq.m (which could be operated by, for example, Tesco Express or Sainsbury's Local) would have a significantly greater impact on a small centre than it would on a large town centre. Such stores generally have net sales areas slightly below the 280 sq.m net sales area limit for extended Sunday trading and generally have a gross floorspace approaching 400 sq.m. Whilst of a relatively moderate size, these convenience stores often have a relatively substantial turnover and it is considered necessary for the local planning authority to retain control in respect of the consideration of impacts arising from the implementation of such proposals. Therefore, in implementing a local threshold policy, it is considered more appropriate to apply a range of thresholds in accordance with the type of centre the proposed development is proximate to. The thresholds should not only apply to new floorspace, but also to changes of use and variations of condition to remove or amend restrictions on how units operate or trade in practice.

9.7.8 In terms of comparison goods units, it is often the case that the larger units in defined centres (similarly to the larger convenience goods units) provide space for key retailers which act as an 'anchor' to the centre, which attract shoppers in and result in 'spin-off' trade

to the rest of the centre. Should one of these anchor units or operators leave the centres, there is a real potential to have a significant detrimental impact on those centres.

- 9.7.9 Where there is genuine potential for an application proposal to divert a material level of expenditure away from a defined centre (i.e. a level which could result in a significant adverse impact on the vitality and viability of a centre), or potentially remove important tenants from that centre, then it will likely be necessary to consider the impacts arising from the proposal in detail. In this instance, we consider that there is a real potential for edge or out of centre comparison and convenience goods retail schemes to have a significant impact on the overall health of the defined centres within Chorley, and, therefore, we believe that a relatively low impact threshold should be applied to ensure that the Council retains appropriate control over such development.
- 9.7.10 We note that there are a relatively limited number of units greater than 500 sq.m in the town or district centres and we consider that a unit of such a scale could potentially accommodate an operator of importance to the future vitality and viability of the centres. Such units of this scale could therefore provide space for 'anchor' operators, which provide a key attraction to a centre and draw in shoppers, thus increasing the potential for 'linked-trips'.
- 9.7.11 Anchor units are considered to represent units of 500 sq.m and above in terms of convenience and comparison retailers and leisure uses. There are relatively few units of this size and to lose an occupier of that scale could have a significant adverse impact on the centres.
- 9.7.12 We note that there are a relatively limited number of units greater than 500 sq.m in Chorley town centre (less than 8% of the total stock of commercial units have a greater floorspace than this, which includes the large format convenience operators such as Asda and Booths and the Gala Bingo) and we consider that a unit of such a scale could potentially accommodate an operator of importance to the future vitality and viability of the town centre.
- 9.7.13 Furthermore, we also note that the threshold applies to individual application proposals and that it could be possible for an applicant to 'circumnavigate' the requirements of the test through the submission of multiple, small-scale applications which together would provide for a larger development. As such, we recommend that the impact threshold of relevance to Chorley town centre is set at 500 sq.m, for applications relating to both convenience and

comparison retail floorspace, which will also apply Borough wide, if the proposal does not fall within the specific additional threshold requirements for district centres as set out below.

- 9.7.14 This recommendation is reflective of the potential for existing nearby out of centre retail destinations to become even stronger in the future at the expense of the centre, particularly in light of the substantial extension proposed at Botany Bay and the new development at Cuerden.
- 9.7.15 Due to the smaller scale of the district centres, and the relatively modest size of most of their commercial units, we consider it appropriate for a lower impact threshold of 300 sq.m to apply to potential development proximate to these centres. This is in keeping with their more localised role and function but demonstrate the potential implications out of centre developments could have on these centres.
- 9.7.16 Furthermore, the district centres are typically anchored by a national multiple convenience store (typically a Co-op but also other named operators such as Asda, Morrisons and Tesco). These operators provide a key role for the district centres, bringing in shoppers and encouraging 'linked-trips'. Should a proposal come forward which could impact on the performance of these stores, there is a real risk of a significant adverse impact on the overall vitality and viability of the centres and as such, must be protected accordingly. There are relatively few units of this size within the district centres and to lose an occupier of that scale could have a significant adverse impact on the centres.
- 9.7.17 Accordingly, in the local context, 300 sq.m constitutes a substantial sized unit for both the town and district centres. The setting of a lower threshold for the district centres will ensure that schemes which have the potential to result in significant adverse impacts are appropriately assessed, in order that appropriate consideration is given to the town centres' vitality and viability in considering the acceptability of future development.
- 9.7.18 For the local centres within Chorley, it is recommended that a lower policy threshold of 200 sq.m (gross floorspace) applies. This lower threshold is set at a level which ensures that the impacts arising from proposed convenience stores operated by 'main four' food retailers (which can have a have a substantial seven-figure turnover) can be appropriately considered. We are aware of recent appeals where Inspectors have found that such convenience stores can have a significant adverse impact on smaller centres⁴³. We believe that this type of development has the potential to divert expenditure and potential operators

