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Planning Design Economics

ROSSENDALE BOROUGH COUNCIL

RETAIL AND TOWN CENTRE STUDY UPDATE 2009

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CONTENTS

APPENDICES

1.0 INTRODUCTION

The Study

1.1 Nathaniel Lichfield & Partners (NLP) was commissioned by the Rossendale Borough Council (RBC) to prepare a Retail and Town Centre Study (RTCS) in 2005, which was completed in May of that year. The Study included an analysis of the four main centres in Rossendale, namely Rawtenstall, Bacup, Haslingden and Waterfoot, together with the four local centres of Whitworth, Crawshawbooth, Edenfield and Stacksteads, an assessment of the need and capacity for new convenience, comparison and leisure floorspace, and future potential development sites.

1.2 This Study provides an update of the 2005 RTCS and forms a stand-alone report which replaces the previous Study. Specifically, it updates the retail capacity assessment based on the latest available information, e.g. population, expenditure and turnover levels, and has been informed by a new household survey. This Study reflects the significant changes that have occurred in the retail landscape since the 2005 RTCS was undertaken, particularly with regard to convenience goods provision in the Borough. It also updates the defined centre health checks, potential development sites and policy position.

1.3 Importantly this update forms part of the evidence base for the Rossendale Local Development Framework. It has been prepared in accordance with PPS6 'Planning for Town Centres' and takes account of the latest regional planning policy framework. As part of the LDF evidence base it will inform the Council's spatial approach to planning for town centres and retailing in Rossendale to 2024.

1.4 The Study fulfils the following objectives which were set out in the initial planning brief:

- In line with paragraph 2.17 of PPS6, identifies and defines the extent of the primary shopping areas for the centres within Rossendale taking into account primary and secondary frontages. The need for any extension or contraction has been considered;
- Determines the nature of and reason for retail pressures;
- Enables the Council to both establish and project the demand for future retail provision to 2024;
- Provides information on other town centre uses;

- Provides robust information on retail data such as consumer spending, shopping catchment areas and retail floorspace;

- Provides information to enable Local Development Framework preparation;

- Identifies areas of the Borough where there is an over-supply of retail floorspace and where capacity exists for additional retail floorspace;

- Takes account of existing and future shopping patterns given the need for a more sustainable pattern of travel provision;

- Fulfils the objectives outlined in PPS6 at paragraph 2.16;

- Takes account of the adopted RSS (North West Plan);

- Examines the implications of Draft PPS4.

2.0 PLANNING POLICY CONTEXT

National Policy

2.1 This section of the report sets out the national, regional, structure and local planning policy guidance relevant to this Study.

National Planning Guidance

PPS6: Planning for Town Centres (March 2005)

2.2 This Statement sets out the Government's policies on town centres, retail, commercial leisure and other town centre uses.

2.3 The Government's key objective for town centres (this covers city, town, district and local centres) is to promote their vitality and viability by planning for growth and development of existing centres and promoting and enhancing existing centres, by focusing development in such centres and encouraging a wide range of services in a good environment, accessible to all.

2.4 Other Government objectives that need to be taken into account, in the context of the key objective, are set out in paragraph 1.4 of PPS6:

- Enhancing consumer choice by making provision for a range of shopping, leisure and local services, which allow genuine choice to meet the needs of the entire community and particularly socially excluded groups;
- Supporting efficient, competitive and innovative retail, leisure, tourism and other sectors, with improving productivity; and
- Improving accessibility, ensuring that existing or new development is, or will be, accessible and well served by a choice of means of transport.

2.5 Regional planning bodies (RPB's) and local planning authorities (LPAs) are advised in paragraph 1.6 to implement the Government's objectives for town centres, by planning positively for their growth and development. They should therefore:

- Develop a hierarchy and network of centres;
- Assess the need for further main town centre uses and ensure there is capacity to accommodate them;

- Focus development in, and plan for the expansion of, existing centres as appropriate, and at the local level identify appropriate sites in development plan documents;

- Promote town centre management, creating partnerships to develop, improve and maintain the town centre and manage the evening and night-time economy; and

- Regularly monitor and review the impact and effectiveness of their policies for promoting vital and viable town centres.

2.6 Paragraph 2.1 states that in order to deliver the Government's key objective, RPB's and LPA's should actively promote growth and manage change in town centres, define the network and a hierarchy of centres, each performing their appropriate role to meet the needs of their catchment, and adopt a pro-active, plan-led approach to planning for town centres, through regional and local planning.

2.7 The main town centre uses to which PPS6 applies are outlined in paragraph 1.8:

- Retail (including warehouse clubs and factory outlet centres);

- Leisure, entertainment facilities and the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, night-clubs, casinos, health and fitness centres, indoor bowling centres and bingo halls);

- Offices, both commercial and those of public bodies; and

- Arts, culture and tourism (theatres, museums, galleries and concert halls, hotels and conference facilities).

2.8 Paragraph 1.9 of PPS6 also acknowledges that housing will be an important element in most mixed-use, multi-storey developments.

2.9 PPS6, paragraphs 2.15 to 2.17 offers specific guidance to LPA's on the role of plans at a local level, including the need to work in conjunction with stakeholders and the community to:

- Assess the need for new floorspace for retail, leisure and other main town centre uses, taking account of both quantitative and qualitative considerations;

- Identify deficiencies in provision, assess the capacity of existing centres to accommodate new development, including, where appropriate, the scope for extending the primary shopping area and/or town centre, and identify centres in decline where change needs to be managed;

- Identify the centres within their area where development will be focused, as well as the need for any new centres of local importance, and develop strategies for developing and strengthening centres within their area;

- Define the extent of the primary shopping area and the town centre, for the centres in their area on their Proposals Map;

- Identify and allocate sites in accordance with the considerations on site selection and land assembly e.g. assessment of need, appropriate scale of development, sequential approach, impact and accessibility (set out in para. 2.28-2.51 of PPS6);

- Review all existing allocations and reallocate sites which do not comply with PPS6;

- Develop spatial policies and proposals to promote and secure investment in deprived areas by strengthening and/or identifying opportunities for growth of existing centres, and to seek to improve access to local facilities; and

- Set out criteria based policies, in accordance with PPS6, for assessing and locating new development proposals, including development on sites not allocated in development plan documents.

2.10 PPS6 also indicates that:

> *"In addition to defining the extent of the primary shopping area for their local centres, LPA's may distinguish between primary and secondary frontages. These frontages should be realistically defined. Having regard to the need to encourage diversification of uses in town centres as a whole, primary frontages should contain a high proportion of retail uses, while secondary frontages provide greater opportunities for flexibility and diversity of uses. Where frontages are identified the appropriate local development documents should includes policies that make clear which uses will be permitted in such locations."*
>
> (Para.2.17, PPS6)

2.11 PPS6 requires Councils to undertake assessments of need for other non-retail town centre uses, i.e. commercial leisure and office development. PPS6 states in paragraph 2.33 that:

> *'In assessing the need and capacity for additional retail and leisure development, local planning authorities should place greater weight on quantitative need for additional floorspace for the specific types of retail and leisure developments. However local planning authorities should also take account of qualitative considerations. In deprived areas which lack access to a range of services and facilities, there will be clear and demonstrable benefits in identifying sites for appropriate development to serve the communities in these areas, additional weight should be given to meeting these qualitative considerations'.*

2.12 In assessing quantitative need for additional development, local planning authorities should assess the likely future demand for additional retail and leisure floorspace, having regard to a realistic assessment of the existing forecast population levels, forecast expenditure for specific classes of goods to be sold, within the broad categories of comparison and convenience goods and for main leisure sectors and forecast improvements in productivity in the use of floorspace.

2.13 With regard to assessing the qualitative need for additional development, paragraph 2.35 states:

> *"In assessing the qualitative need for additional development when preparing its development plan documents, a key consideration for a LPA will be to provide for consumer choice, by ensuring that:*
>
> - *an appropriate distribution of locations is achieved, subject to the key objective of promoting the vitality and viability of town centres and the application of the sequential approach, to improve accessibility for the whole community; and*
>
> - *provision is made for a range of sites for shopping, leisure and local services, which allow genuine choice to meet the needs of the whole community, particularly the needs of those living in deprived areas."*

2.14 Other local issues, although not necessarily elements of *'need',* can be important material considerations.

2.15 PPS6 also requires that local planning authorities ensure that the scale of opportunities identified is directly related to the role and function of the centre and its catchment. Paragraph 2.41 states:

> *"The aim should be to locate the appropriate type and scale of development in the right type of centre, to ensure that is fits into that centre and that it complements its role and function."*

2.16 For city and town centres, PPS6, paragraph 2.43 states that where a need has been identified, LPA's should seek to identify sites in the centre, or failing that on the edge of the centre, capable of accommodating larger format developments. Paragraph 2.42 indicates that in most cases it is likely to be inappropriate to include local centres within the search area to be applied under the sequential approach for large scale developments.

2.17 The guidance places greater emphasis on the regeneration of town centres, particularly smaller centres and the need to define a network of centres, and where appropriate to plan for the decline of some centres. Local authorities are expected to set indicative upper limits on the scale of new floorspace appropriate in different types of centres.

2.18 PPS6 sets out the sequential approach to site selection for new retail development (paragraph 2.44), namely that first preference should be existing centres where suitable sites or buildings for conversion are, or are likely to become available, taking account of an appropriate scale of development in relation to the role and function of the centre, followed by edge-of-centre locations, with preference given to sites that are or will be well-connected to the centre. Only then out-of-centre sites should be considered, with preference given to sites which are or will be well served by a choice of means of transport and which are close to the centre and have a high likelihood of forming links with the centre.

2.19 Further to this LPA's should, in consultation with stakeholders (including the development industry) and the community, identify an appropriate range of sites to allow for accommodation of the identified need. Paragraph 2.45 emphasises the need for flexibility and realism from both LPA's and developers and operators in discussing the identification of sites,

> *"LPA's should be sensitive to the needs of the community and stakeholders, including developers and operators and identify sites that are, or are likely to become available for development during the development plan document period and which allow for the accommodation of the identified need, including sites capable of accommodating a range of business models."*

2.20 The factors that should be taken into account in considering business models are scale, format, car park provision and the scope for disaggregation.

2.21 In selecting sites for allocation, the LPA should also consider the degree to which other considerations, including specific local circumstances, may be material to the choice of appropriate locations for development, and these include physical regeneration, employment, economic growth and social inclusion.

2.22 The guidance clearly states that local planning authorities should plan positively for growth by making provision for a range and choice of shopping and services. If a 'need' for new development is established, it will be necessary to identify opportunities to meet that need. PPS6 indicates that local authorities should allocate sufficient sites to meet anticipated demand for the next five years. PPS6 also suggests that an apparent lack of sites of the right size and in the right location should not be construed as an obstacle to site allocation and development to meet this need. Local planning authorities should consider the scope for effective site assembly using their compulsory purchase order (CPO) powers, to ensure that suitable sites within or on the edge of centres are brought forward for development.

2.23 This suggests the onus is placed on the Council to identify sites to accommodate the 5-year demand for development. This study provides floorspace projections up to 2024. Therefore, we do not consider that it is appropriate for the Council to seek to identify opportunities to accommodate projections up to 2024 at this stage.

2.24 PPS6 also suggests that where growth cannot be accommodated in identified existing centres, local planning authorities should plan for the extension of the primary shopping area if there is a need for additional retail provision or, where appropriate, plan for the extension of the town centre to accommodate other main town centre uses. Extension of the primary shopping area or town centre may also be appropriate where a need for large developments has been identified and this cannot be accommodated within the centre. Larger stores may deliver benefits for consumers and local planning authorities should seek to make provision for them in this context. In such cases, local planning authorities should seek to identify, designate and assemble larger sites adjoining the primary shopping area (i.e. in edge-of-centre locations).

Draft PPS4: Planning for Prosperous Economies (May 2009)

2.25 On 5th May 2009, the Department for Communities and Local Government published a consultation paper on a new PPS4: Planning for Prosperous Economies. This incorporates the town centre and retail policy statements contained in PPS6 and the policies on economic development in urban and rural areas in PPG4, PPG5 and PPS7 into a single PPS. The aim of the document is "to make planning policies clearer, more concise, more businesslike and easier to use" and brings together all the Government's key planning policies relating to the economy.

2.26 The long awaited Good Practice Guide on need, impact and the sequential approach has been published alongside PPS4 as a "living draft" to help practitioners implement its policies. PPS4 places retail and other town centre development in a wider context, as "economic development" which provides employment, generates wealth and/or economic growth. This brief summary and comment deals with the retail and town centre elements of PPS4 only.

2.27 There is no fundamental change to the approach previously consulted on in July 2008 in the Proposed Changes to PPS6.

2.28 There remains considerable emphasis on the plan-led approach and the "town centres first" policy. The roles and responsibilities for regional planning bodies and local planning authorities in preparing the evidence base that will underpin development plan policy are clearly specified. Regional planning bodies will focus on the requirements for comparison retail, leisure and office uses, and must define a network and hierarchy of higher level centres.

2.29 New requirements for local planning authorities include the need to:

- Identify deficiencies in floorspace provision, including the provision of local convenience shopping and other facilities which serve day-to-day needs;

- Define the network and hierarchy of lower order centres and set out a spatial vision and strategy for the management and growth of centres in their Core Strategy;

- Consider setting thresholds for the scale of edge-of-centre and out-of-centre development which should be the subject of an impact assessment, specify the areas where this will apply and the types of impacts having particular local importance; and

- Prepare policies for the scale of development likely to be permissible in different centres.

2.30 The draft PPS4 proposes the removal of the need test when determining planning applications. The two key tests for applications are therefore the expanded impact test and the sequential approach. The assessment of each should be proportionate to the scale and nature of proposals and their likely impact.

2.31 The sequential approach remains largely unchanged from the July 2008 draft PPS6 changes. There is no additional clarification on the test, for example on the ambiguity between operators' business models and the need to consider the scope for disaggregation, however the Guide explains how this *"tension"* should be assessed.

2.32 Impact assessments are to consider positive and negative impacts, including cumulative effects. Eight "*key impacts*" are defined to assess proposals:

a) *"whether the proposal has been planned over the lifetime of the development to limit carbon dioxide emissions, and minimise vulnerability and provide resilience to, climate change*

b) *if located in an edge-of-centre location, the impact on the spatial planning strategy, in particular the role of the centre in the hierarchy of centres*

c) *what the impact is on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal*

d) *if a proposal is in or on the edge of a town centre, whether it is of an appropriate scale (in terms of gross floorspace), in relation to the size and role of the centre and its catchment area*

e) *the accessibility of the proposal by a choice of means of transport including walking, cycling, public transport and the car, the extent to which it will reduce or increase the overall distance travelled by car and the resultant effect on carbon dioxide emissions, the effect on local traffic levels and congestion (especially to the trunk road network) after public transport and traffic management measures have been secured, and the extent to which the location of the proposal will promote linked trips with existing centres*

f) *in the context of a retail or leisure proposal, what the impact is on in-centre trade/turnover and on trade in the wider area, taking account of current and future consumer expenditure capacity in the catchment area up to five years from the time the application is made, and, where applicable, on the rural economy*

g) *what the impact is on town centre vitality and viability, including local consumer choice and the range and quality of the comparison and convenience retail offer*

h) *whether the proposal secures a high quality and inclusive design which takes the opportunities available for improving the character and quality of the area and the way it functions"*

2.33 In terms of planning decision making, unless the local planning authority has identified locally important impacts in its development plan, it must also consider impact on allocated sites outside centres, deprived areas and social inclusion objectives, local employment and economic and physical regeneration.

2.34 Where there is clear evidence that a proposal is likely to lead to a significant adverse impact in relation to any of the "key impacts", the recommendation is that the application be refused. Conversely, proposals should be considered favourably where any adverse impacts are likely to be outweighed by their significant wider economic, social and environmental benefits.

2.35 Overall, the proposed policy revision and guidance does not signal any major change in direction. It should help to address some of the unintended consequences of PPS6, particularly through the removal of the need test, and it should ensure that the focus in the future will be the impact of proposals in social, economic and environmental terms.

2.36 It will probably be of most significance in areas where there is no identified need and to development which would deliver significant wider regeneration benefits.

Planning Policy Guidance Note 13: Transport (PPG 13, March 2001)

2.37 The key objectives, set out at paragraph 4 of PPG13 are to integrate planning and transport, in order to:

- *"promote more sustainable transport choices for both people and for moving freight;*
- *promote accessibility to jobs, shopping, leisure facilities and services by public transport; and*
- *reduce the need to travel, especially by car."*

2.38 The Guidance advises that planning policies should seek to promote the vitality and viability of existing town centres, which should be the preferred locations for new retail and leisure developments. When this development cannot be accommodated in or on the edge of existing centres, it may be appropriate to combine the proposal with existing out-of-centre developments.

Regional Planning Policy

North West of England Plan: Regional Spatial Strategy to 2021 (September 2008)

2.39 The recently published North West of England Plan provides the Regional Spatial Strategy for the North West. It replaces RPG13: Regional Planning Guidance for the North West (May 2003) which was the statutory regional planning document at the time of the previous study.

2.40 Policy W5 is entitled 'Retail Development' and states that:

"Plans and strategies should promote retail investment where it assists in the regeneration and economic growth of the North West's town and city centres. In considering proposals and schemes any investment made should be consistent with the scale and function of the centre, should not undermine the vitality and viability of any other centre or result in the creation of unsustainable shopping patterns".

2.41 Policy W5 continues by indentifying a number of centres within which comparison retailing facilities in particular should be encouraged, although this does not identify any centres within Rossendale. In terms of centres not identified, Policy W5 states that:

"Investment, of an appropriate scale…will be encouraged in order to maintain and enhance their vitality and viability, including investment to underpin wider regeneration initiatives, to ensure that centres meet the needs of the local community, as identified by Local Authorities".

2.42 The Policy continues by stating that:

"Retail development that supports entrepreneurship, particularly increasing the number of independent retailers, should be supported.

There will be a presumption against new out-of-centre regional or sub-regional comparison retailing facilities requiring Local Authorities to be pro-active in identifying and creating opportunities for development within town centres. There should also be a presumption against large-scale extensions to such facilities unless they are fully justified in line with the sequential approach established in PPS6. There is no justification for such facilities to be designated as town centres within plans and strategies".

2.43 In terms of committed retail development, the supporting text to Policy W5 notes at para 6.25 that although some historic commitments may not necessarily be implemented, and some do not support the 'town centres first' approach, local authorities should monitor the scale of retail development permitted as part of their needs assessment and consider how this can contribute towards meeting identified need.

2.44 In terms of leisure, para 6.27 notes that more regionally specific guidance on such development in town centres will be prepared by the Regional Planning Body as part of a future review.

Structure Plan

2.45 Since the 2005 study, the Lancashire Structure Plan (February 1997) has ceased to be part of the development plan, and following the adoption of the RSS in September

2008 the Joint Lancashire Structure Plan (March 2005) is no longer the statutory planning document, with the exception of Policy 29 'Sites for Gypsy and Traveller Families' which has been saved by the Secretary of State until the completion of the Partial Review of the RSS. Consequently, there is no longer any guidance at County level that is of relevance to retailing in the Borough.

Local Plan: The Rossendale District Local Plan 1995 (as saved)

2.46 Following the Planning and Compulsory Purchase Act (2004) the policies contained within the Rossendale District Local Plan were saved for three years until September 2007. In line with the legislation, and with Government Office's approval, the Council has chosen to save specific policies beyond this period until they are replaced by policies in the Local Development Framework. None of the shopping or town centre policies previously contained in the adopted plan has been saved.

2.47 Policy J5 'Tourism' has been saved, which encourages the improvement of existing tourist facilities and the development of new accommodation and attractions in appropriate locations.

Rossendale Alive: Sustainable Community Strategy

2.48 The 'Rossendale Alive' Sustainable Community Strategy was published in 2008 by the Rossendale Partnership, which is the Local Strategic Partnership for Rossendale bringing together various public, private, community, voluntary and faith sectors. It forms an overarching strategy for Rossendale over the 2008 to 2018 period and provides a vision of what the Borough will be like in 2018. The vision states that:

> *"By 2018, Rossendale will have strong communities with an enhanced environment and heritage. It will be an attractive place to live where tourists visit and employers invest."*

2.49 It focuses on the issues of people, places and prosperity. The overarching principles which it aims to achieve by 2018 are: reducing inequalities; community engagement and development; and community cohesion.

The Local Development Framework (LDF)

2.50 The Council is in the process of preparing the LDF which will replace the saved policies of the Rossendale District Local Plan and will cover the period to 2024.

2.51 The Core Strategy Preferred Options Report was published for consultation in March 2006. The final version of the Core Strategy which will be submitted to the Secretary of State is expected to be published in March 2010. Although this vision and the proposed policy responses have yet to be adopted, and therefore could change in the finalised document, they provide an insight into the likely direction that future policy will take.

2.52 Proposed Policy Response DS1: Hierarchy of Towns of the Core Strategy Preferred Options Report defines a retail hierarchy with Rawtenstall, Haslingden and Bacup as Key Service Centres and Whitworth as a Local Service Centre.

2.53 Proposed Policy Response DS3 identifies a number of Regeneration Priority Areas which include 'Rawtenstall Town Centre' and 'Bacup, Stacksteads and Britannia (ELEVATE) Pathfinder'.

2.54 Proposed Policy Response W4: Town Centres states that:

> *"Opportunities should be sought to maintain, protect or enhance the vitality and viability of all town centres, particularly in the Regeneration Priority Areas. Retail premises should be retained for retail purposes unless there is evidence that the premises are not required for retail purposes then opportunities should be sought for their use as other town centre or community uses".*

2.55 The Rawtenstall Town Centre Area Action Plan will identify alternative development options for the future of Rawtenstall Town Centre. It aims to assist regeneration in the Town Centre through the articulation of a long term vision for the future. The Rawtenstall Town Centre Preferred Options Report and the Rossendale Core Strategy and Rawtenstall Area Action Plan Preferred Options Addendum Report were published in March 2006 and October 2006 respectively.

2.56 The overall vision promoted for Rawtenstall is, as confirmed on page 14 of the Rawtenstall Area Action Plan Preferred Options Addendum Report, is that:

> *"Rawtenstall will be developed as Rossendale's principal town centre, fulfilling its role as a Gateway to the Sub-Region, County and Borough, attracting and meeting the needs of a wide range of residents, visitors, workers and investors, providing a self sustaining mix of uses in a well designed, focused and integrated centre, building upon and strengthening its unique character and sense of place, with excellent connections by all modes of transport in a safe, accessible and well maintained environment".*

2.57 Four alternative spatial strategies are proposed to guide future development in Rawtenstall. These comprise:

- Option 1 – Piecemeal Development. The centre develops through individual development proposals brought forward in an ad hoc, uncoordinated fashion.

- Option 2 – Focus on High Street Retail Quarter. This option seeks to secure the redevelopment of the Valley Centre and focus investment in the retail heart of the town. The main road infrastructure would remain largely unaltered, with capacity increased on the Queen's Square gyratory and enhanced pedestrian crossings. Peripheral sites including the Tesco on Bocholt Way, Low Mill and New Hall Hey would remain edge-of-centre and closer integration with the rest of the town centre would not be actively pursued.

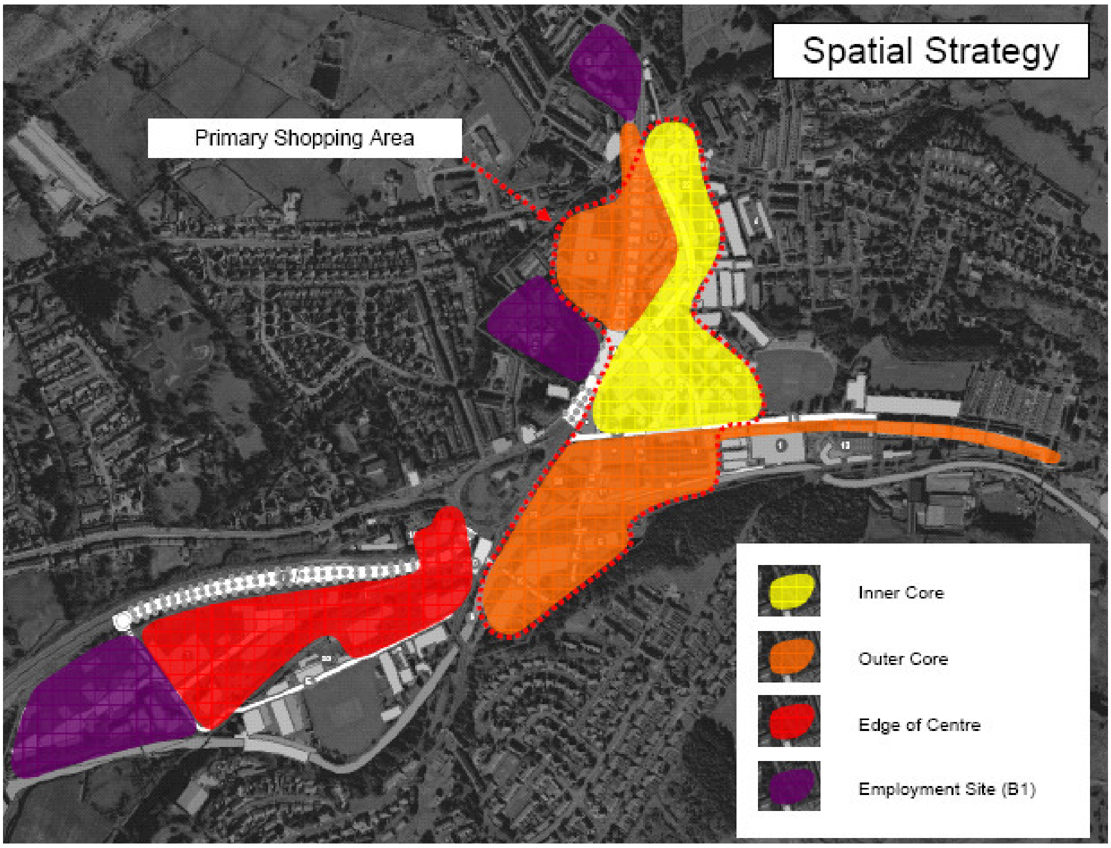
- Option 3 – Integrate Whole Town Centre. This option would radically remodel the existing road infrastructure to integrate all elements of the town centre which would include New Hall Hey. The retail heart would be a focus for regeneration and Queen's Square pedestrian orientated to provide an extension to the centre core.

- Option 4 – Integrate Town Centre Retaining Gyratory (from Revised Preferred Option Report). This option essentially combines elements of Options 2 and 3. It would actively support the regeneration of the town centre, including the Valley Centre together with new civic facilities potentially including council offices, a community/cultural venue and a police station. Gyratory capacity would be increased and enhanced pedestrian crossings provided, with Bacup Road incorporating traffic calming measures. Environmental enhancements would also be made.

2.58 Following testing against the vision for Rawtenstall, Option 4 emerges as the Preferred Option for the Rawtenstall Area Action Plan (AAP). Although Option 3 is noted as performing well against many of the criteria and better than Option 4 in terms of urban design, it fails on the basis of insufficient highway capacity.

2.59 The Preferred Options for the Rawtenstall AAP defines a 'Primary Shopping Area'. This area is split into an 'Inner Core' and an 'Outer Core'. This is shown in Figure 2.1 below.

Figure 2.1 Proposed Primary Shopping Area defined in the Rawtenstall AAP



Source: Rawtenstall Area Action Plan Revised Preferred Options (March 2006)

2.60 The 'Inner Core' comprises Bank Street, Kay Street, North Street, Lord Street, James Street, Buller Street and Annie Street, and includes the Valley Centre, the Council offices, the police station and Rawtenstall Market. The 'Outer Core' incorporates two separate areas; one extends to the west of the 'Inner Core' to include the area of land to the rear of Bank Street and the Asda foodstore and the adjacent car parking facilities on St Marys Way; the other extends to the south of the 'Inner Core' to include Bacup Road, including the Focus store and the former bus depot, and extends as far south as the Tesco foodstore on Bocholt Way. An 'edge of centre' area is also defined outside of the Primary Shopping Area, which is located to the south-west of Rawtenstall and encompasses the New Hall Hey site. The supporting text indicates that the 'Inner Core Area' comprises the Primary Shopping Frontage and the 'Outer Core Area' forms the Secondary Shopping Frontage.

2.61 The shopping frontage definitions contained within the Preferred Options AAP have been considered in relation to the definition of the primary shopping area within this Study. It is important that the LDF documents accord with the guidance on defined shopping frontages within PPS6. Revisions to these boundaries are being proposed by this Study. Please refer to Chapter 8 for more information.

2.62 The ‘Bacup, Stacksteads and Britannia Area Action Plan’ Issues and Options Report was published for consultation in July 2005. Although this document focuses on housing provision within the area, it identifies three sites in the town centre for future regeneration. These comprise: Market Street/Burnley Road, the existing town centre area and the area located to the south of the town centre

2.63 The Market Street/Burnley Road site is identified as being suitable for:

> *“…a key landmark mixed use redevelopment which could incorporate a ‘Community Hub’ including restaurant / leisure uses and small scale offices on 2-3 levels. There is also an opportunity to consider a new leisure centre on the site which would enable the existing leisure centre in North Bacup to be redeveloped”.* (Chapter 8.0, page 110)

2.64 In terms of the existing town centre area, the document emphasises the important role of Bacup Town Centre in the provision of retail facilities to residents. It notes that:

> *‘There is an opportunity to consolidate the retail offer by focussing it along key streets and seeking alternative uses for vacant or underutilised properties which are located at the periphery of the town centre. A broader range of shops could encourage more people to visit the area.*
>
> *The enhancement of the heritage value of the town centre would attract more tourists.’* (Chapter 8.0, page 111)

2.65 The large site identified as the ‘area located to the south of the town centre’ is deemed to be suitable for a range of uses include residential, retail (including potential relocation of the existing market), employment, open space and offices, and potentially a new transport hub and car parking facilities.

3.0 HOUSEHOLD SURVEY

Introduction

3.1 In order to inform this update, NEMS Market Research was commissioned to carry out a telephone survey of 800 households in the Rossendale study area. These were undertaken between November and December 2008. The study area was split into four survey zones based on postcode sectors which were identical to those used in the 2005 study. A plan of the study area is included in this report at Appendix A.

3.2 This section provides both a summary of the 2008 Household Survey and a comparison of the shopping patterns identified within the earlier 2004 Household Survey. The household survey results are shown at Appendix B with detailed household survey analysis is contained at Appendix C.

Food and Grocery Shopping

Main Food Shopping

3.3 The 2008 household survey reflects the influence of the new large-format convenience foodstores that have been developed in the Borough since the 2004 household survey (i.e. the Tesco stores in Rawtenstall and Syke Side and the relocated Asda store in Rawtenstall). These stores have increased retention of main food shopping expenditure within Rossendale. The relative market share of the Asda has declined compared to the previous household survey (despite its relocation to a larger unit) reflecting the increased competition from the Tesco stores, which have widened the choice of main food shopping destinations in the Borough.

Top-Up Food Shopping

3.4 83% of respondents indicate that they undertake shopping for top-up goods in addition to their main food shopping trips. In general terms, top-up food shopping patterns show a greater degree of dispersion across convenience facilities compared to main food shopping trips. Destinations within Rossendale attract the majority of shopping trips in the Haslingden, Rawtenstall/Waterfoot and Bacup zones, and these destinations have increased their market share since the 2004 household survey.

Conversely, top-up food shopping patterns in the Ramsbottom zone were predominantly directed to destinations outside of the Borough.

Non-Food Shopping

3.5 In the study area as a whole, the majority of non-food shopping trips generated by residents are directed to facilities situated outside of Rossendale, although within the Borough Rawtenstall is the most popular destination for such activities (with 15% of all trips). The destinations for leaked non-food shopping trips occurring beyond Rossendale varies across the survey zones, although Bury is the overall most popular destination achieving a market share of 19%, followed by Accrington (12%).

3.6 In terms of individual non-food shopping categories these are broken down in detail at Appendix C. A summary of the main results recorded is as follows:

- Retention of clothing and footwear expenditure in the Borough is poor, with only Rawtenstall recording any meaningful market share in any zones. Expenditure takes place mainly in Bury and Manchester;

- Shopping trips to purchase domestic electrical appliances are made by residents to a variety of destinations in Rossendale and retention is higher than for clothing and footwear shopping, but still low compared to other types of comparison goods. Bury is the most popular destination for such shopping trips overall. The growing importance of internet/ mail order/ catalogue shopping trips in 2008 compared to 2004 is apparent reflecting national trends;

- With regard to other (non domestic) electrical goods shopping destinations, Rawtenstall and Haslingden both record reasonable market shares, although the majority of trips are directed to facilities outside of Rossendale, in particular Bury and Blackburn. Internet/ mail order/ catalogue has significantly increased its market share since 2004;

- All of the four main centres in Rossendale attract some expenditure for furniture, soft furnishings and floor-coverings, although in all survey zones the majority of trips are directed to destinations outside the Borough;

- In terms of shopping trips for DIY/hardware and garden items, the retention of shopping trips by destinations in Rossendale is relatively high (predominately reflecting the presence of the Focus in Rawtenstall) compared to other types of goods in the Haslingden, Rawtenstall/ Waterfoot and Bacup zones;

- Retention of expenditure for chemist, health and beauty items by facilities in Rossendale is high, with a market share of well over half in the Rawtenstall/ Waterfoot and Bacup zones, and is higher overall than for any other type of comparison goods. Shopping trips are directed to a variety of destinations in the Borough including town centres, local centres and supermarkets;

- 'Other non-food items' include such goods as books, CD's, toys and gifts. A reasonable proportion of expenditure for such items are retained by facilities in Rossendale, although this remains lower than for other types of comparison goods and only Rawtenstall and Haslingden record any significant market shares.

Markets

3.7 The household survey specifically probed residents' use of markets both within Rossendale and outside of it. Most residents surveyed undertake shopping trips to markets at some point for either food or non-food goods. The most popular markets were found to be Bury, Rawtenstall and Accrington.

3.8 Residents were asked what measures would encourage them to frequent markets on a more regular basis. Although most stated that there was 'nothing' that could be done, the most popular measures to encourage residents to use markets more often are more stalls and a better range of food and non-food goods.

Town Centre Improvements

3.9 The household survey asked specific questions concerning what measures would make them shop in the four main centres in Rossendale, together with Whitworth, more frequently. In Rawtenstall, Bacup, Haslingden and Waterfoot a 'better choice of non-food shops' is recorded as being the most popular responses, whilst in Whitworth a 'better choice of food shops' was the most popular response to encourage more frequent use. However, in all cases the most popular response is that there is nothing that could be done to encourage them to use the centres more often.

Leisure Activities

3.10 The summary of the leisure market shares recorded in Appendix C is as follows:

- Approximately half of residents surveyed visit the cinema. Given the lack of provision in the Rossendale all of these trips were directed to destinations outside the Borough with the most popular locations being Bury, Burnley and Accrington;
- Some 44% of respondents visit the theatre. Most trips are directed to destinations outside of Rossendale, although Bacup records a reasonable market share in the Haslingden, Rawtenstall/ Waterfoot and Bacup zones reflecting good local provision;

- In terms of pubs and bars for drinking, facilities in the Borough record a reasonable market share reflecting residents' reluctance to travel long distances. A range of smaller centres in the Borough record modest market shares;

- Visiting a pub/restaurant to eat is the most popular leisure activity overall, with 80% of residents undertaking this leisure activity. Destinations in Rossendale perform well in this category, with the most popular destinations being within Rawtenstall and Haslingden;

- The overwhelming majority of trips to visit nightclubs are directed to destinations outside of the Borough, and in particular Manchester which records a 57% market share;

- Bingo is the least popular leisure activity undertaken by only 4% of respondents. Burnley attained the greatest market share in terms of this leisure activity;

- In general terms, residents who undertake health and fitness related activities tend to visit facilities located within close proximity to them. A variety of destinations in Rossendale attract health and fitness trips, with Haslingden achieving the greatest market share of any destination;

- All trips made by residents for tenpin bowling destinations were outside Rossendale given the lack of provision in the Borough. Overall, Bury was the most popular destination;

- 38% of respondents indicated that they go swimming. Over half of trips are to facilities in Rossendale accounted for by facilities at Marls Pits (16%), Haslingden (12%) and Whitworth (10%);

- Half of the respondents used sports centre facilities in the Borough with Haslingden being the most popular destination overall, with 36% of such trips.

Conclusions

3.11 The key findings of the Household Survey are as follows:

- There has been considerable change in main food shopping patterns in the survey area since 2004, due to the opening of new Asda and Tesco stores in Rawtenstall and the Tesco at Syke Side, Haslingden. Asda remains the most popular main food shopping destination in the Borough, but has a reduced market share, despite its relocation to a new store, reflecting the increased competition.

- 83% of respondents undertake top-up shopping trips in between their main food shopping trips. These are directed to a wide variety of shopping destinations, predominately within the Borough.

- In terms of overall non-food shopping trips, a significant proportion of expenditure leaks outside the Borough (although Rawtenstall is second most popular destination). Bury is the most popular destination by residents in the

Borough overall with Accrington also popular. The most popular destination for individual types of non-food goods varied across each zone and according to the particular category of goods.

- When respondents were asked to consider what would make them frequent the markets in Rossendale more regularly, the most popular response in relation to all three markets (other than ‘nothing’) was the provision of more stalls.

- The most popular measures that would encourage residents to use existing defined centres in the Borough more often are a better choice of food and non-food shops, better quality shops and more car parking.

- The most popular leisure activity which respondents indicated that they undertake is visiting pubs or restaurants for food, with the least popular being bingo. Participation rates and facility usage vary across the survey zones and between leisure activities.

4.0 VITALITY AND VIABILITY HEALTH-CHECK UPDATES

Introduction

4.1 The 2005 RTCS provides a comprehensive assessment of the health of the four main town centres and four of the local centres in the Borough. This Study has revisited the centres to provide an update on their vitality and viability on the basis of the health check indicators contained in PPS6. It should also be reiterated that none of the town centre boundaries contained in the Rossendale District Local Plan has been saved.

4.2 The health checks are informed by the following indicators which are derived from PPS6 (para 4.4, PPS6):

- **diversity of main town centre uses (by number, type and amount of floorspace)**: the amount of space in use for different functions – such as offices; shopping; leisure, cultural and entertainment activities; pubs, cafes and restaurants; and, hotels;

- **the amount of retail, leisure and office floorspace in edge-of-centre and out-of-centre locations**;

- **the potential capacity for growth or change of centres in the network**: opportunities for centres to expand or consolidate, typically measured in the amount of land available for new or more intensive forms of town centre development;

- **retailer representation and intentions to change representation**: existence and changes in representation of types of retailer, including street markets, and the demand of retailers wanting to come into the centre, or to change their representation in the centre, or to reduce or close their representation;

- **shopping rents**: pattern of movement in Zone A rents within primary shopping areas (ie. the rental value for the first 6 metres depth of floorspace in retail units from the shop window);

- **proportion of vacant street level property**: vacancies can arise even in the strongest town centres, and this indicator must be used with care. Vacancies in secondary frontages and changes to other uses will also be useful indicators;

- **commercial yields on non-domestic property (ie the capital value in relation to the expected market rental)**: demonstrates the confidence of investors in the long-term profitability of the centre for retail, office and other commercial developments. This indicator should be used with care;

- **pedestrian flows (footfall)**: a key indicator of the vitality of shopping streets, measured by the numbers and movement of people on the streets, in different parts of the centre at different times of the day and evening, who are available for businesses to attract into shops, restaurants or other facilities;

- **accessibility**: ease and convenience of access by a choice of means of travel, including – the quality, quantity and type of car parking; the frequency and quality of public transport services and the range of customer origins served; and, the quality of provision for pedestrians, cyclists and disabled people and the ease of access from main arrival points to the main attractions;

- **customer and residents' views and behaviour**: regular surveys will help authorities in monitoring and evaluating the effectiveness of town centre improvements and in setting further priorities. Interviews in the town centre and at home can be used to establish views of both users and non-users of the centre, including the views of residents living in or close to the centre. This information could also establish the degree of linked trips;

- **perception of safety and occurrence of crime**: should include views and information on safety and security, and where appropriate, information for monitoring the evening and night-time economy; and

- **state of the town centre environmental quality**: should include information on problems (such as air pollution, noise, clutter, litter and graffiti) and positive factors (such as trees, landscaping and open spaces).