⁴³ Such cases include the appeal against the refusal of planning permission for a Tesco Express at Luton (PINS reference APP/B0230/A/13/2203864) and the appeal against the refusal of planning permission for a Sainsbury's Local (PINS reference APP/e59000/A/14/2217680) at Tower Hamlets

from the Borough's smaller centres and that the setting of lower thresholds is therefore justified.

- 9.7.19 We believe that the proposed lower thresholds for local centres are appropriate as a consequence of their localised role and function, and the fact the opening of a small format convenience store outside of these smaller centres is likely to directly compete with type of local needs provision typically found within such centres. We therefore believe it is reasonable for applicants proposing developments of 200 sq.m gross floorspace for local centres and above, to demonstrate that their proposal will not have a significant adverse impact on smaller centres sharing part of the same catchment.
- 9.7.20 The proposed thresholds at local centre level are considered to reflect the relatively small size of some of the centres at the lower end of the retail hierarchy and their consequent potential susceptibility to alternative 'out-of-centre' provision. In practice, it is envisaged that a proposal of just greater than 200 sq.m adjacent to a local centre would generally require an impact assessment of proportionate length (i.e. for development of such a scale, impact may on occasion be able to be dealt with as part of the covering letter accompanying the application). Where an application proposal is above the respective stated impact threshold, we would recommend that the applicant discusses and agrees the scope of the retail impact assessment with the Council prior to submission. The lower threshold of 200 sq.m for local centres is considered appropriate due to potential for convenience stores of even a relatively small nature could substantially impact upon the performance of existing operators, due to the potential higher sales densities of such proposals. This would ensure that particular protection of these smaller centres is considered appropriately.
- 9.7.21 We believe that it is appropriate to qualify the area to which each local impact threshold will apply. We recommend that the thresholds of relevance to the borough's district centres (i.e. the lower threshold of 300 sq.m) would be applicable within 800 metres of the boundary of the relevant centre. The distance of 800 metres is broadly commensurate with the potential walk-in catchments of smaller centres and is identified by Guidelines for Providing for Journeys on Foot (The Institution of Highways & Transportation, 2000) as being the 'preferred maximum' acceptable walking distance to a centre. We consider it to be appropriate for the higher threshold of 500 sq.m to apply Borough-wide (beyond 800 metres of these centres), due to the lesser likelihood of significant adverse impacts arising from retail, leisure and office development.



9.7.22 Based on the above, we are of the view that an impact assessment will be necessary for proposals (including the formation of mezzanine floors) for/or which include retail, leisure and office developments which are not located within a defined centre where:

- The proposal provides a floorspace greater than 500 sq.m gross; or
- The proposal is located within 800 metres of the boundary of District Centre and is greater than 300 sq.m gross; or
- The proposal is located within 800 metres of the boundary of a Local Centre and is greater than 200 sq.m gross.

9.7.23 In our experience, it will only generally be development of a scale greater than these thresholds which could lead to a 'significant adverse' impact, which could merit the refusal of an application for town centre uses in accordance with the provisions of paragraph 90 of the NPPF.

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.

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 15 (December 2017).
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.
Office Use	Defined in the Town and Country Planning (Use Classes) Order 1987 (as amended) as a use within Class B1.

Over/Under Trading	The level by which a retailer is performing compared to its national benchmark average. The turnover is calculated by multiplying the net sales area by the benchmark turnover taken from reputable sources as provided by the retailer itself.
Price Base	The price base for the Study is 2016.
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 city 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.