4.3 Draft PPS4 (Annex A) proposes almost identical tests except with the addition of the following test, which has also informed our health-check assessments:

- **A8 Land values and the length of time key sites have remained undeveloped**: data on changes in land value and how long key town centre and edge of centre sites have remained undeveloped provide important indicators for how flexible policies should be framed and can help inform planning decisions.

4.4 The section below examines the four defined town centres first, followed by the six local centres. It should be noted that an additional two local centres, Helmshore and Shawforth/ Facit, have been surveyed in this update which were not surveyed in the 2005 RTCS. The town centres are explored in more depth compared to local centres, given their wider range of goods and services and reflecting their position in the Borough's shopping hierarchy.

Rawtenstall Town Centre

4.5 Rawtenstall remains the main retail centre in the Borough. The diversity of uses present in Rawtenstall in terms of the number of ground floor retail/ service units occupied, as derived from Experian Goad (November 2007) and updated by NLP (November 2008), is shown in Table 4.1 below. These are compared to the national Goad average at April 2009. The area surveyed is based on the area Goad considers to be in active retail use, and does not reflect the former defined boundaries of the town centre in the Local Plan. Please note that although the previous study was undertaken in 2005, all of the centres were surveyed in 2004. These boundaries are shown in Appendix D.

Table 4.1 Rawtenstall Town Centre Use Class Mix by Unit

Type of Unit	Number of Units		Proportion of Total Number of Units (%)	
	2008	2004[1]	Rawtenstall (2008)	National Average*
Comparison Retail	53	73	30.6	44.0
Convenience Retail	14	14	8.1	9.5
A1 Services	21	19	12.1	11.4
A2 Services	21	17	12.1	8.8
A3 and A5	14	11	8.1	14.8
A4	4	n/a	2.3	n/a
Vacant	46	17	26.6	11.4
Total	**173**	**151**	**100.0**	**100.0**

Source: Goad (Nov 07) as updated by NLP (Nov 08)
** UK average relates to all retail centres surveyed by Experian Goad (Apr 09)*
[1] N.B at the time of the 2005 RTCS the Use Classes Order did not include A4 or A5 uses

4.6 For the purposes of Table 4.1, we have considered all of the eleven vacant units in the Heritage Arcade as constituting one vacant unit, given the uncertainty regarding its future use. This is consistent with the approach used in the 2005 RTCS at which time the Heritage Arcade was also vacant and was counted as one vacant unit in total.

4.7 At the time of the 2004 survey 151 ground floor retail/service units were recorded in Rawtenstall compared to 173 ground floor retail/service units at 2008 (N.B this excludes first floor vacant units in the Valley Centre and the Heritage Arcade). This equates to an increase of 22 retail units (15%) over the 2004 to 2008 period. This increase is predominately due to a change in the method of recording retail units and specifically due to public houses being included in the total number of retail units at 2008 but being previously excluded in 2004 reflecting the current breakdown of Class A Uses contained in the Use Classes Order. In addition, this increase in retail units reflects new retail development in Rawtenstall such as the Asda foodstore. The key changes that have occurred in Rawtenstall's retail sector over the period are the relocation of the Asda foodstore into new premises on St Mary's Way, and the reoccupation of the former Asda on Bocholt Way by Tesco. This has significantly increased convenience (and to some extent comparison) goods provision in the centre, although these stores are situated on edge-of-centre sites that are not particularly well integrated with Rawtenstall's core retail area.

4.8 Table 4.1 indicates that since 2004 there has been a reduction in the number of comparison retail units from 73 to 53, which equates to a decrease of 20 units (or

27%). Conversely, the amount of vacant units has increased from 17 to 46 units, a marked increase of 29 units (or 171%). This is largely attributable to the vacant units present within the Valley Centre and the Heritage Arcade, both of which are the subject of current pending/approved planning applications for development. All categories of service uses have increased in representation since 2004.

4.9 At 2008, the proportion of comparison units (30.6%) and convenience units (8.1%) in Rawtenstall were below the national average (44.0% and 9.5%). The updated Goad survey records 12,150 sq.m (gross) as being in use for the sale of convenience goods, which equates to 34% of all floorspace compared to the Goad national average of 17%. This reflects the presence of two large-format foodstores in the Goad survey area.

4.10 The proportion of A1 services (12.1%) and A2 services (12.1%) are above the national average (11.4% and 8.8% respectively). The proportion of A3 and A5 uses (10.4%) is lower than the national average (14.8%). Rawtenstall has a high number of vacant units which in turn equates to a high proportion of vacant units (26.6%) when compared against the national average (11.4%).

4.11 In addition to the retail and service provision outlined above, an open market operates in Rawtenstall twice a week from Newchurch Road. Although the indoor market is included in the Goad survey, the outdoor market area is not included in the Goad figures.

Retailer Representation

4.12 Table 4.2 below provides a detailed breakdown of the comparison shop units in Rawtenstall at 2008 compared to the national average, and also against the range of comparison units present in 2004.

Table 4.2 Rawtenstall Town Centre: Breakdown of Comparison Shop Units

Type of Unit	Rawtenstall Town Centre			UK Average*
	Units (2008)	Units (2004)	% (2008)	%
Clothing and Footwear	15	14	28.3	26.7
Furniture, carpets and textiles	6	9	11.3	9.1
Booksellers, arts, crafts and stationers	4	5	7.5	9.3
Electrical, gas, music and photography	5	11	9.4	9.8
DIY, hardware & homewares	3	2	5.7	6.6
China, glass, gifts & fancy goods	2	4	3.8	3.9
Cars, motorcycles & motor access.	-	2	0.0	3.2
Chemists, drug stores & opticians	3	3	5.7	8.9
Variety, department & catalogue	1	1	1.9	1.8
Florists, nurserymen & seedsmen	2	3	3.8	2.5
Toys, hobby, cycle & sport	2	0	3.8	5.0
Jewellers	2	5	3.8	4.8
Other comparison retailers	8	14	15.1	8.4
Total	**53**	**73**	**100.0**	**100.0**

Source: Goad (Nov 07) as updated by NLP (Nov 08)
** UK average relates to all retail centres surveyed by Experian Goad (Apr 09)*

4.13 The information in Table 4.2 indicates that there is generally a low degree of differentiation between the national average proportion of comparison retailers and those present in Rawtenstall. Notwithstanding this, the proportion of 'other comparison retailers' (15.1%) is significantly greater than the national average (8.4%). Conversely, the proportion of 'chemist, drug stores and opticians' in Rawtenstall (5.7%) is well below the national average (8.9%), and the centre contains no representation whatsoever in the 'cars, motorcycles and motor accessories' sector.

4.14 The main differences in representation in the comparison goods sector since 2004 has been a decline in the 'other comparison retailers' (by 6 units or 43%) the 'electrical, gas, music and photography' sector (by 6 units or 55%), the 'furniture, carpets and textiles' sector (by 3 units or 33%) and the 'jewellers' sector (by 3 units or 60%). However, since 2004 the number of retailers in the 'toys, hobby, cycle & sports' sector has increased by 2 units, and the number of 'DIY, hardware and homewares' and 'clothing and footwear' sectors has increased by one unit.

4.15 Rawtenstall remains dominated by independent retailers with few national multiples, although multiples that are present include Boots and Focus.

Service Uses

4.16 As indicated above Rawtenstall contains an above average representation of service uses in the A1 and A2 sectors, with A3 and A5 uses being below the national average. Table 4.3 provides a more detailed breakdown of selected service uses in Rawtenstall in comparison to the national average and the presence of such uses recorded in 2004.

Table 4.3 Rawtenstall Town Centre: Analysis of Selected Service Uses

Type of Use	Rawtenstall Town Centre			UK Average*
	Units (2008)	Units (2004)	% (2008)	%
Restaurants, cafes & takeaways	14	11	38.3	43.9
Banks/other financial services	8	7	17.0	14.2
Estate agents and valuers	7	5	14.9	11.9
Travel agents	3	3	6.4	4.2
Hairdressers & beauty parlours	11	10	23.4	22.8
Laundries and dry cleaners	0	0	0.0	3.0
Total	**43**	**36**	**100.0**	**100.0**

Source: Goad (Nov 07) as updated by NLP (Nov 08)
**UK average relates to all retail centres surveyed by Experian Goad (Apr 09)*
N.B. 'Restaurants, cafés and takeaways' does not include the four drinking establishments in the centre

4.17 Table 4.3 shows that the centre has a higher than average proportion of units in the 'banks/other financial services', 'estate agents and valuers', 'travel agents' and 'hairdressers & beauty parlours' sectors, although 'restaurants, cafes & takeaways' are under-represented when considered against the national average. No categories of services have declined in representation since 2004, with categories having either remained static or increased their representation. Overall, the proportion of service uses has increased by seven units (19%) from 36 units in 2004 to 43 units in 2008.

Retail Rents and Yields

4.18 The Valuation Office Agency does not record information about yields achieved in Rawtenstall since 2004, except to note that they are greater than 10%, where they have remained since 1997. It is not possible to ascertain whether yields have worsened further over the 2004 to 2008 period or remained static, but they remain high compared to other competing centres in the sub-region. For example, at July 2008 the yields achieved by Accrington (8%), Blackburn (7%), Burnley (7.25%), Bury (6.5%) and Bolton (6.5%) were much lower than Rawtenstall. Retail yields reflect retailers' perception of risk associated within any particular centre with lower yields reflecting a lower perceived risk. On this basis, these results imply that Rawtenstall is seen as a less attractive centre within which to invest when compared to some other centres in the sub-region.

4.19 There are no further updates on rental levels achieved in Rawtenstall since the 2004 health check. This is because neither EGi nor the Valuation Office Agency records the rental levels achieved in smaller centres such as Rawtenstall any longer. As such, it is difficult to accurately assess the current prime Zone A rents attained using a consistent methodology that would allow comparison to the levels recorded in the 2005 RTCS.

Accessibility

4.20 Accessibility in and around Rawtenstall has remained largely unchanged since the 2005 RTCS although anecdotal evidence suggests that congestion around the gyratory system associated with the new Asda store may have increased. In addition, the development of the new Asda store has allowed the introduction of a multi-storey car park adjacent to the store on St Mary's Way, which contains approximately 300 car parking spaces.

Environmental Quality

4.21 The assessment of environmental quality in the centre remains broadly similar to that observed in the previous health-check. Whilst the environmental quality of occupied units in Rawtenstall is generally good, the presence of the Valley Centre, which is predominately vacant and incorporates boarded up properties, and the Heritage Arcade which is entirely vacant, are unattractive features of the shopping environment. As identified in the 2004 health-check, the bus shelter on Bacup Road would benefit from modernisation or redevelopment.

Conclusions

4.22 The notable changes have occurred in the retail landscape of Rawtenstall since the 2005 RTCS was undertaken are as follows:

- The relocation of the Asda store into new premises and occupation of the former Asda store by Tesco has significantly improved convenience provision in Rawtenstall, although links between these facilities and the core retail centre could be improved. A Lidl store has recently opened in Rawtenstall further supplementing convenience goods provision (although this was still under construction at the time of the household survey);
- The number of comparison retail units in Rawtenstall has significantly declined over the 2004 to 2008 period;
- The proliferation of vacancies has increased dramatically and these are concentrated in the Valley Centre. If this site is brought forward for development, it would be beneficial to the retail offer and environmental quality of the centre. The Valley Centre is a crucial site at the heart of Rawtenstall and has witnessed an increase in vacancies since 2004. This site has the

potential to introduce new modern floorspace into the town centre which would help to attract national multiples;

- Yields in Rawtenstall remain high (greater than 10%) and there is a need to improve investor confidence in the centre;

- Rawtenstall has not attracted any further comparison national multiples since 2004, and the presence of such key attractors would improve the draw of the centre;

- The future of the New Hall Hey development to the south of Rawtenstall Town Centre is unclear, and the implications of this will have an impact on the future health of the wider centre.

4.23 Table 4.4 below provides a summary of the SWOT analysis recorded in the 2005 RTCS.

Table 4.4 Rawtenstall Town Centre: 2005 RTCS SWOT analysis

Strengths	**Weaknesses**
• Serves day-to-day shopping needs of residents. Important convenience function • Good range of independent retailers; • Historic centre, attractive environment; • Bank Street provides a pleasant focus of the towns retailing. Well maintain buildings and shop fronts; • Twice weekly market.	• Perceived problem of parking in terms of amount and linkages with the centre; • Limited evening economy, little activity at night; • Lack of national multiple retailers; • Lack of available and suitable shop units for larger retailers and national multiples.
Opportunities	**Threats**
• Improved links between town centre and Asda could attract more shoppers to Rawtenstall and improve vitality and viability; • Lack of national multiples provide an opportunity to improve the retail offer; • Valley Centre and town hall redevelopment to provide a new core.	• Continued improvements to competitor centres such as Accrington and Bury will attract more trade from Rawtenstall; • Increase in internet sales; • Strong reliance on Asda to attract shoppers; • Plans for out-of-centre Tesco in Haslingden could undermine the prospects of a new foodstore in Rawtenstall.

Source: Rossendale Borough Council Town Centre and Retail Study 2005

4.24 In terms of the previous SWOT analysis set out in the 2005 RTCS there have been several changes. These are as follows:

- Weaknesses: The parking problems observed in the previous health-check have been improved through the additional car parking facilities provided adjacent to the Asda store on St Marys Way.

- Opportunities: An opportunity to strengthen linkages between the Asda store, which at the time of the study was on Bocholt Way, and the rest of the town centre. This has now moved to St Mary's Way and the former unit on Bocholt Way is now occupied by Tesco. Notwithstanding this, there is still an opportunity to strengthen links between both of these units and Rawtenstall Town Centre. A new health facility is under construction on the former JF Tomlinson shoe factory which will support the town centre function of the Rawtenstall.

- Threats: The 2005 RTCS considered the development of an out-of-centre foodstore at Syke Side, Haslingden as a potential threat to the relocation of the Asda store and the introduction of Tesco in Rawtenstall. However, all three stores have now commenced trading.

Bacup Town Centre

4.25 Table 4.5 demonstrates the diversity of uses present in Bacup, in terms of the number and proportion of retail units occupied, based on the Goad survey (October 2007) as updated by NLP (November 2008). The Goad Town Centre Plan is shown at Appendix D. This is compared to the national average and the data contained in the 2005 RTCS.

Table 4.5 Bacup Town Centre Use Class Mix by Unit

Type of Unit	Number of Units		Proportion of Total Number of Units (%)	
	2008	2004[1]	Bacup (2008)	National Average*
Comparison Retail	23	28	23.0	44.0
Convenience Retail	11	12	11.0	9.5
A1 Services	16	15	16.0	11.4
A2 Services	10	14	10.0	8.8
A3 and A5	16	10	16.0	14.8
A4	5	n/a	5.0	n/a
Vacant	19	27	19.0	11.4
Total	**100**	**106**	**100.0**	**100.0**

Source: Goad (Sep 07) as updated by NLP (Nov 08)
** UK average relates to all retail centres surveyed by Experian Goad (Apr 09)*
[1] N.B at the time of the 2005 RTCS the Use Classes Order did not include A4 or A5 uses

4.26 Based on the updated Goad survey of ground floor retail/ service units, there were 100 retail/ service units in Bacup in November 2007, which represents a decline of 6 retail units (6%) since 2004 when 106 such units were recorded.

4.27 The proportion of comparison retail units (23%) is well below average (44.0%) although given the local catchment of Bacup it would not been expected to contain a high proportion of comparison units. However, this provision is supplemented by the open market which trades twice a week with an additional flea market held once a week. Convenience units (11.0%) and all categories of service uses (42.0% excluding Class A4) are greater than the national average (9.5% and 35.0% respectively). Vacant units represent 19% of all retail units, which is significantly higher than the national average of 11.4%.

4.28 Since 2004 the numbers of comparison, convenience and A2 services have all declined, with A1 services remaining stable and the number of units in A3 to A5 service use having increased. Over the same period, the number of vacant retail/ service outlets has fallen from 27 to 19, a substantial decline of 8 units (or 30%).

Retailer Representation

4.29 As shown in Table 4.5, there is considerable differentiation between the representation of comparison retailers in Bacup and the national average for UK town Centres. Bacup contains no retailers in the ‘china, glass, gifts & fancy goods’, ‘cars, motorcycles & motor accessories’, ‘variety, department & catalogue’ or ‘jewellers’ sectors, and very low representation in the ‘clothing and footwear’ (4.3%) and ‘electrical, gas, music and photography’ (4.3%) sectors when compared to the national average (26.7% and 9.8% respectively). Sub-sectors particularly well represented compared to the national average include ‘furniture, carpets and textiles’, ‘chemists, drug stores & opticians’ and ‘florists, nurserymen & seedsmen’.

Table 4.6 Bacup Town Centre: Breakdown of Comparison Shop Units

Type of Unit	Bacup Town Centre			UK Average*
	Units (2008)	Units (2004)	% (2008)	%
Clothing and Footwear	1	6	4.3	26.7
Furniture, carpets and textiles	4	1	17.4	9.1
Booksellers, arts, crafts and stationers	3	3	13.0	9.3
Electrical, gas, music and photography	1	1	4.3	9.8
DIY, hardware & homewares	3	1	13.0	6.6
China, glass, gifts & fancy goods	0	3	0.0	3.9
Cars, motorcycles & motor access.	0	0	0.0	3.2
Chemists, drug stores & opticians	4	3	17.4	8.9
Variety, department & catalogue	0	0	0.0	1.8
Florists, nurserymen & seedsmen	2	1	8.7	2.5
Toys, hobby, cycle & sport	1	0	4.3	5.0
Jewellers	0	1	0.0	4.8
Other comparison retailers	4	8	17.4	8.4
Total	**23**	**28**	**100.0**	**100.0**

Source: Goad (Sep 07) as updated by NLP (Nov 08)
** UK average relates to all retail centres surveyed by Experian Goad (Apr 09)*

4.30 Since 2004 two national multiple retailers have opened, including a Lloyds Pharmacy on Rochdale Road.

Service Uses

4.31 Table 4.7 demonstrates that Bacup contains a wide range of service uses, with ‘restaurants, cafes & takeaways’ being particularly well represented accounting for nearly half (48.5%) of all the service uses shown, compared to a national average of 43.9%. The proportion of ‘hairdressers & beauty parlours’ and ‘laundries and dry cleaners’ are also above average, with the remaining service categories below average.

Table 4.7 Bacup Town Centre: Analysis of Selected Service Uses

Type of Use	Bacup Town Centre			UK Average*
	Units (2008)	Units (2004)	% (2008)	%
Restaurants, cafes & takeaways	16	10	48.5	43.9
Banks/other financial services	4	8	12.1	14.2
Estate agents and valuers	2	5	6.1	11.9
Travel agents	1	2	3.0	4.2
Hairdressers & beauty parlours	9	9	27.3	22.8
Laundries and dry cleaners	1	0	3.0	3.0
Total	**33**	**34**	**100.0**	**100.0**

Source: Goad (Sep 07) as updated by NLP (Nov 08)
**UK average relates to all retail centres surveyed by Experian Goad (Apr 09)*
N.B. 'Restaurants, cafés and takeaways' does not include the five drinking establishments in the centre

4.32 Since 2004, the service sector has declined by one unit in overall terms to 33 units. This decline is attributable to a decline in the number of 'banks/ other financial services' by four units, 'estate agents and valuers' by three units and 'travel agents' by one unit, although over the same period 'restaurants, cafes & takeaways' have increased by six units.

Retail Rents and Yields

4.33 Given the modest size of Bacup no information on rental levels or yields is available.

Accessibility

4.34 Wider vehicular access to Bacup Town Centre has been improved by the replacement of the former traffic lights with a roundabout at the Bacup Road/ Burnley Road East junction.

Environmental Quality

4.35 There have been no significant changes to the environmental quality of Bacup since the previous assessment, although we note that some new development has taken place along Rochdale Road. A design competition has been held to improve St James; Square, in collaboration with CABE and the Arts Council, through the Elevate (Housing Market Renewal pathfinder) scheme.

Conclusions

4.36 In conclusion this health-check update has shown that

- The overall number of retail/ service unit in Bacup has declined from 106 units in 2004 to 100 units in 2008.

- The number and proportion of comparison retail outlets in Bacup has fallen over the 2004 to 2008 period. Preventing further decline and supporting this sector would benefit the attraction and overall health of Bacup, which may be achieved by consolidating existing retail provision on a smaller area and supporting planning applications for new, modern retail units which could encourage new comparison goods operators to locate in Bacup;

- The proportion of vacant units is well above the national average, but vacancies have declined significantly since 2004, which is a positive sign for the centre;

- The presence of national multiples in the centre has increased since 2004;

- The provision of A3 to A5 uses in Bacup has been increased over the 2004 to 2008 period;

- Environmental quality in the centre remains good.

4.37 A summary of the SWOT analysis recorded in the 2005 RTCS is shown in Table 4.8

Table 4.8 Bacup Town Centre: 2005 RTCS SWOT analysis

Strengths	**Weaknesses**
• Serves day-to-day shopping needs of residents. Important top-up shopping function; • Pedestrian friendly shopping streets; • Architectural quality of buildings is generally high.	• Poor variety of food and drink uses; • The centre lacks focus with retail facilities dispersed along a number of streets; • The period buildings and conservation area designation could restrict opportunities for future new development or expansion/ improvement; • Market area provides a dead space on non-market days; • Vacancy rate is twice as high as the national average; • Limited range of retail shops and services; • Several poor quality shop frontages and some clusters of vacant units.
Opportunities	**Threats**
• Expenditure growth could provide opportunities to improve the range and choice of shops and services; • May be scope to create a stronger retail focus • Relocation of market could provide space for new development or a public square; • If vacant units were improved and marketed this could improve the range and choice of shops and services; • Heritage value of Bacup could be used to promote the centre, particularly to tourists.	• Bacup provides limited opportunities to expand facilities in the town centre; • Growth of internet shopping; • Limited/ no demand for premises within Bacup from national and regional retail and leisure operators. Dominance of independents; • Growing attraction of other nearby centres could draw trade from Bacup.

Source: Rossendale Borough Council Town Centre and Retail Study 2005

4.38 Since the 2005 RTCS, the main changes to the SWOT analysis relating to Bacup are:

- Strengths/ Opportunities: The granting of planning permission for a new foodstore in Bacup (Section 106 pending) will, if implemented, increase the convenience offer of the centre and enhance its environmental quality;

- Weaknesses: Although the vacancy rate remains very high compared to the national average, it has declined significantly since the previous health check.

Haslingden Town Centre

4.39 At November 2008, Haslingden contained some 108 retail/ service units at ground-floor level as shown in Table 4.9. This is comparable with the 107 units that were recorded in 2004. We note that the number of units in retail/ service use has expanded beyond the boundaries surveyed by Goad in July 2007. The Goad Town Centre Plan is shown at Appendix D.

Table 4.9 Haslingden Town Centre Use Class Mix by Unit

Type of Unit	Number of Units		Proportion of Total Number of Units (%)	
	2008	**2004[1]**	**Haslingden (2008)**	**National Average***
Comparison Retail	24	33	22.2	44.0
Convenience Retail	12	12	11.1	9.5
A1 Services	17	12	15.7	11.4
A2 Services	10	10	9.3	8.8
A3 and A5	19	22	17.6	14.8
A4	6	n/a	5.6	n/a
Vacant	20	18	18.5	11.4
Total	**108**	**107**	**100.0**	**100.0**

Source: Goad (Jul 07) as updated by NLP (Nov 08)
** UK average relates to all retail centres surveyed by Experian Goad (Apr 09)*
[1] N.B at the time of the 2005 RTCS the Use Classes Order did not include A4 or A5 uses

4.40 The proportion of comparison retail units (22.2%) is well below the national average (44.0%), although in common with Bacup the centre would not be expected to contain a wide variety of comparison retailers due to its catchment size and position in the retail hierarchy. The proportion of units in convenience retail use (11.1%) is above the national average (9.5%), and similarly all categories of services are above average (representing 42.6% - excluding Class A4) of all units compared to the national average of 35.0%). Additional convenience and comparison goods provision is provided by Haslingden market, which operates twice a week.

4.41 Vacancies account for 18.5% of all units which is well above the national average of 11.4%. It is evident that there has been some change in vacant outlets since 2004, with a high number of units having become vacant and a similar number reoccupied. This indicates that a natural recycling of units is occurring as would be expected, although a number of long term and poor quality vacant units remain.

4.42 Since 2004, there has been some change in the diversity of uses present in Haslingden. The number of units in comparison retail use has declined from 33 units in 2004 to 24 units in 2008, which represents a notable decline of 9 units (or 27%).

Representation in the A3 to A5 service sector has increased by three units, and representation in the A1 service sector has increased by five units since 2004. The number of units in convenience retail use and A2 service use has remained the same, with the number of vacant units increasing by two.

Retailer Representation

4.43 Table 4.10 below provides a detailed breakdown of comparison retail units in Haslingden, which are compared to both the national average and the situation in 2004.

Table 4.10 Haslingden Town Centre: Breakdown of Comparison Shop Units

Type of Unit	Haslingden Town Centre			UK Average*
	Units (2008)	Units (2004)	% (2008)	%
Clothing and Footwear	1	1	4.2	26.7
Furniture, carpets and textiles	6	5	25.0	9.1
Booksellers, arts, crafts and stationers	3	2	12.5	9.3
Electrical, gas, music and photography	1	4	4.2	9.8
DIY, hardware & homewares	3	3	12.5	6.6
China, glass, gifts & fancy goods	0	1	0.0	3.9
Cars, motorcycles & motor access.	0	1	0.0	3.2
Chemists, drug stores & opticians	3	4	12.5	8.9
Variety, department & catalogue	0	0	0.0	1.8
Florists, nurserymen & seedsmen	2	2	8.3	2.5
Toys, hobby, cycle & sport	1	3	4.2	5.0
Jewellers	0	0	0.0	4.8
Other comparison retailers	4	7	16.7	8.4
Total	**24**	**33**	**100.0**	**100.0**

Source: Goad (Jul 07) as updated by NLP (Nov 08)
** UK average relates to all retail centres surveyed by Experian Goad (Nov 2007)*

4.44 Haslingden contains no representation in the 'china, glass, gifts & fancy goods', 'car, motorcycles and motor accessories', 'variety, department & catalogue' and 'jewellers' categories. The majority of comparison goods representation is accounted for by retailers in the 'furniture, carpets and textiles', 'other comparison retailers', 'booksellers, arts, crafts and stationers', 'DIY, hardware & homewares' and 'chemist, drug stores & opticians', all of which are above the national average.

4.45 Since 2004, the only category of comparison goods subsectors that have increased are 'booksellers, arts, crafts and stationers' and 'furniture, carpets and textiles', which have both increased by one unit. All other categories have either remained the same or declined. Of particular note, 'electrical, gas, music and photography' and 'other comparison retailers' have both declined by three units each, with 'toys, hobby, cycle & sport' retailers declining by two units.

Service Uses

4.46 A good range of service uses are present in Haslingden as shown in Table 4.9. The proportion of 'restaurants, cafes & takeaways' and 'hairdressers & beauty parlours' is above the national average, with all other categories of services being below the national average. 'Estate agents and valuers' are particularly poorly represented, accounting for 5.3% of service units compared to the national average of 11.9%.

Table 4.11 Haslingden Town Centre: Analysis of Selected Service Uses

Type of Use	Haslingden Town Centre			UK Average*
	Units (2008)	Units (2004)	% (2008)	%
Restaurants, cafes & takeaways	19	22	50.0	43.9
Banks/other financial services	5	7	13.2	14.2
Estate agents and valuers	2	2	5.3	11.9
Travel agents	1	1	2.6	4.2
Hairdressers & beauty parlours	10	7	26.3	22.8
Laundries and dry cleaners	1	1	2.6	3.0
Total	**38**	**40**	**100.0**	**100.0**

Source: Goad (Jul 2007) as updated by NLP (Nov 08)
**UK average relates to all retail centres surveyed by Experian Goad (Apr 09)*
N.B. 'Restaurants, cafés and takeaways' does not include the six drinking establishments in the centre

4.47 Overall the service sector has declined by two retail units since 2004. Although the number of 'hairdressers & beauty parlours' has increased by three units, the number of 'restaurants, cafes & takeaways' and 'banks/ other financial services' have both declined by three units and two units respectively. Since 2004 a branch of Halifax Bank has closed. The NHS Health Centre previously located on Deardengate has also closed leaving a large central vacant site. We note that there is a health centre on the Manchester Road/ Warner Street junction.

Retail Rents and Yields

4.48 Due to the modest size of Haslingden no information on rental levels or yields is available.

Accessibility

4.49 There has been no notable change to accessibility in Haslingden since the previous assessment.

Environmental Quality

4.50 There have been no significant changes to the environmental quality of Haslingden since 2004. However, we note that the quality of the southern part of the centre on

Deardengate deteriorates compared to the rest of the centre, given the impact of vehicular traffic.

Conclusions

4.51 The main points to note from this update in terms of the vitality and viability of Haslingden are:

- Retail/service provision in Haslingden has expanded beyond the area surveyed by Goad in 2004, and the overall number of units in retail/ service use has marginally increased;

- Comparison goods provision in the centre has declined notably since 2004. Further decline in this sector will further affect its vitality and viability and additional comparison goods provision in Haslingden should be supported if possible in order to widen the choice of goods available;

- The provision of A1 services and A3 to A5 services in Haslingden has increased over the 2004 to 2008 period;

- There is a high proportion of vacant units in the centre when compared with the national average, and some of these vacant units are of poor quality. However, a natural reoccupation of units appears to be occurring as there are few long-term vacancies;

- Few national multiples were recorded in Haslingden in the previous health-check, and these have declined further at 2008 with the closure of the former Halifax Bank branch on Manchester Road.

4.52 A summary of the RTCS 2005 SWOT analysis for Haslingden is shown in Table 4.12.

Table 4.12 Haslingden Town Centre: 2005 RTCS SWOT analysis

Strengths	**Weaknesses**
• Serves day to day convenience retail and service need of local residents; • Wide range of service uses present; • Provides an attractive shopping environment; • Ample street parking; • Twice weekly market.	• Preponderance of low value discount retailers and charity shops; • No national multiples other than Co-op; • Predominantly small retail units and limited large modern retailers; • Several shopfronts in poor condition; • No main food shopping facility; • Fragmented car parking; • Town split north/ south due to Manchester Road/ Blackburn Road; • Centre is tightly developed, few opportunity for further retail floorspace.
Opportunities	**Threats**
• Number of vacancies which could be used to improve the range and choice of shops and services available.	• Limited/ no demand for premises from national and regional retail and leisure operators. Dominance of independent retailers; • Proposed out-of-centre Tesco store will draw trade from the centre.

Source: Rossendale Borough Council Town Centre and Retail Study 2005

4.53 In terms of the previous SWOT analysis relating to Haslingden, there has been only one change over the 2004 to 2008 period:

- Threat: The development of a Tesco store at Syke Side was noted as a threat in the previous health-check and this store has subsequently been developed, although the impact on the existing retailers in Haslingden appears to have been limited based on the market shares recorded in Section 3.0.

Waterfoot Town Centre

4.54 Given the relatively modest size of Waterfoot it is not surveyed by Goad. Consequently, NLP has undertaken a survey in November 2008 of all retail/ service uses in the centre and categorised the results on the basis of the Goad definitions of town centre uses. This information is presented in Table 4.13, together with a comparison with the Goad national average and the results recorded in the 2004 survey.

Table 4.13 Waterfoot Town Centre Use Class Mix by Unit

Type of Unit	Number of Units		Proportion of Total Number of Units (%)	
	2008	**2004[1]**	**Waterfoot (2008)**	**National Average***
Comparison Retail	8	12	15.4	44.0
Convenience Retail	8	5	15.4	9.5
A1 Services	11	11	21.2	11.4
A2 Services	3	5	5.8	8.8
A3 and A5	9	11	17.3	14.8
A4	2	n/a	3.8	n/a
Vacant	11	5	21.2	11.4
Total	**52**	**49**	**100.0**	**100.0**

Source: NLP (Nov 08)
** UK average relates to all retail centres surveyed by Experian Goad (Apr 09)*
[1] N.B at the time of the 2005 RTCS the Use Classes Order did not include A4 or A5 uses

4.55 Waterfoot Town Centre contains 52 retail/ service units. Convenience retailers in the centre are well represented in terms of the proportion of units, representing 15.4% of all units compared to the national average of 9.5%. Comparison retailers also account for 15.4% of all units which is considerably lower than the national average of 44.0%. A1 service units (21.2%) are double the national average (11.4%), and A3 to A5 service units (21.1%) are also well represented compared to the national average (14.8%). The proportion of A2 services in Waterfoot is low (5.8%, compared to a national average of 8.8%).

4.56 Since 2004, the number of comparison retail units in Waterfoot has declined by four (or 33%), although the proportion of convenience retail units has increased by three (60%). This reflects the role of Waterfoot in providing day-to-day goods to a small local catchment. Over the 2004 to 2008 period the proportion of A2 services has declined by two units. The number of A3 to A5 units has remained at 11 units and A1 services have also remained at 11 units.

4.57 Vacant units in the centre account for 21.2% of total retail/ service units, which is nearly double the national average of 11.4%. Vacant units are concentrated on the western side of Burnley Road East, with 8 vacant units (or 73% of total vacancies) in this location. The presence of vacant units has more than doubled to 11 units at 2008 compared to 5 units at 2004, an increase of some 120%.

Retailer Representation

4.58 Given that the centre contains only eight comparison retail units, we do not consider it beneficial to breakdown this category into the level of detail provided for the other main centres in Rossendale. However, the comparison retailers present in Waterfoot provide a variety of essential items suited to the role of the centre and its local shopping catchment, including a hardware store, and a household goods store. This sector has weakened since 2004 and comparison goods provision is limited.

Service Uses

4.59 The range of a selected number of service uses in Waterfoot is shown in Table 4.14 below. The majority of service uses shown (52.9%) are accounted for by 'restaurants, cafes & takeaways' which exceed the national average (43.9%). This sub-sector is dominated by 'fast food and take-away' outlets. 'Hairdressers & beauty parlours' (29.4%) and 'laundries and dry cleaners' (5.9%) are also above the national average (22.8% and 3.0% respectively). There is no representation in the 'travel agents' sector, with the number of 'banks/ other financial services' and 'estate agents and valuers' being below the national average.

Table 4.14 Waterfoot Town Centre: Analysis of Selected Service Uses

Type of Use	Waterfoot Town Centre			UK Average*
	Units (2008)	Units (2004)	% (2008)	%
Restaurants, cafes & takeaways	9	11	52.9	43.9
Banks/other financial services	1	1	5.9	14.2
Estate agents and valuers	1	1	5.9	11.9
Travel agents	0	1	0.0	4.2
Hairdressers & beauty parlours	5	7	29.4	22.8
Laundries and dry cleaners	1	1	5.9	3.0
Total	**17**	**22**	**100.0**	**100.0**

Source: NLP (Nov 08)
**UK average relates to all retail centres surveyed by Experian Goad (Nov 2007)*
N.B. 'Restaurants, cafés and takeaways' does not include the two drinking establishments in the centre

4.60 The selected services shown in Table 4.14 have declined by 5 units overall (22.7%) since 2004. This is attributable to a decline in the number of ‘hairdressers & beauty parlours’ and ‘restaurants, cafes & takeaways’ by two units each, and the loss of a travel agent.

Retail Rents and Yields

4.61 Due to the modest size of Waterfoot no data on rental levels or yields is available.

Accessibility

4.62 Since the 2004 health check, a roundabout has been installed on the Bacup Road/ Burnley Road East road junction which replaces the former traffic light system. This appears to have eased congestion in the area, although the high volumes of traffic using Bacup Road still cause tailbacks through Waterfoot.

Environmental Quality

4.63 There has been no significant changes to the environmental quality of Waterfoot since the previous assessment, although it is noted that some of the vacant units are of poor environmental quality.

Conclusions

4.64 This vitality and viability update has shown that:

- Comparison retail units in Waterfoot have declined since 2004, reducing the diversity of goods on offer. Provision in the comparison sector is limited;
- Notwithstanding the above, convenience retailers have increased in representation reflecting the predominately local shopping role of the centre;
- Overall, the provision of services has generally remained the same over the 2004 to 2008 period, although the presence of A2 services has declined. However, there has been some change within individual sub-sectors of services;
- The vacancy rate in Waterfoot is more than double the national average, and has increased significantly over the 2004 to 2008 period. This implies a declining attractiveness in the centre from retailers;
- Waterfoot does not have the wider range of goods, services and civic functions that are provided in the other defined town centres in Rossendale, although given the size of centre this is unsurprising.

4.65 A summary of the RTCS 2005 SWOT analysis for Waterfoot is shown in Table 4.15.

Table 4.15 Waterfoot Town Centre: 2005 RTCS SWOT analysis

Strengths	**Weaknesses**
• Serves basic day to day shopping and service needs of residents; • Contains attractive buildings and benefits from proximity to River Irwell.	• No regional and national multiples; • Lack of some key services eg. Banks.
Opportunities	**Threats**
• Could develop a niche role in DIY, homewares and soft furnishings; • Waterside setting could be capitalised on; • Improvements to roadside parking would be beneficial.	• New development in surrounding centres.

Source: Rossendale Borough Council Town Centre and Retail Study 2005

4.66 In terms of the SWOT analysis undertaken in the 2005 RTCS the main changes that have occurred are:

- Weaknesses: Although the previous health-check highlights a lack of national multiples in the centre, a Co-op is present which does serve as the key retailer attractor. Notwithstanding this, Waterfoot remains weak in this regard.

- Opportunities: The previous health-check noted that expansion of Waterfoot as a niche retail role in DIY, homewares and soft furnishings was a potential opportunity. Provision in this sector has declined since the 2005 RTCS, however, and it is still unclear whether this can be achieved.

Local Centres

4.67 In the remainder of this section we consider the vitality and viability of the six other local centres in the Borough. Although we have compared the centres against the national average it is of limited significance given the modest size of the centres.

Whitworth Centre

4.68 NLP has undertaken, in November 2008, a survey of all retail/ service uses in Whitworth to provide an update of the 2004 analysis. No shopping centre boundary for Whitworth was defined in the Rossendale District Local Plan, although the area surveyed comprises the retail focus of the centre and is centred on Market Street from the Co-op store to the north to the junction with North Street to the south. A plan of the area surveyed is included at Appendix D. The diversity of uses present in Whitworth compared to the Goad national average and the 2004 survey is shown below.

Table 4.16 Whitworth Centre Use Class Mix by Unit

Type of Unit	Number of Units		Proportion of Total Number of Units (%)	
	2008	2004[1]	Whitworth (2008)	National Average*
Comparison Retail	4	4	23.5	44.0
Convenience Retail	2	2	11.8	9.5
A1 Services	5	5	29.4	11.4
A2 Services	0	0	0.0	8.8
A3 and A5	4	5	23.5	14.8
A4	1	n/a	5.9	n/a
Vacant	1	4	5.9	11.4
Total	**17**	**20**	**100.0**	**100.0**

Source: NLP (Nov 08)
** UK average relates to all retail centres surveyed by Experian Goad (Apr 09)*
[1] N.B at the time of the 2005 RTCS the Use Classes Order did not include A4 or A5 uses

4.69 Table 4.16 shows that there were some 17 retail/ service units in Whitworth at the time of the 2008 NLP survey. It contains 4 comparison retail units, accounting for a quarter of all retail units compared to the national average of 44.0%. Retailers in this sector comprise a chemist, a charity shop, a florists and a pet shop. Convenience retailers account for 2 units (12.5%) and exceed the national average (9.5%). These comprise a Co-op foodstore and a bakery.

4.70 Class A1 services in the centre account for 29.4% of all units compared to the national average of 11.4%, although the centre contains no representation in the A2 services sector. A3 to A5 uses account for 29.4% of all units which is significantly higher than the national average. There is only one vacant unit in Whitworth.

4.71 Since 2004, there has been a decline in the total number of units by 3, which is likely to be attributable to the conversion of retail/ service units into non-retail uses. Although the overall numbers of comparison, convenience and service uses has not changed over the period, there has been some change within these sectors. For example, at 2004 an off licence and a furniture shop were present in the centre, whilst there was no pharmacy or bakery.

4.72 In addition to the retail and service offer outlined above, the centre contains a Methodist Church and a Medical Centre.

4.73 Limited on-street parking is provided in Whitworth along Market Street with off-road car parking facilities located adjacent to the Co-op foodstore and the Medical Centre. Bus stops are provided along Market Street and provide connections to local destinations including Bacup, Waterfoot, Rawtenstall and Rochdale. Pedestrian movement around the centre is unproblematic and a pedestrian crossing is provided.

4.74 Environmental quality within Whitworth is reasonable with most of the occupied units being well maintained. This appears to have improved since the previous 2004 survey which deemed the quality of buildings in Whitworth to be 'generally poor'. There is no evidence of litter, vandalism or graffiti in the centre.

4.75 On balance, Whitworth is an important local centre and appears to trade well with a reasonable range of essential everyday goods and services provided and low vacancies.

Crawshawbooth Local Centre

4.76 Table 4.17 below sets out the diversity of uses present in Crawshawbooth at November 2008, based on an NLP survey and categorised on the basis of the Experian Goad definitions of town centre uses. A plan of the area surveyed is included at Appendix D.

Table 4.17 Crawshawbooth Local Centre Use Class Mix by Unit

Type of Unit	Number of Units		Proportion of Total Number of Units (%)	
	2008	**2004[1]**	**Crawshawbooth (2008)**	**National Average***
Comparison Retail	7	7	23.3	44.0
Convenience Retail	5	4	16.7	9.5
A1 Services	9	4	30.0	11.4
A2 Services	0	1	0.0	8.8
A3 and A5	4	5	13.3	14.8
A4	1	n/a	3.3	n/a
Vacant	4	4	13.3	11.4
Total	**30**	**25**	23.3	**100.0**

Source: NLP (Nov 08)
** UK average relates to all retail centres surveyed by Experian Goad (Apr 09)*
[1] N.B at the time of the 2005 RTCS the Use Classes Order did not include A4 or A5 uses

4.77 At the time of the survey, there were 30 retail/ service units in Crawshawbooth Local Centre, which represents an increase of 5 units (20%) from its 2004 level.

4.78 Comparison retailers occupy 23.3% of retail units in the centre at 2008, which is less than half the national average of 44.0%. This sector includes a chemist, a wool shop, a jeweller, a dress shop and a book shop. There has been no change in the total number of comparison retail units over the 2004 to 2008 period.

4.79 Convenience retailers account for 5 units in Crawshawbooth at 2008, which represents an increase of 1 unit from the 2004 level. Convenience retailers equate to 16.7% of retail units at 2008, compared to the national average of 9.5%, and consequently the centre contains good provision in this sector. The centre contains two bakeries, a butcher, a newsagents and a Premier convenience store.

4.80 Class A1 services represent 30.0% of units in the centre, which is well above the national average of 11.4%. The number of A1 service units at 2008 (9 units) is 12.5% higher than the number at 2004 (4 units). A variety of services are provided in this sector, including hairdressers (3 units), a post office, a travel agent and a photography studio.

4.81 There is no representation at all in the A2 services sector. A3 and A5 services represent 13.3% of all units. The number of units in this sector (5) has remained stable since 2004, and comprises one café, one public house and three fast food and take-away units.

4.82 Four retail/service units are vacant, equating to 12.9% of all units which is above the national average of 11.4%. These units are all situated in the northern part of the centre. There has been no change in the number of vacant units in Crawshawbooth over the 2004 to 2008 period.

4.83 Crawshawbooth contains an off-street car park on Adelaide Street. Limited on-street parking is also available. Bus services operate through the centre and connect to Bolton, Burnley and Rawtenstall as well as an express service to Manchester. Movement around the centre on foot is unconstrained.

4.84 Environmental quality in the centre is generally good, with well maintained units and no litter or graffiti evident, though lack of short stay parking may be an issue.

Edenfield Local Centre

4.85 The diversity of uses present in Edenfield Local Centre is shown in Table 4.18 below. At November 2008 the centre contained 11 retail units. A plan of the area surveyed is included at Appendix D.

Table 4.18 Edenfield Local Centre Use Class Mix by Unit

Type of Unit	Number of Units		Proportion of Total Number of Units (%)	
	2008	**2004[1]**	**Edenfield (2008)**	**National Average***
Comparison Retail	2	2	18.2	44.0
Convenience Retail	3	1	27.3	9.5
A1 Services	0	6	0.0	11.4
A2 Services	0	1	0.0	8.8
A3 and A5	2	2	18.2	14.8
A4	1	n/a	9.1	n/a
Vacant	3	1	27.3	11.4
Total	**11**	**13**	**100.0**	**100.0**

Source: NLP (Nov 08)
** UK average relates to all retail centres surveyed by Experian Goad (Apr 09)*
[1] N.B at the time of the 2005 study the Use Classes Order did not include A4 or A5 uses

4.86 The centre contains 2 comparison retailers; a pharmacy and a paint shop, 3 convenience traders: a bakery, a butcher and a newsagent; two take-away units and a public house. Given the modest size of this centre, it would not be expected to reflect the national average for shopping centres, although on a proportional basis convenience units and A3 and A5 services appear to be over represented, and comparison retail units are comparatively under-represented. There is no representation in the A1 or A2 service sectors.

4.87 Edenfield also contains three vacant units which equate to 27.3% of all units, well above the national average of 11.4%. Two of these units are situated at the northern end of Market Street and are of poor quality, with the other vacant unit in the centre of Edenfield adjacent to the Bury Road/ Rochdale Road/ Market Road junction.

4.88 Since 2004 the overall number of retail/ service has decreased by 2 units from 13 units in total. Over the 2004 to 2008 period the number of convenience retail units has increased by 2, with A1 and A2 services having declined from 7 units to 0 units. A3 to A5 units have increased by 1 unit and vacant units have increased by 2 units. Comparison retail units have remained the same.

4.89 Movement around Edenfield on foot is unproblematic and a pedestrian crossing is provided although footfall appears low. Free on-street parking is provided along Market Street and the public house has a dedicated car park for customers. Bus services operate through the centre connecting it to local destinations.

4.90 In terms of environmental quality, it appears that the Edenfield Memorial Garden is a recent addition to the centre and provides a small, well maintained area of public open space incorporating a seating area. The retail units are of variable quality, with some appearing dated and would benefit from investment to improve their visual appearance.

Helmshore Local Centre

4.91 The diversity of uses present in Helmshore Local Centre is shown in Table 4.19 below. This centre was not surveyed in the 2005 RTCS, but has been assessed in this update at the request of Council Officers. Table 4.15 indicates that at the time of the survey (March 2009) there were 12 retail/service units in the centre, and a plan showing the areas surveyed is included at Appendix D.

Table 4.19 Helmshore Local Centre Use Class Mix by Unit

Type of Unit	Number of Units	Proportion of Total Number of Units (%)	
	2009	**Helmshore (2009)**	**National Average***
Comparison Retail	1	8.3	44.0
Convenience Retail	3	25.0	9.5
A1 Services	4	33.3	11.4
A2 Services	1	8.3	8.8
A3 and A5	2	16.7	14.8
A4	0	0.0	n/a
Vacant	1	8.3	11.4
Total	**12**	**100.0**	**100.0**

Source: NLP (Mar 09)
** UK average relates to all retail centres surveyed by Experian Goad (Apr 09)*

4.92 Retailing in the centre is concentrated in two purpose built shopping parades on Broadway and Broadway Crescent, with two additional units situated on Helmshore Road close to the junction with Broadway. The centre contains a modest range of retail and service uses, however it performs an important function for local residents and includes a Post Office, a pharmacy and several convenience stores and fast food take away units.

4.93 Accessibility to the centre is unproblematic. The retail facilities are easily accessible on foot from the surrounding residential area, and a bus stop is situated immediately adjacent to the shopping parade on Broadway. Free off-street car parking is provided adjacent to the shopping parade on Broadway, with free on-street parking available outside the shopping parade on Broadway Crescent.

4.94 Retail units within Helmshore are generally well maintained and are of good environmental quality. The only vacant unit in the centre is of poorer visual amenity, but does not detract from the high standard of maintenance of the surrounding units. There is a small area of greenspace adjacent to the retail units on Broadway.

Shawforth/Facit Local Centre

4.95 Shawforth/Facit comprises two separate groups of retail units situated adjacent to Market Street (the A671). The diversity of uses present in the centre, as derived from an NLP site survey in March 2009, indicates that the centre contains some 12 units. A plan of the area surveyed is included at Appendix D. This centre was not surveyed as part of the 2005 RTCS.

Table 4.20 Shawforth/ Facit Local Centre Use Class Mix by Unit

Type of Unit	Number of Units	Proportion of Total Number of Units (%)	
	2009	Shawforth/ Facit (2009)	National Average*
Comparison Retail	2	15.4	44.0
Convenience Retail	3	23.1	9.5
A1 Services	1	7.7	11.4
A2 Services	0	0.0	8.8
A3 and A5	3	23.1	14.8
A4	1	7.7	n/a
Vacant	3	23.1	11.4
Total	**13**	**100.0**	**100.0**

Source: NLP (Mar 09)
** UK average relates to all retail centres surveyed by Experian Goad (Apr 09)*

4.96 The centre contains a limited range of retail and service uses. Retail facilities provided include a bakery, a small CTN unit, a public house, a hairdresser and two take-away units. In addition it contains the Fudge Factory tourist attraction, which includes a shop and café.

4.97 The environmental quality of Shawforth/Facit is variable. The centre is located along Market Street which is a busy vehicular route. This presents a hazard to pedestrians when trying to cross the road and adds noise and pollution into the centre. The quality of occupied units is generally reasonable, although some of the vacant units are of poor quality.

4.98 Free on-street parking is available in the centre together with limited off-street parking. The Fudge Factory contains a dedicated car park for customers/visitors.

Stacksteads Local Centre

4.99 Table 4.21 below provides details of the range of retail and service units present in Stacksteads Local Centre derived from a site survey undertaken by NLP in March 2009. These are compared to the Goad national average and the previous 2004 health-check survey results. A plan of the area surveyed is included at Appendix D.

Table 4.21 Stacksteads Local Centre Use Class Mix by Unit

Type of Unit	Number of Units		Proportion of Total Number of Units (%)	
	2009	2004[1]	Stacksteads (2009)	National Average*
Comparison Retail	5	9	13.5	44.0
Convenience Retail	6	6	16.2	9.5
A1 Services	6	3	16.2	11.4
A2 Services	4	0	10.8	8.8
A3 and A5	6	6	16.2	14.8
A4	3	n/a	8.1	n/a
Vacant	7	15	18.9	11.4
Total	**37**	**39**	**100.0**	**100.0**

Source: NLP (Nov 08 and Mar 09)
** UK average relates to all retail centres surveyed by Experian Goad (Apr 09)*
[1] N.B at the time of the 2005 RTCS the Use Classes Order did not include A4 or A5 uses

4.100 Stacksteads contained 37 retail/service units at March 2009. This is slightly lower than the 39 units recorded at 2004, which may be the result of retail units having been converted into dwellings and/or other uses over the period. Stacksteads is a linear centre located along the Newchurch Road (the A681). There are residential units interspersed between retail/ service uses.

4.101 There were 5 comparison units in Stacksteads at March 2009, which equates to 13.5% of all units compared to the national average of 44.0%. Comparison retailers present in the centre comprise a chemist, a kitchen and bedroom shop, a carpet retailer, a spectacle shop and a sewing machine shop. There were 9 comparison retailers in the centre at 2004, showing a decline of 4 units (44%) over the intervening period.

4.102 Convenience retail units account for 6 units in 2009 which represents 16.2% of all units compared to a national average of 9.5%. These retailers include a Bargain Booze off-licence, a bakery, a butcher and three CTN units. The number of units in use for convenience retail purposes has remained the same at 2004 and 2009.

4.103 There were six units in A1 service use in Stacksteads at the time of the NLP survey, which include a number of hairdressers and a Post Office. This sector has increased by 3 units since 2004. Stacksteads contains four units in A2 service use at 2009.

4.104 Stacksteads provides a total of 9 units in A3 and A5 service use. These uses occupy 24.1% of available units which is higher than the national average.

4.105 There are seven vacant retail/ service units in the centre which cumulatively occupy 18.9% of all units in Stacksteads, which is significantly higher than the national average of 11.4%. These vacancies are located throughout the centre. Over the 2004 to 2009 period the number of recorded vacant units in the centre has declined significantly by 8 units (or 53%).

4.106 There is a large surface level car park provided in Stacksteads situated off Newchurch Road, with on-street parking provided elsewhere in the centre. Bus services operate through the centre connecting to Bacup, Waterfoot and Rawtenstall amongst other destinations. The busy nature of Newchurch Road which contains heavy and sometimes fast-moving vehicles presents a barrier to pedestrian movement.

4.107 Environmental quality of occupied units in Stacksteads is variable, with some being well maintained and others of poorer quality. The busy nature of Newchurch Road also creates issues of noise, fumes and pollution with detracts from the overall shopping environment.

Conclusion

4.108 This section has examined the vitality and viability of the defined town and local centres in Rossendale Borough. A summary of the health-check results in terms of the diversity of uses present in each centre is contained in this report at Appendix E.

5.0 QUANTITATIVE SCOPE FOR RETAIL DEVELOPMENT

Introduction

5.1 This section assesses the quantitative scope for new retail floorspace in Rossendale during the period from 2008 to 2024. It sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping.

5.2 All monetary values expressed in this analysis are at 2007 prices unless stated otherwise.

Methodology and Data

5.3 The quantitative analysis is based on a study area defined for the four main shopping centres within the Borough. The study area has been divided into four zones or sectors for more detailed analysis.

5.4 The study area is shown at Appendix A and is the same study area adopted in the 2005 RTCS. The extent of the study area is based on postcode area boundaries and the proximity of the major competing shopping destinations, i.e. Manchester, Blackburn, Bolton, Burnley, Bury and Rochdale. Shopping facilities within the study area are expected to attract most of their trade from residents within the study area, although there will be an element of trade drawn from beyond this area.

5.5 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for the year 2007 have been obtained.

5.6 Experian's EBS (Experian Business Strategies) national expenditure information has been used to forecast expenditure within the study area in the short term (2007 to 2011). Unlike previous expenditure growth rates provided by The Data Consultancy (formerly URPI), which were based on past trends, Experian's projections are based on an econometric model of disaggregated consumer spending. This model takes a number of macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of disaggregated consumer spending volumes, prices and value. The model incorporates assumptions about income and price elasticities.

5.7 For longer term projections Experian's ultra long term growth rate has been adopted (0.7% for convenience goods and 4.6% for comparison) to project expenditure between 2011 to 2016 and beyond. We believe the Experian's lower EBS growth rates reflect the current economic downturn and provide an appropriate growth rate for the short term. In the longer term it is more difficult to forecast year on year changes in expenditure, and in our view past trend line growth rates provide the most appropriate average growth rate and the potential post recession recovery.

5.8 To assess the capacity for new retail floorspace, penetration rates are estimated for shopping facilities within the study area. The assessment of penetration rates are based on a range of factors, but primarily information gathered through the 2008 household survey.

5.9 For convenience shops, the turnover estimates derived are compared to average company benchmark or average sales floorspace densities derived from Verdict information and Mintel's Retail Rankings 2008, which provides an indication of how individual retail units and centres are performing against expected turnover averages. This allows the identification of potential surplus or deficit capacity for retail sales floorspace.

5.10 In terms of comparison shops, these are assumed to trade at benchmark levels at 2008 and the capacity/deficit comparison floorspace is derived by comparing the expected turnover of existing comparison floorspace, together with committed retail development, against the expenditure available for comparison goods facilities in the Borough derived from estimated penetration rates and the expected level of expenditure inflow. This is consistent with the approach adopted in the RTCS 2005.

Population and Spending

5.11 The study area population for 2008 to 2024 is set out in Table 1F in Appendix F. Mid-year population estimates have been used for the 2001 to 2006 period based on Lancashire County Council and Bury MBC data, which is allocated on a proportional basis depending on the proportion of each postcode sector that falls within Rossendale, Hyndburn and Bury local authority areas. From 2006 onwards, population projections are based on ONS 2006 data. As these are projections rather than forecasts, they are based on the anticipated natural increase in the current population only and do not account for planned development such as house-building or economic growth. On this basis, the population within the study area is expected to increase by around 8.4% between 2008 and 2024, or by 7,961 people. Table 2F in the Appendix G sets out the forecast growth in spending per head for convenience goods within each zone in the study area. Comparison forecasts of per capita spending are shown in Table 1G.

5.12 The levels of available spending are derived by combining the population in Table 1F and per capita spending figures in Tables 2F and 1G. For both comparison and convenience spending, a reduction has been made for special forms of trading (SFT) such as mail order, e-tail (non-retail businesses) and vending machines.

5.13 Special Forms of Trading (SFT) and non-store activity is included within Experian's Goods Based Expenditure (GBE) estimates. "Special forms of trading" includes other forms of retail expenditure not spent in shops e.g. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling. SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship to the demand for retail floorspace. The growth in home computing, Internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. Experian provides projections for special forms of trading and E-tailing (Retail Planner Briefing Note 6.0 – October 2008).

5.14 This Experian information suggests that non-store retail sales in 2008 is:

- 5.9% of convenience goods expenditure; and
- 11.3% of comparison goods expenditure.

5.15 Experian predicts that these figures will increase to 8.1% and 13.9% by 2016. For convenience expenditure 5.8% of the 5.9% non-store retailing is estimated to be E-tailing, and the remaining 0.1% is other forms of SFT e.g. mail order. E-tailing in 2004 was broken down into E-tailing through retail businesses (e.g. Tesco and Sainsbury) at 1.1% and non-retail businesses (those without a physical presence on the high street) at 0.5%. The E-tailing split for retail and non-retail businesses was approximately 70:30 in 2004.

5.16 For comparison expenditure in 2008, 9.1% of the 11.3% is estimated to be E-tailing, and the rest (2.2%) is other forms of SFT e.g. mail order. E-tailing through retail businesses (e.g. Next and Argos) was 1.3% and for non-retail businesses 1.8% (e.g. Amazon) in 2004. The E-tailing split for retail and non-retail businesses was approximately 40:60 in 2004.

5.17 Experian provide projections for E-tailing and other SFT. These projections have been used to exclude expenditure attributed to e-tailing through non-retail businesses, which will not directly impact on the demand for retail floorspace. Based on Experian data SFT (including non-retail e-tailing but excluding e-tail through retail businesses) is 1.8% and 7.7% of total convenience and comparison goods expenditure respectively in 2008. The projections provided by Experian suggest that these percentages could increase to 2.8% and 8.9% by 2016. The amount of e-tail expenditure through non-retail businesses is expected to increase significantly in proportional terms, but as a proportion of total expenditure this sector is expected to remain relatively insignificant for the foreseeable future.

5.18 Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the Internet. Trends within this sector may well have implications for retailing. Therefore, it will be necessary to carefully monitor the growth within this sector particularly in the long term and the effect that it may have on diverting expenditure that might otherwise be spent in shops.

5.19 In broad terms, home/electronic shopping from non-retail businesses is classified by Experian as “special forms of trading”, as mentioned previously, this includes other forms of retail expenditure not spent in shops e.g. mail order. Special forms of trading have been excluded from the quantitative capacity analysis within this study because this expenditure does not affect the need for retail floorspace. The growth in home computing, Internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. This study makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future in order to review future policies and development allocations.

5.20 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains a small percentage of total retail expenditure. Recent trends suggest continued strong growth in this sector.

However, there is still uncertainty about its longer-term prospects. Experian's figures suggest that the growth in e-tailing has to a certain extent been at the expense of other forms of home shopping such as catalogue and mail order shopping.

5.21 The implications on the demand for retail space are unclear. For example, some retailers operate on-line sales from their traditional retail premises e.g. food store operators. Therefore, growth in on-line sales may not always mean there is a reduction in the need for retail floorspace. Given the uncertainties relating to internet shopping and the likelihood that it will increase in proportional terms, this assessment has adopted relatively cautious growth projections for retail expenditure.

5.22 As a consequence of the forecast growth in population and per capita spending, convenience goods spending within the study area is forecast to increase by 17.0% (£26.04 million) from £152.75 million in 2008 to £178.79 million in 2024, as shown in Table 3F.

5.23 Comparison goods spending is forecast to increase by 86.6% (£223.73 million) from £258.27 million in 2008 to £482.00 million in 2024, as shown in Table 2G. These figures relate to real growth and exclude inflation. These figures are lower than anticipated in the 2005 RCTS because actual growth in comparison goods expenditure between 2003 and 2007 has been lower than previously forecast.

Existing Retail Floorspace

5.24 Floorspace figures have been updated based on the Goad town centre surveys, as updated by NLP, NLP site surveys for centres not surveyed by Goad and the latest IGD food store directory.

5.25 Existing convenience goods retail sales floorspace in the Borough is estimated to be 13,463 sqm net as set out in Table 1A, Appendix A. This floorspace figure excludes comparison sales floorspace within food stores (estimated to be 5,368 sqm net).

5.26 Comparison goods retail floorspace within the defined centres which incorporates comparison goods sales floorspace in food stores and that contained within the out-of-centre Tesco at Syke Side, is set out in Tables 2A, Appendix A. Total identified comparison sales floorspace in the Borough is estimated to be 18,027 sqm net.

Existing Spending Patterns 2008

Convenience Shopping

5.27 The results of the household survey undertaken by NEMS Market Research (November 2008) have been used to estimate existing shopping patterns within the study area. The estimates of market share or penetration within each study area zone are shown in Table 4F, Appendix F.

5.28 The level of convenience goods expenditure attracted to shops/stores in Rossendale at 2008 is estimated at £105.30 million as shown in Table 5F, Appendix F. Convenience stores/ shops in the Borough are estimated to attract £4.63 million from beyond the study area.

5.29 Company average turnover to sales floorspace densities are available for major food store operators. Company average sales densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the sales area of the large food stores listed in Table 1A, Appendix A, and a benchmark turnover for each store has been calculated. This turnover is not necessarily the actual turnover of the food store, but it provides a helpful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms. Estimates for comparison sales floorspace within large food stores has been deducted from the figures in Table 1A, for consistency with the use of goods based expenditure figures.

5.30 Average sales densities are not widely available for small convenience shops, particularly independent retailers. We have assumed an average of £3,500 per sqm net for smaller convenience shops within the defined centres. The total convenience goods benchmark turnover of all identified food stores/convenience shops is estimated to be £133.05 million in 2008, as shown in Table 1A, Appendix A. As noted above, our assessment suggests that existing shops/stores in 2008 have a combined turnover of £105.30 million, which suggests that existing convenience sales floorspace is trading below the expected benchmark at 2008 by approximately 21% (or £27.75 million). The estimates of available expenditure are summarised and compared with the benchmark turnover in Table 5.1.

Table 5.1: Convenience Trading Levels in 2008 (£ millions)

Area	Actual Turnover	Benchmark Turnover	Difference
Rawtenstall	63.44	73.14	-9.70
Bacup	6.91	5.41	+1.50
Haslingden	4.35	4.74	-0.39
Waterfoot	2.65	2.92	-0.27
Local Centres	2.94	6.42	-3.48
Other Rossendale	25.01	40.42	-15.41
TOTAL	**105.30**	**133.05**	**-27.75**

Source: Table 1A (Appendix A) and Table 5F (Appendix F)

Comparison Shopping

5.31 The estimated comparison goods expenditure currently attracted by shopping facilities within the Borough is £63.54 million in 2008, as shown in Table 3G, Appendix G.

5.32 Rossendale's market share of total comparison goods expenditure generated within the study area is 23%, and 77% is attracted to destinations outside of the Borough, predominantly to facilities in Bury (23%), Manchester (11%) and Burnley (9%). Similarly to convenience goods shopping, the retention rates of comparison goods expenditure varies across the study area. The level of retention of comparison goods in Rossendale at 2008 (23%) is slightly higher than that recorded in the 2005 RTCS.

5.33 Mintel's Retail Rankings 2008 provides company average sales density information for a selection of national retailers. This data suggests a notional average sales density for national comparison retailers (£5,220 per sqm). Based on our recent experience across the country average sales densities for comparison floorspace can range from £2,000 to £7,000 per sqm net. The higher end of this range is usually only achieved by very successful shopping centres. Our assessment suggests comparison goods expenditure available for comparison floorspace in the Borough at 2008 is £63.54 million. Table 5.2 shows the available expenditure in 2008 for the four towns and the local centres in the Borough.

Table 5.2: Defined Centres Comparison Goods Trading Levels, 2008

Centre	Actual Turnover(£m)
Rawtenstall	£46.45
Bacup	£3.61
Haslingden (including Tesco, Syke Side)	£10.44
Waterfoot	£1.33
Local Centres	£1.70
Total Turnover	**£63.54**

5.34 There is an estimated 18,027 sqm net of existing comparison floorspace located in the Borough. When applied to the estimated turnover at 2008 this equates to an average turnover sales density of £3,525 per sqm net. On the basis of the above, comparison facilities in Rossendale are trading towards the middle and the lower end of the range of sales densities. On balance shopping facilities within the Borough appear to be trading satisfactorily in light of their position in the shopping hierarchy and their rural nature. However, there is scope for existing facilities to increase their turnover efficiency in the future.

Quantitative Capacity for Additional Convenience Floorspace

5.35 The levels of available convenience goods expenditure in 2013, 2018 and 2024 are shown in Tables 6F, 7F and 8F in Appendix F, and summarised in Table 9F. These tables assume that the market penetration rates within the study area will remain unchanged in the future.

5.36 When considering capacity for additional floorspace, it is also necessary to factor in any committed convenience retail development. Table 3A at Appendix A identifies the following three convenience retail commitments/ proposals in Rossendale (N.B. 'proposals' in this instance and through the rest of the report refer to planning proposals with a resolution to grant planning permission):

- Aldi, New Hall Hey (Unit B1). 1,656 sqm gross/1,076 sq.m net floorspace, of which 818 sqm net is convenience floorspace;
- Lidl, Bus Depot, 35 Bacup Road. 1,308 sqm gross/913 sq.m net floorspace, of which 739 sqm net is convenience floorspace. Although this is now trading, at the time of the household survey it was still under construction and therefore for the purposes this assessment it is included as a commitment;
- Foodstore, former Horaces Club, Lee Road, Bacup. 2,946 sqm gross/1,579 sq.m net floorspace, of which 1,232 sqm convenience floorspace.

5.37 The only commitment is the Lidl store, as the other two proposals have resolutions to grant planning permission subject to the signing of a Section 106 Agreement.

5.38 Any predictions about growth beyond 2013 should be treated with a high degree of caution. This is because it is very difficult to predict how the retail landscape will change over the period to 2024, and this will affect future need and capacity, as will the levels of population and expenditure growth that actually occur. As such, it is essential that the need/capacity for retail floorspace is assessed at regular intervals and at least once every five years. Forecast need/capacity for retail floorspace in the medium and long-term is not sufficient justification to support new retail floorspace in the period to 2013, and the medium and long-term floorspace estimates should be viewed as indicative only.

5.39 The total level of convenience goods expenditure available for shops in the Borough between 2008 and 2024 is summarised in Table 5.3. The benchmark turnover of existing convenience floorspace and the estimated turnover of committed/proposed convenience development have been subtracted from the estimates of available expenditure to provide deficit/ surplus expenditure estimates, as shown in Table 9F, Appendix F.

5.40 Table 9F and Table 5.3 below assume that the benchmark turnover of convenience floorspace will not increase between 2009 to 2011 due to the recession and limited projected expenditure growth. In the longer term existing floorspace within the District is expected to increase its benchmark turnover in real terms. A growth rate of 0.3% per annum is adopted, which we believe is realistic if an expenditure growth rate of 0.7% per annum is achieved.

5.41 At 2013 available expenditure is projected to be significantly lower than the anticipated benchmark turnover of existing and committed/ proposed convenience floorspace (£150.09 million) by £42.04 million, as shown in Table 9F, Appendix F and replicated in Table 5.3 below. On the basis of this global deficit, there is no requirement for additional convenience floorspace at 2013 assuming that all commitments/ proposals are implemented. Although this deficit is expected to decline year on year to £37.94 million at 2018 and £31.90 million at 2024, there remains no global capacity for additional convenience floorspace in the Borough over the 2008 to 2024 period.

5.42 The relatively high level of undertrading suggests that the recent large-format foodstore developments have led to an oversupply of convenience floorspace in Rossendale.

Table 5.3: Convenience Goods Floorspace Projections (£m)

	2008 - 2013	2008 - 2018	2008 - 2024
Surplus Expenditure £M			
Rawtenstall	-13.50	-10.85	-6.98
Bacup	-9.56	-9.39	-9.12
Haslingden	-0.30	-0.12	-0.15
Waterfoot	-0.22	-0.10	-0.06
Local Centres	-3.43	-3.35	-3.22
Other Rossendale	-15.02	-14.12	-12.80
Total	**-42.04**	**-37.94**	**-31.90**

Source: Table 9F Appendix F

Quantitative Capacity for Additional Comparison Floorspace

Comparison Shopping

5.43 As noted above, the current market share of comparison floorspace within Rossendale is around 23%, which is a slight increase compared with the 2005 RTCS. This reflects the fact that the comparison goods element of new food stores (two Tesco and an Asda store) has increased market share, although the loss of retailers from the Valley Centre has, to some extent, restricted this increase.

5.44 In order to estimate the capacity for additional comparison goods in Rossendale, we assumed that the market share of comparison goods facilities in Rossendale could increase to 33% by 2013 and remain at this level thereafter. We consider this to be realistic given that at the current time most of the units in the Valley Centre in Rawtenstall are vacant and consequently the market share that it achieves is artificially low as some residents will shop outside of the Borough in order to purchase comparison goods. It is likely that if and when this site comes forward for redevelopment for comparison retail floorspace, the market share of Rawtenstall will increase significantly as a result. In addition, if the committed development at New Hall Hey commences trading, this is also likely to attract some shoppers who currently use facilities in neighbouring authorities.

5.45 An aspirational market share of 33% is consistent with the assumed market share used in the 2005 RTCS. The 2005 RTCS assumed that by 2008 this level of uplift could be achieved. This acknowledged the position of Rawtenstall in the retail hierarchy within the sub region and took into account the need to ensure there would be no significant adverse impact on existing shopping facilities within and surrounding the Borough.

5.46 In order to estimate capacity, anticipated available expenditure is compared within the estimated turnover of existing facilities and commitments.

5.47 We have assumed that the turnover of comparison floorspace will not increase in real terms between 2009 to 2011 due to the recession and limited projected expenditure growth. In the longer term existing floorspace within the Borough is expected to increase turnover efficiency. A growth rate of 2% per annum is adopted, which we believe is realistic if an expenditure growth rate of 4.6% per annum is achieved. Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of spending growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio.

5.48 An allowance for the following commitments/proposals (planning applications with a resolution to grant planning permission) and their estimated turnover (shown in Table 3A at Appendix A) has been made. These commitments/proposals are:

- Land at New Hall Hey, Rawtenstall has extant planning permission for a Homebase (3,995 sqm gross), a Pets at Home (697 sqm gross) and an Argos (697 sqm gross).
- An amended planning application was submitted in March 2009 relating to the Valley Centre, Rawtenstall, which proposes 6,845 sq.m gross/ 4,792 sqm net retail floorspace. We understand that a resubmitted planning application relating to the Valley Centre is imminent although no details on the implications of this on the proposed retail floorspace is available.
- An allowance for the estimated proportion of comparison goods floorspace that will be provided within the proposed Aldi foodstore in Rawtenstall, which is awaiting the completion of a Section 106 agreement, the Lidl foodstore in Rawtenstall which has now commenced trading but was under construction at the time of the household survey, and the foodstore at Bacup which has a resolution to grant planning permission but is awaiting the signing of a Section 106 agreement.

Comparison Goods Capacity based on Increased Market Share

5.49 As indicated above, the scenario we have adopted assumes that the market share of comparison goods floorspace in the Borough will increase to 33% at 2013, 2018 and 2024. Table 7G at Appendix G compares the forecast expenditure to the projected increase in market share on a Borough-wide basis. Once commitments and proposals (with a resolution to grant planning permission) are taken into consideration, any deficit/ surplus expenditure is converted into an estimated floorspace requirement based on an assumed sales density of £4,000 per sq.m grown by 2% floorspace efficiency per annum beyond 2011. These results are replicated in Table 5.4 below.

Table 5.4: Comparison Goods Floorspace Projections

	2013	2018	2024
Available Expenditure (£m)	95.70	122.92	166.28
Turnover of Existing Floorspace (£m)	66.10	72.99	82.19
Turnover of Commitments (£m)	35.58	39.28	44.24
Surplus/ Deficit Expenditure (£m)	-5.98	10.65	39.84
Sales Density for New Floorspace (£/sqm)	4,162	4,595	5,174
Sales Floorspace (sqm net)	-1,438	2,317	7,700
Gross Floorspace (sqm gross)	-1,917	3,090	10,267

Source: Table 8G Appendix G

5.50 As Table 5.4 indicates, if the market share of facilities in the Borough increases to 33% and all the committed/ proposed developments come forward, there will be remain an over-supply of comparison goods floorspace at 2013. However in the medium term (to 2018) and long-term (2024) capacity increases to some £10.65m and £39.84m respectively. This could equate to a need for up to 3,090 sqm (gross) floorspace at 2018 and 10,267 sqm (gross) to 2024. These are broad guidelines only and will be dependent upon the type of comparison retailer, for example a warehouse-type operator will have a significantly lower sales density compared to an electrical retailer.

5.51 The above capacity projections are based on the assumption that all committed and proposed developments will come forward by 2013. Should some of these not be implemented within this timeframe, then there will be scope for additional comparison goods floorspace over the period to 2013.

5.52 We note that there is uncertainty regarding the New Hall Hey commitment. Although part of this development comprising the application for three retail units (LPA ref: 2007/030) has been partially implemented, construction of these units has now ceased. If this site does not come forward it will release additional comparison floorspace capacity which could be directed towards Rawtenstall Town Centre. Notwithstanding this, the permission comprises a part implemented consent and therefore there is no time-limit for its development. Parts of the wider New Hall Hey site may become available if the extant permissions are not implemented although given their out-of-centre location this may be more suitable for alternative employment uses.

5.53 We recognise that the potential retail operators of the retail units at New Hall Hey that were named in the original planning application may not occupy the units, if they are completed. We note that Units 1A and 1B are restricted by Condition 3 of the planning permission to selling *'home improvement and garden related products, furniture, floor coverings, soft furnishings, electrical products, household goods, pets, pet food and pet supplies and other goods ancillary to or directly associated with these goods'*. Unit 3A is subject to a restriction through Condition 4 which specifically states that the sale of clothing (other than items normally associated with DIY tasks or if sold by a catalogue retailer) is prohibited. If developed, these retail units would be suited to bulky goods comparison operators who require large format units.

6.0 THE NEED FOR COMMERCIAL LEISURE DEVELOPMENT

Introduction

6.1 This section assesses the need and potential for commercial leisure development in Rossendale, and provides an update of Section 11.0 of the 2005 RTCS. It considers the potential for improving a range of commercial leisure uses including; cinema/ multiplex, ten pin bowling, bingo, nightclubs, private health and fitness clubs and catering, pubs and bars.

Commercial Leisure Trends

6.2 The demand for commercial leisure facilities has increased significantly during the last 20 years. The growth in the commercial leisure sector was particularly strong during the late 1980s and again in the mid 1990s. Average household expenditure on leisure services increased in real terms by 93% between 1984 and 1995 (source: Family Expenditure Survey). Average household expenditure on leisure services increased by a further 53% between 1995 and 2005. The latest (2006) average household expenditure on leisure services is nearly £3,500 per annum. However, many analysts consider that the commercial leisure market has now reached saturation in some sub-sectors.

6.3 The mid-1990s saw the expansion of major *leisure parks.* These leisure parks are generally anchored by a large multiplex cinema and offer other facilities such as ten-pin bowling, bingo, nightclubs, health/fitness clubs, themed destination restaurants, pub/restaurants, children's nurseries and budget hotels. Commercial leisure facilities have typically been located on the edge of town centres or out-of-centre, with good road access. Many leisure uses have also emerged on retail warehouse parks. Examples of major leisure parks are available in Blackburn, Bury and Manchester.

6.4 The cinema market remains an important sector because cinemas often anchor leisure developments, providing footfall for other uses. However, growth in this sector has slowed significantly in recent years with many areas reaching saturation levels. Many cinema operators have suspended or curtailed their expansion plans. Some cinema operators such as City Screen, Mainline Pictures and Reeltime Cinemas have opened new or taken over small cinemas in recent years. The expansion of other sectors has slowed, including ten-pin bowling and bingo. However, other sub-sectors have remained strong in recent years, in particular the private health and fitness market, with a number of multiple operators seeking premises across the UK, e.g. LA Fitness, Fitness First and Esporta. Nevertheless, the health and fitness sector is also reaching saturation point in some areas and is likely to be affected by the current down turn in the economy.

The Potential for Leisure and Entertainment Uses

Catchment Potential

6.5 In general, commercial leisure facilities will draw the main part of their trade from residents within a 20 minutes drive time. Therefore residents in Rossendale live within the catchment area of major leisure facilities in larger centres surrounding the Borough.

6.6 Major leisure facilities such as multiplex cinemas, ten-pin bowling centres, ice rinks and family entertainment centres require a large catchment population, and often benefit from locating together on large out of centre leisure parks.

6.7 Rossendale has a reasonable potential catchment population. The study area has about 94,500 people at 2008 (the study area includes population outside the Borough including Ramsbottom). However, this study area population falls within the catchment areas of other larger towns. The study area population have good access to leisure facilities in larger towns, such as Manchester, Burnley, Bury and Accrington. The proximity of leisure facilities in these surrounding large towns will limit the catchment area and potential for major leisure facilities within Rossendale.

6.8 Residents in the Haslingden zone have access to facilities in Accrington and Bury and residents in the Rawtenstall/ Waterfoot zone have access to facilities in Burnley. Residents in the Bacup zone have access to facilities in Burnley and Rochdale and in the Ramsbottom zone residents have good access to facilities in Bury.

The Cinema Market

6.9 Cinema admissions in the UK declined steadily during the 1950's, 1960's and 1970's, a period when the ownership of televisions increased significantly. Cinema admissions continued to decline in the early 1980's, but increased steadily after 1984 up to 2002. There was a peak in cinema admissions in 2002 at 175.9 million.

The cinema industry reached a plateau in 2005 following a slight recovery in 2004 with a net gain of 24 operating screens (still a virtual standstill compared to the 100-200 screens added at the turn of the decade). Total admissions in 2006 were 157 million, slightly lower than in 2005 (164.6 million) and significantly lower than in 2004 (171.3 million, 2.86 visits per person).

6.10 As the industry is now dominated by three main operators (Odeon, Cineworld and Vue), the emphasis is shifting from consolidation to physical expansion. This is the same for their two smaller rivals, The Showcase owned by National Amusements and the Ward Anderson group of companies which own Empire. Multiplex cinemas now dominate the market with over 70% of available screens in 2006.

6.11 Cinemagoing forecast that total admissions would increase by about 10% between 2005 and 2009, an average growth rate of 2.5% per annum. Forecasts anticipated a net addition of 110 screens in 2006, 120 in 2007, 60 in 2008 and 60 in 2009. Compared to the last decade these figures represent a considerable slowing of growth, 2% compared to past growth of 5.5%.

6.12 Further to this, Cinemagoing forecast that by 2011 more than 300 screens will be added to the 3,440 operating in 2006. According to predictions in Cinemagoing, British cinema-goers will pay nearly £1.1 billion for cinema tickets in 2011; this is due to a strong upcoming film product, benefits from digital projection and a turn in the investment cycle to new cinemas.

6.13 There is no commercial cinema provision within Rossendale, although film screenings are held at Whitworth Civic Hall. However, large centres surrounding the Borough have a good provision of multiplex cinemas. The nearest cinemas are in Accrington (Vue Cinema), Blackburn (Vue Cinema), Bolton (Cineworld), Bury (Vue Cinema) Burnley (Apollo), Manchester (AMC, Odeon, Cornerhouse, Showcase, UCI) and Rochdale (Odeon). The potential for additional cinema development in Rossendale will be restricted by the proximity of these major multiplexes.

6.14 The household survey indicates that 50.6% of respondents visit the cinema. To assess the demand for cinema admissions within the study area, we have assumed that Rossendale could retain all of the cinema trips made by residents of the study area who visit the cinema. The catchment population who undertake cinema trips has been converted into a total number of cinema admissions per annum based on the national visitation rate (2.6 per person in 2006). Visitation rates have been projected based on a 2% growth rate per annum. The total number of cinema admissions has been converted into an optimum number of cinema seats, based on Dodona figures (300 visits per annum per seat). The results are shown in Tables 6.1 below.

Table 6.1 Cinema Potential in Rossendale

	2008	**2013**	**2018**
Catchment Population* Visits Per Annum	47,836 2.70	48,953 2.99	50,223 3.30
Total Visits Per Annum	**129,157**	**146,369**	**165,736**
Optimum Visits Per Screen Optimum Visits Per Seat	75,000 300	75,000 300	75,000 300
Screen Potential **Seat Potential**	1.7 431	2.0 488	2.2 552

** Comprises those respondents of the study area visit the cinema*

6.15 The analysis suggests there is modest capacity for 1.7 cinema screens (431 seats) in Rossendale at 2008, which rises to 2.2 screens (552 seats) by 2018, based on maintaining a constant study area market share of 50.2%. It should be noted that this is an optimistic scenario, given that even if cinema facilities were available in the Borough, it would not retain all of the trips and leakage to other destinations would still occur.

Private Health and Fitness Clubs

6.16 The UK health club market expanded rapidly as public awareness about personal fitness has increased. Business in Sport and Leisure (BISL) 2008 indicates healthy growth across the industry with the Fitness Industry Report stating that by the end of March 2007, there were 5,714 combined public and private sector fitness sites across the UK, 3,117 private clubs and 2,597 gyms within public sports centres. Since 2006, 232 new facilities had opened. The total number of UK health and fitness members at public gyms and private health clubs is now over 7 million.

6.17 Nearly 12% of the population are now members of a private health club or registered users of a leisure centre gym in the UK, compared with just 8.9% in 2002 and this growth looks set to continue. An estimated 7.3% of the population being members of private clubs at March 2007, up from 7.2% since January 2006. However, the UK is still below the USA where the fitness membership rate is 15.6%.

6.18 Private health clubs in the UK range from small independent clubs to large operators such as Cannons, David Lloyd, Esporta, Fitness First, Virgin Active, Bannatyne and LA Fitness.

6.19 Private health clubs had 4.2 million members in 2007 (1,375 members per club). The largest health clubs can have memberships of approximately 4,000 people. However, independent clubs remain a strong presence in the private sector market running 55% of all private clubs. Of the 126 new private health clubs that have opened since January 2006, 58% were independent clubs and 42% were owned by multiple operators. Public sector sports centres are also important, and the market increased significantly between January 2006 and March 2007, with 106 new facilities opened and in terms of like-for-like membership growth rates, the sector saw an impressive 4.6% growth.

6.20 There are five private health and fitness clubs in Rossendale, as follows:

- The Body Temple Gym, Unit 6, Burnley Road East, Rawtenstall;
- Energee Fitness Suite, Holden Café Conference Centre, Holcombe Road, Rawtenstall;
- Fearnes Gym, Stacksteads;
- Body & Fitness, The Church, Haslingden;
- T1 Health & Fitness Club, Leech Road, Waterfoot.

6.21 None of the large national operators is represented in Rossendale. In addition to the private leisure facilities there are several local authority owned/subsidised sports facilities to which the public has access including:

- Alder Grange, Calder Road, Rawtenstall;
- Bacup Leisure Hall, Burnley Road, Bacup;
- Haslingden Leisure Centre, Helmshore Road, Haslingden;
- Whitworth Leisure Centre.

6.22 The population of the study area is approximately 94,500 in 2008, which would generate demand for about 11,340 public and private membership places, based on the national average membership rate (12%) or 14,742 based on the US rate (15.6%). The household survey indicates that 22.4% of respondents or their families visit health/fitness clubs. Of these, 48.6% did so at destinations within Rossendale. It should be noted that not all members of the household will participate and not all households will be members of clubs, and therefore the membership rate in Rossendale will be much less than 22.4%.

6.23 The 9 private/public gyms or health clubs in Rossendale, assuming an average membership of 1,375 per club, could accommodate about 12,375 members. On this basis there is no requirement for further private health and fitness clubs in the Borough at the current time. A future increase in membership rates and population growth could generate additional demand.

6.24 Notwithstanding the above, we note that planning permission was approved in December 2007 for the development of a health and fitness club on land at the former Kwik Save, New Hall Hey Road, Rawtenstall. This has yet to be implemented.

Tenpin Bowling

6.25 Tenpin bowling grew rapidly in the UK in the 1960's. However, the complex scoring system, lack of investment and the deterioration exacerbated a significant decline in the 1970's. However, a resurgence of interest in tenpin bowling during the late 1980's and computer scoring led to a second boom. There were 280 tenpin bowling centres (5,600 lanes) in the UK in 2004, approximately one lane per 10,000 people. The tenpin bowling sector experienced steady growth in the late 1990's, with a 27% growth in spending during the last 10 years, although any real growth was mostly in the past four years. Mintel predicted the value of the tenpin bowling market would increase from £245 million in 2002 to £324 million by 2007.

6.26 Bowling centres now tend to be part of major leisure developments that include multiplex cinemas, restaurants and nightclubs offering a choice of leisure and entertainment activities.

6.27 Tenpin bowling centres require large buildings of between 2,300 to 4,200 sqm (25,000 to 45,000 sq ft) and are generally located in towns with a population of over 150,000 people.

6.28 Rossendale has no tenpin bowling facilities, and the catchment population is significantly below 150,000 people. The nearest tenpin bowling facilities are located in Bury (Tenpin), Accrington (Accrington Superbowl), Rochdale (Strike Ten Bowl) and Burnley (AMF Bowling). The household survey indicates that 22.3% of residents in the study area undertake tenpin bowling as a leisure activity.

6.29 There appears to be modest scope for a ten pin bowling facility in the Borough based on the size of the catchment population. On the basis of 94,500 people residing in the study area, Rossendale could accommodate up to 9 bowling lanes, although it is not clear whether a commercial operator would be willing to develop a tenpin bowling facility of this size in the Borough.

6.30 We note that part of the approved retail/leisure scheme at New Hall Hay includes a tenpin bowling alley, although this has yet to be implemented. It is not clear whether this commitment will come forward given the uncertainty surrounding the development of the site, and if it is not developed this could create capacity for a similar facility elsewhere in the Borough, with Rawtenstall being the most likely location. We have undertaken a canvas of national ten pin bowling operators and at the current time there are no active requirements for floorspace in Rawtenstall. Notwithstanding this there may be interest from an independent operator to operate a ten pin bowling facility in the Borough.

Bingo

6.31 The bingo market peaked in the mid-1970s, with almost 2,000 clubs nationwide. Since then the sector has struggled to compete with other leisure activities, including the impact of the National Lottery. However, the decline has bottomed out and attendance figures have remained steady since the late 1990's, and revenues and profits have started to increase.

6.32 Nationally there were 676 commercial bingo clubs in 2005, but in March 2007 this decreased to 643 clubs, approximately one club per 90,000 people. The amount staked on bingo had continued to rise in previous years, but peaked in 2006 at £1,826 million and fell slightly in 2007 to £1,820 million.

6.33 Bingo clubs attracted 79 million admissions in 2005 (source: Mintel), about 1.75 admissions per adult each year. On average each club attracted 117,000 admissions in 2005 (about 2,250 admissions per week). The average participation rate (adults) was 6.9% in 2004 (source: Mintel), split 2.8% regular players and 4.1% occasional players. Mintel forecasts that admissions will decline from 79 million in 2005 to 68 million in 2010, although the average spend per head will increase from £26.90 to £38.40.

6.34 Mecca and Gala are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises (i.e. converted cinemas), into purpose built units. Bingo clubs have become increasingly sophisticated, and have actively sought to attract all age groups.

6.35 The bingo sector usually prefers central locations that are accessible by public transport and by foot. Major bingo operators, such as Mecca and Gala, require buildings of between 2,000 to 3,000 sq m, capable of seating up to 2,000 people, with a catchment population of 50,000 to 70,000 people within freestanding towns (source: BISL).

6.36 The population of the study area of working age and above (i.e. 16 years old and over) is 72,310 persons according to Experian. Given that it is a legal requirement for bingo players is 18 years old or over, using this figure to estimate capacity for additional bingo facilities will slightly over-estimate the number of persons in the study area able to support such facilities, but still provides an indicative guide to capacity. On the basis of 72,310 adults in the study area, this could generate about 126,543 admissions based on the national participation rate (1.75 per adult), compared with the average of 117,000 admissions per club. These figures suggest that Rossendale could accommodate one large-format bingo club, given that no such bingo facilities currently exist in the Borough. However, the household survey results indicate that the participation rate for bingo is low at just 3.8%. This figure may reflect the national trend in low and declining bingo admissions, partly as a consequence of the smoking ban and increasing participation in bingo activities over the internet. However, it may also be partly explained by the lack of such a facility within the Borough. In light of this, and given the provision of bingo halls in surrounding centres such as Burnley (Gala) and Rochdale (Mecca), it is not clear whether a new large-scale bingo facility in Rossendale would be commercially viable.

6.37 Notwithstanding this, there are a number of small-scale and informal bingo facilities in the Borough, which are visited by residents of the study area, for example in Haslingden (5.9%), Whitworth (5.9%), Rawtenstall (3.8%) and Waterfoot (3.8%). There may be scope to increase this type of activity and new small scale bingo facilities should be supported (in appropriate locations) should such opportunities come forward.

6.38 The canvas of national bingo operators undertaken as part of this study did not reveal any active requirements for floorspace in the Borough at the current time.

Nightclubs

6.39 The value of the nightclub market (permanent venue offering dancing in return for an admission fee) declined from £2.16 billion in 1998 to £1.77 billion in 2002 (source: Mintel - Nightclubs). There are approximately 1,700 nightclubs in the UK, approximately one per 30,000 people.

6.40 The sector has faced increasing competition from late night pubs and bars, with no admission fees. The BISL envisages a continued period of rationalisation and price competition with new challenges in the form of the smoking ban. However, the forecast trend of significant growth in the 18-24 year old age group is expected to provide a growing market.

6.41 Large nightclubs (capacity up to 2,000 people) are generally located in large towns with a population of over 100,000 people. The provision of nightclubs and live music venues, in Rossendale is limited. As such, the household survey results suggest that of the 24.5% of households in the Rossendale study area who visit nightclubs/ music venues the overwhelming majority (94.7%) do so at destinations outside the Borough and predominately in Manchester (56.8%).

6.42 Given the modest size of town centres in the Borough and the strength of nightclub/ music venues in nearby towns, it is unlikely that a large nightclub/music venue in Rossendale would be viable.

Bars and Restaurants

6.43 On average households in the UK spent over £1,100 per annum eating and drinking away from the home in 2006 (source: Family Spending 2007).

6.44 Food and drink establishments (Class A3/A4/A5) including restaurants, bars and pubs have supported other major leisure uses on leisure and retail parks. Within town centres the demand for A3/A4/A5 uses has increased including a significant expansion in the number of coffees shops, such as Starbucks, Costa Coffee and Coffee Republic.

6.45 PPS6 (paragraph 2.22) indicates that:

> *"a diversity of uses in centres makes an important contribution to their vitality and viability. Different but complementary uses, during the day and in the evening, can reinforce each other, making town centres more*

attractive to local residents, shoppers and visitors. Local planning authorities should encourage diversification of uses in the town centre as a whole, and ensure that tourism, leisure and cultural activities, which appeal to a wide range of age and social groups, are dispersed throughout the centre".

6.46 Paragraph 2.23 also indicates that planning policies should:

"encourage a range of complementary evening and night-time economy uses which appeal to a wide range of age and social groups, ensuring that provision is made where appropriate for a range of leisure, cultural and tourism activities such as cinemas, theatres, restaurants, public houses, bars, nightclubs and cafes".

6.47 National branded pub/restaurant chains have been investing heavily, although not exclusively in larger centres. Many chains such as All Bar One, JD Wetherspoons and Yates Wine Bars have sought representation in smaller centres close to residential communities.

6.48 National information available from Goad Plans indicates that the proportion of non-retail uses within town centres across the country has increased over the last decade as shown in Table 6.2. The proportion of Class A1 retail uses in Goad town centres has decreased by 12% between 1994 to 2008 (7.2 percentage points), whilst non-retail uses including Class A2, A3/A5 and non-retail (service) A1 uses have all increased.

Table 6.2: GB Goad Plan Town Centres Use Class Mix

Type of Unit	% Change 1994 to 2008	Proportion of Total Number of Units (%)			
		1994	2000	2005	2008
Class A1 (Retail)	- 11.8	61.2	59.1	56.4	54.0
Class A1 (Services)	+ 42.0	6.9	8.2	9.6	9.8
Class A2	+ 5.9	8.5	8.9	8.9	9.0
Class A3/A5*	+ 57.6	9.2	11.2	13.7	14.5
Miscellaneous	+ 30	1.0	1.4	1.4	1.3
Vacant & Under Const.	- 20	13.2	11.2	10.1	11.4
Total	**-**	**100.0**	**100.0**	**100.0**	**100.0**

Source: Goad Centre Reports **excludes Bars/Public houses (A4)*

6.49 Despite the above, the number of bars and pubs continued to decline in 2006, according to figures produced by the Department of Culture, Media and Sport and this was prior to the smoking ban. In 2006 there were 51,479 pubs and bars in England and Wales.

6.50 The Beer Orders in the early 1990's, which were acts passed by the government restricting the number of tied pubs that could be owned by large brewery groups and requiring large brewer landlords to allow a guest ale to be sourced by tenants from someone other than their landlord, saw a massive expansion of themed bar operators and pub restaurants, such as JD Wetherspoons. These outlets generally require a minimum 50,000 population and are usually located on main streets or secondary positions close to prime retail, commercial and other leisure users. There are no branches of JD Wetherspoons in Rossendale. Operators usually require large premises of 250 - 1,500 sq m, in close proximity to public car parks and good transport links.

6.51 Themed restaurants also expanded rapidly in the 1990's. These operators have located in out of centre retail/leisure parks as well as good secondary/primary high street locations. Fast food operators such as McDonalds and Burger King have expanded the number of drive through outlets, and town centre outlets. Outlets have been developed within retail/leisure parks or on busy roads. Outlets require sites of approximately 0.2 hectares. Notwithstanding this, we note that planning permission was granted in March 2008 for the development of two fast food restaurant outlets at the New Hall Hey site in Rawtenstall, which where to be occupied by KFC and Frankie and Benny's. This permission remains unimplemented. We also note that planning permission has been granted at the Heritage Arcade on Bacup Road for conversion into a complex of bars and restaurants, although this permission has yet to be implemented.

6.52 As indicated in earlier sections of this report, although the proportion of Class A3/A5 uses in Rawtenstall (10.4%) is below the national average (14.3%), representation of such uses is above the national average in the other three defined town centres of Bacup (16.0%), Haslingden (17.6%) and Waterfoot (17.3%). In terms of the smaller local centres, these would be expected to contain a higher proportion of Class A3/A5 uses and indeed the proportion of these uses in Edensfield (18.2%), Stacksteads (17.6%) and Whitworth (23.5%) is above average; however the proportion of Class A3/A5 uses in Crawshawbooth (12.9%) is below the national average.

6.53 Future town centre development eg. redevelopment of the Valley Centre in Rawtenstall should provide additional space for these uses as well as Class A1 retail. An allowance of 10% to 15% of new floorspace for Class A3 to A5 uses may be appropriate.

Evaluation of Leisure Provision in Rossendale (February 2006)

6.54 The Council commissioned PMP to undertake a strategic review of the leisure provision within the Borough, with the final report being published in February 2006. This focused on provision of indoor and outdoor sporting leisure provision in Rossendale.

6.55 Although this report is a useful informative to this assessment, it only considers Council run facilities and does not assess private health and fitness centres or the scope for private sector investment. It also does not consider the breadth of leisure sectors examined above. It should also be noted that the methodology used to inform the quantitative work by PMP study differs from that used in our assessment.

6.56 The document examines participation rates and usage of leisure facilities in Rossendale and specifically swimming pools and health and fitness facilities. It assesses the quality and state of Council-run facilities, the financial status and catchment area of each, and advises on future options for supporting and developing this provision.

6.57 The report concludes that existing Council leisure facilities are 'ageing and inadequate' (para 5.3), but that in quantitative terms the supply of leisure facilities broadly matches anticipated demand.

6.58 The report notes in terms of this type of leisure provision that

> *"No additional provision is required however there are clear quality issues and the need to look at re-development/ refurbishment issues."* (Executive Summary)

Conclusions on Commercial Leisure Facilities in Rossendale

6.59 Rossendale has a relatively limited range of commercial leisure, entertainment and cultural facilities, with residents visiting larger centres in neighbouring authorities to undertake such activities. These larger centres are likely to continue to attract leisure related trips from Rossendale. Therefore, the potential for major commercial leisure facilities within the Borough is limited.

6.60 Our assessment has indicated that there is limited scope for the provision of cinema, tenpin bowling, bingo facilities, private health and fitness clubs or nightclubs in the

Borough due to its relatively modest population and the strength of facilities in nearby larger centres. However, there is likely to be scope to provide additional restaurants/ bars.

6.61 The catchment population of Rossendale is in theory capable of supporting some commercial leisure facilities and there is potential consumer support to provide a better range of leisure and entertainment facilities within the Borough. However, the availability of a reasonable catchment population will not necessarily guarantee demand from operators, particularly in sectors that are well provided in nearby towns or performing poorly nationally, e.g. cinemas and bingo halls as evidenced by our canvas of operator responses.

6.62 We note that the approved New Hall Hey scheme includes leisure/restaurant floorspace which, if implemented, would significantly enhance the leisure offer of Rossendale. In addition we agree with the suggestions contained in the "*Evaluation of Leisure Provision in Rossendale"* report, that the Council should consolidate Council funding on existing Council owned leisure facilities in order to improve the quality of provision, if possible.

7.0 SEQUENTIAL SITES UPDATE

Floorspace Projections

7.1 There are a number of issues that may influence the future scope for new retail floorspace in Rossendale and the appropriate location for this development, as follows:

i) outstanding development commitments and proposals in competing centres;

ii) the re-occupation of vacant town centre floorspace;

iii) the reliability of long term expenditure projections, particularly after 2013;

iv) the effect of Internet/home shopping;

v) the acceptability of higher than average trading levels;

vi) the level of operator demand for floorspace in Rossendale, bearing in mind the proximity of larger centres;

vii) the likelihood that Rossendale's existing retention of expenditure will change in the future; and

viii) the potential impact new development may have on existing centres.

7.2 The floorspace projections shown in the previous sections should be treated with caution and should only be used as a broad guide, particularly when translated into the development plan allocations or when used to guide development control decisions. For instance, although our conclusions indicate that there is no requirement for additional retail floorspace over the period to 2013 (assuming committed/ proposed development is implemented) if a town centre scheme comes forward it may be acceptable to permit this if it is of an appropriate scale in terms of the role and function of that centre. Such floorspace limits should not inhibit competition between retailers within town centres.

7.3 Medium and long term forecasts (i.e. beyond 2013) may be more susceptible to change, due to unforeseen circumstances. Projected surplus expenditure up to 2018 is attributable to projected growth in spending per capita. If the growth in expenditure is lower than that forecast then the scope for additional space will reduce. Long term projections should be monitored and kept under-review. The implications of major retail development within Rossendale and competing centres should also be monitored and the effects proposals may have on the demand for additional development in Rossendale should be carefully considered.

7.4 This section examines the opportunities for accommodating future retail and leisure floorspace requirements.

Accommodating Future Growth

7.5 Our quantitative analysis indicates that there is no global capacity to accommodate additional convenience goods floorspace. In terms of comparison goods there is no capacity for additional provision over the period to 2013, but only on the basis that current committed and proposed developments come forward. If Rossendale increases its market share (to 33%), there will be a need for additional comparison goods provision beyond 2013. However, there is no requirement for retail proposals within centres to demonstrate need in accordance with PPS6, and in any case this situation may change in the near future if draft PPS4 is formerly adopted. At present the proposed changes to PPS4, as outlined in Section 2.0, confirm that the need test will be removed when consideration is given to planning applications. In addition, qualitative issues and other material considerations are given more weight and the need to balance positive and negative impacts is more explicit.

7.6 In light of the above, we have undertaken a review of sequential sites in town centre and edge-of-centre locations, although out-of-centre sites are not considered.

7.7 The existing stock of premises may have a role to play in accommodating projected growth. The retail capacity analysis in Section 5.0 makes an allowance for existing comparison floorspace within Rossendale to increase its turnover in real terms, from 2011 onwards. Therefore, the ability of comparison retailers to increase their turnover to sales floorspace densities over and above this may be limited.

7.8 However, vacant shops could help to accommodate future growth. Vacancy levels within the Borough are relatively high and significantly above the national average in all of the four main centres. Indeed the national average vacancy rate of 11.4%, which compares to 26.6% in Rawtenstall, 19.0% in Bacup, 18.5% in Haslingden and 21.2% in Waterfoot. In total 96 shop units were identified as vacant within the four main centres. Many of these vacant units are poor quality and the demand to reoccupy the units may be limited. Therefore, it is unlikely that a high proportion of these vacant properties can be re-let. In many cases the redevelopment of vacant shop units for alternative uses may be appropriate, particularly in the smaller centres i.e. outside Rawtenstall.

7.9 Even the healthiest shopping centres will have some level of vacant space at any given time, and there will be a continual turnover of occupiers. Nevertheless, it is desirable to reduce the number of vacant units in the Borough and existing vacant units could accommodate a proportion of future floorspace need. This is particularly the case in Rawtenstall, where there are a significant number of vacant units in the Valley Centre. Redevelopment of the centre will clearly significantly reduce the vacancy rate in the town.

7.10 Government guidance indicates that local authorities should positively plan for growth, and that the quantitative need for retail development is a key consideration. However, in some smaller centres with a high proportion of vacant floorspace, which is unlikely to be reoccupied, Government guidance (PPS6) suggests that a planned decline for the centre's shopping role may be appropriate. This is an issue that is dealt with in more detail below.

Potential Development Opportunities

7.11 A review of potential town centre and edge-of-centre development sites has been undertaken in all the four main centres. The sites considered in the previous 2005 RTCS have been assessed, and any new sites that may have become available over the intervening period have also been considered. These new sites have been identified through discussions with Council Officers and through NLP site survey work.

7.12 The feasibility of accommodating future retail or leisure floorspace on the identified sites has been assessed against the following factors:

- existing land uses and availability, categorised as follows:
  - short term - potential to be completed by 2013;
  - medium term - likely to be completed between 2013 and 2018;
  - long term - likely to be completed after 2018;
- commercial potential for retail/leisure development and the most likely form of development, categorised as follows:
  - prime site - likely to attract a developer and occupiers;

- off-prime site - could attract specific forms of retail use; and
- secondary site - may generate limited demand.

- potential scope to accommodate additional retail/leisure floorspace (net increase), categorised as follows:
  - small scale - under 1,000 sq m gross floorspace;
  - medium scale - 1,000 to 2,500 sq m gross floorspace;
  - large scale - over 2,500 sq m gross floorspace;
- potential development constraints; and
- possible alternative uses.

7.13 The overall potential of each opportunity, taking on board all of the factors listed above, has been categorised as follows:

- *Good* - development sites that have good prospects for providing additional retail/leisure floorspace, and should be considered for implementation in the short to medium term;
- *Reasonable* - development sites which are well located and may provide potential for additional floorspace, although obstacles to development will need to be overcome, but implementation may only be achieved in the long term; and
- *Poor* - development sites that may be unattractive or unsuitable for retail or leisure development where their delivery is very uncertain.

7.14 The evaluation undertaken for each opportunity is not a detailed planning appraisal and does not imply that planning permission should be granted or refused for retail/leisure development. However, the evaluation is expected to identify potentially suitable development opportunities that may be worthy of further consideration by the Council. This evaluation provides a framework within which the Council can consider the implementation of a development strategy for Rossendale's centres.

Evaluation of Potential Development Sites

7.15 Each opportunity site identified has been evaluated based on the factors listed earlier in this section. An assessment of each site is provided in Appendix H, and is summarised in Table 7.1 below.

Table 7.1: Site Evaluation Summary

Site	Potential Scale Retail/Leisure Development	Potential Availability	Overall Development Potential
Rawtenstall			
R1: Rawtenstall Market	Small/Medium	Medium / long term	Poor
R2: Car park, St. Mary's Way	Small/Medium	Medium / long term	Reasonable/ Good
R3: The Valley Centre	Large	Short/ medium term	Good
R4: Car park Kay Street	Small/Medium	Medium / long term	Poor
R5: Heritage Arcade	Small	Short term	Good
R6: Robert Street Depot	Small/ medium	Short/ medium term	Reasonable/ Poor
Waterfoot			
WF1: Former More Shoes	Small/medium	Short/ medium term	Poor
WF2: Victoria Arcade, Burnley Road East	Small	Short / medium term	Reasonable
WF3 The Royal Hotel	Small	Short term	Good/Reasonable
Bacup			
B1: Vacant Bingo Hall	Small/Medium	Short/ medium term	Reasonable/ Good
B2: Vacant Market Hall, Bank St.	Small	Short/ medium term	Poor
B3: Lancashire & Yorkshire building, Market Street	Small	Short term	Reasonable
B4: Car Park Lord St.	Small	Medium / long term	Poor
B5: Former Horace's nightclub	Medium	Short term	Good/ Reasonable
B6: Former Health Centre	Small/ medium	Short term	Poor
Haslingden			
H1: Vacant Works Building, Radcliffe Road and Bell Street Mill	Medium	Short term	Reasonable
H2: Dearden House	Small	Short term	Good/ Reasonable
H3: Derelict plot John Street	Small	Short term	Reasonable

7.16 There are a number of opportunities that have 'good' or 'reasonable' development potential for retail and/or leisure use that could be implemented in the short term (i.e. by 2013) should development sites for such uses be required.

7.17 In Rawtenstall the Heritage Arcade has *'good'* development potential and is available in the short term. The Valley Centre provides the optimum opportunity to improve town centre retailing in the town and in the Borough generally, in terms of attracting national multiple retailers in a central location. Other sites have the potential to come forward within longer timescales.

7.18 In Waterfoot the vacant public house on Bacup Road is available in the short-term and has reasonable/ good development potential, although this site is most likely to be suitable for A3 uses. The Victoria Arcade on Burnley Road with a '*reasonable*' development potential offers the greatest development opportunity for additional retail floorspace.

7.19 There are three potential opportunities within Bacup with *'good'* or *'reasonable/good'* potential all of which are available in the short term. This includes Site B5 which has resolution to grant planning permission for a foodstore. Some of the opportunities identified could provide additional retail and leisure floorspace if operator demand emerges in Bacup.

7.20 In Haslingden, Dearden House in the centre is currently vacant and has *'good/ reasonable'* development potential. This could accommodate some additional comparison floorspace to improve the retail offer within the town. The vacant works building on Radcliffe Road provides the opportunity to develop a mixed use scheme which could include retail and/or leisure uses and has *'reasonable'* development potential.

8.0 RECOMMENDATIONS

8.1 This Study provides a borough-wide needs assessment for retail and commercial leisure uses in Rossendale up to 2024. It updates the previous Study undertaken for the Council by NLP in 2005. The principal conclusions of the analysis contained within this Study and subsequent recommendations are summarised below.

The Role of Shopping Centres

8.2 The Local Development Framework should provide clear guidance on the definition of centres within the Borough. The future definition should be consistent with PPS6 and the Regional Spatial Strategy for the North West. This will assist in determining whether development proposals are compliant with the sequential approach and are consistent in terms of scale and nature with the role of the nearest centre.

8.3 Based on the hierarchy of centres in the sub-region and Government guidance, we recommend the definitions shown in Table 8.1. These recommended definitions have changed since the previous Town Centre and Retail Study due to the changed retail policy landscape.

Table 8.1 Recommended Retail Hierarchy

Centre Classification	Definition/Comment
Town Centres	As described in Annex A of PPS6. Such centres are the principal centre or centres in a local authority's area. In rural areas they are likely to be market towns with a role and function as important service centres, providing a range of facilities and services for extensive rural catchments. Only Rawtenstall potentially falls into this category.
District Centres	As described in Annex A of PPS6. The primary role of these centres will be the provision of convenience shopping, services and limited comparison shopping serving a relatively localised catchment area. Haslingden and Bacup would fall into this category.
Local Centres	As described in Annex A of PPS6. These centres should include a range of small shops of a local nature, serving a small catchment, and might include amongst other shops a small supermarket, a newsagent, a sub-post office and a pharmacy. Waterfoot and Whitworth would be examples.

8.4 This update has shown that Rawtenstall remains the dominant centre in the retail hierarchy of Rossendale, and although changes have occurred to the diversity of uses present in all centres in the Borough over the 2004 to 2008 period, the conclusions of the previous study in regard to the broad retail hierarchy remain unchanged.

8.5 In NLP's view, Rawtenstall should be defined as a town centre in recognition of the role and function that it performs in providing retail facilities, services and civic functions to residents of Rossendale. Bacup and Haslingden are also important centres, although they serve smaller catchment populations. On this basis, we would advise that they are defined as district centres in line with the definitions provided in PPS6. The smaller centres of Waterfoot and Whitworth have the appropriate range of uses to be defined as local centres.

8.6 In terms of the other defined centres in Rossendale which comprise, Edenfield, Crawshawbooth, Helmshore, Shawforth/Facit and Stacksteads, we consider that these perform a localised shopping role and lack the necessary range of goods and services normally expected of a Local Centre according to PPS6. On this basis, we would recommend that these centres be classified as Neighbourhood Centres in the retail hierarchy.

8.7 In light of the above, we recommend the following hierarchy of centres:

> **Town Centres:** Rawtenstall;
> **District Centres:** Bacup and Haslingden;
> **Local Centres:** Waterfoot and Whitworth;
> **Neighbourhood Centres:** Edenfield, Crawshawbooth, Helmshore, Shawforth/Facit and Stacksteads.

8.8 Rawtenstall is placed at the top of the local retail hierarchy and should be the main focus for medium and large-scale retail and leisure development which would attract a large number of people. Retail and leisure development within the district and local centres in the Borough should also be supported provided that it is appropriate to the role and function of each centre in terms of nature and scale. However, each proposal would need to be considered on its individual merits.

The Strategy for Rossendale's Centres

8.9 Our quantitative assessment of convenience and comparison goods capacity in Rossendale in the short, medium and long term (to 2024) indicates that there is no global capacity for additional convenience floorspace in the Borough, even by 2024. In terms of comparison floorspace, we have assumed that Rossendale can increase its market share through committed and proposed development to 33% which will result in a requirement for additional comparison floorspace after 2013, and potentially sooner should not all committed and proposed developments come forward. There may also be other reasons for permitting retail schemes in the future. Retail proposals within centres are not required to comply with the PPS6 policy tests, assuming that the scale is appropriate and the proposals would not have an adverse impact upon any other centre. As such, proposals for convenience floorspace may be appropriate despite the lack of need identified in the Study. The position regarding need may also change for edge and out of centre retail proposals, if PPS4 (as currently drafted) is approved.

8.10 Higher order comparison shopping has generally polarised within larger centres. Therefore, Rochdale, Manchester, Blackburn, Bury and Burnley are likely to remain the main focus for comparison shopping within the sub-region. If these national trends persist then the reorientation of the role of smaller town centres as primarily convenience and lower order comparison shopping is likely to continue.

8.11 However, Rawtenstall, as the main centre in the Borough, has the best prospects for attracting new investment and major retail/leisure development. It seems very unlikely that the smaller towns, based on current trends can provide a significant role as higher order comparison shopping destinations in the future.

8.12 Within the main shopping centres there are a large number of vacant units, although these are generally small, older premises often unsuited to the requirements of modern retailing. As such, it is unlikely that the Borough can attract a significant number of new multiple retail/leisure operators without major new development. There are two main schemes in the development pipeline, New Hall Hey and the Valley Centre, which could provide modern, large-format retail units, although it remains unclear which of these schemes, and in what form, will come to fruition.

8.13 Future policies should as a minimum seek to promote small scale development and redevelopment to improve the quality and quantity of floorspace in all centres. Where appropriate, the existing markets should be enhanced as they clearly play an important role in meeting residents' shopping requirements. Policies should recognise the role of the smaller shopping centres, which offer a good spread of convenience and lower order comparison shopping throughout the Borough. The smaller centres are important in providing shops and services for local residents. This network of shops and services should be protected and enhanced to ensure that residents have easy access to facilities.

8.14 PPS6 indicates that local authorities should define the boundary of town and district centres. PPS6 makes clear that for retail purposes, the *"centre"* is the primary shopping area. For all other main town centre uses the "centre" should be regarded as the area embraced by the town centre boundary.

8.15 PPS6 states that the Primary Shopping Area should be the defined area where retail development is concentrated (generally comprising the primary frontages and those secondary frontages which are contiguous and closely related to the primary shopping frontage). The extent of the primary shopping area should be defined on the proposals map. Smaller centres may not have areas of predominantly leisure, business and other main town centre uses adjacent to the primary shopping area, and therefore the town centre may not extend beyond the primary shopping area. Primary frontages are likely to include a high proportion of retail uses. Secondary frontages provide greater opportunities for a diversity of uses.

Rawtenstall

8.16 Rawtenstall provides a strong convenience offer (given the new Asda and Tesco stores) and a reasonable range of other shops and services. The town's retailers and services meet most day to day shopping needs including some lower order comparison shopping needs. However, the centre provides a limited range of higher order comparison goods. Few multiple retailers are represented in the town, although the centre is reasonably attractive and has a good selection of independent outlets.

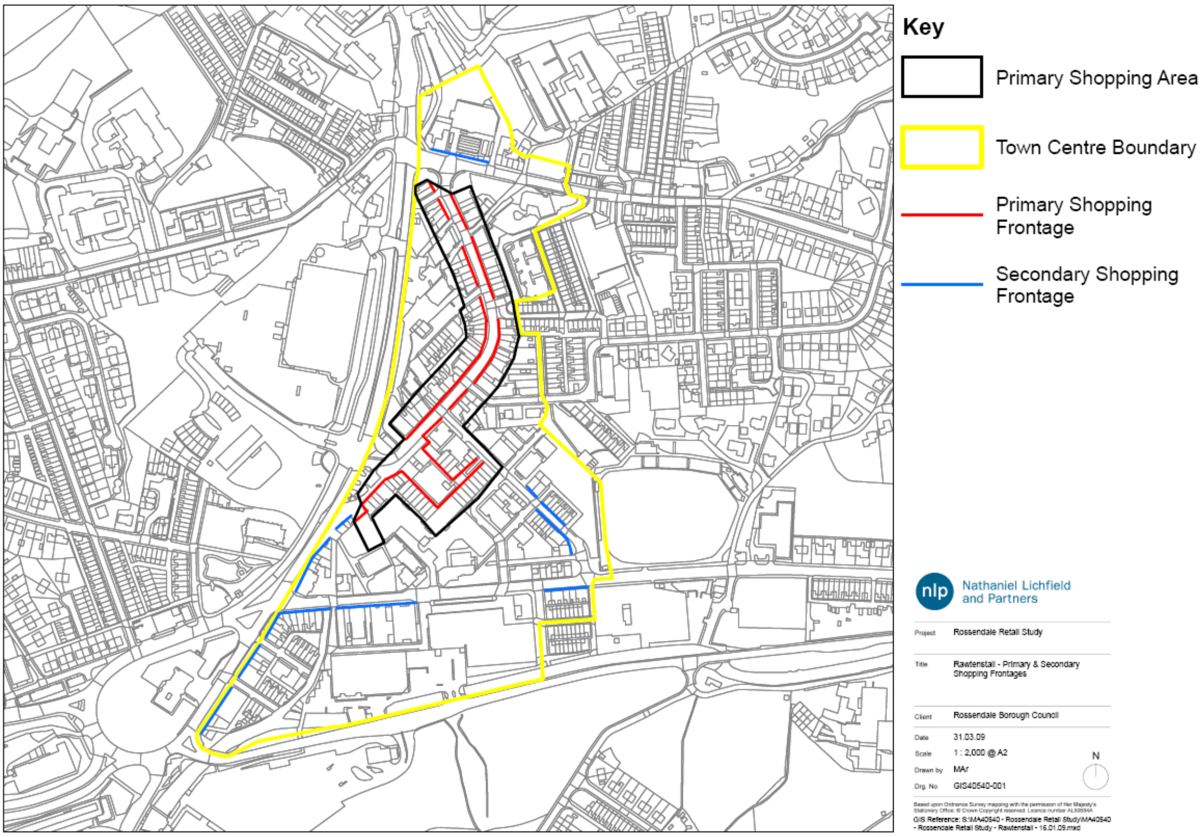
8.17 The Valley Centre is a prime retail site, however, it is largely vacant and currently detracts from the environmental quality of the shopping centre. The Council should as a priority encourage the redevelopment of this site, which could attract national multiples into the centre and increase the attraction of Rawtenstall as a shopping destination. The scheme and therefore the overall offer of Rawtenstall would be improved if the land which currently accommodates the Council offices was included. This could open up a route from Bacup Road across from the Lidl store, which has recently opened. Any increase in market share would have significant spin-off benefits for the town as a whole.

8.18 There is extant planning permission at New Hall Hey for comparison retail floorspace, convenience retail floorspace (subject to a Section 106 agreement) and leisure uses.

The site has been partially developed, although construction has ceased and there are doubts about the deliverability of this site as considered above. If this site does not come forward, then any replacement comparison floorspace should be directed towards Rawtenstall Town Centre.

8.19 The proposed Primary and Secondary Shopping Frontages, Primary Shopping Area and town centre boundary for Rawtenstall are shown below.

Figure 8.1 Proposed Rawtenstall Town Centre Boundaries



8.20 The defined Shopping Frontages and Primary Shopping Area have been derived based on the definitions contained in PPS6. These comprise the following (Table 2, PPS6):

> *"Primary Shopping Area - Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are contiguous and closely related to the primary shopping frontage). The extent of the primary shopping area should be defined on the proposals map. Smaller centres may not have areas of predominantly leisure, business and other main town centre uses adjacent to the primary shopping area, therefore the town centre may not extend beyond the primary shopping area.*
>
> *Primary frontage - Primary frontages are likely to include a high proportion of retail uses.*

Secondary frontage - Secondary frontages provide greater opportunities for a diversity of uses."

8.21 The suggested PSA (including all the defined Primary Shopping Frontages) for Rawtenstall has been based on the area within which the majority of units are in Class A1 retail use. The secondary shopping frontage includes areas with Class A1 retail and also other retail/ leisure service uses that adjoin the PSA/ primary shopping frontage without significant physical or psychological barriers being present. The PSA does not include either of the large foodstores in Rawtenstall. St Mary's Way dual carriageway forms a major physical barrier separating the Asda store from the town centre, whilst the Tesco store is located at some distance from the PSA and is separated from it by the busy Bocholt Way. Neither store is therefore particularly well integrated with the core town centre on the eastern side of St Marys Way.

8.22 In terms of the wider town centre boundary, draft PPS4 refers to expanding town centre boundaries where growth is identified and cannot be accommodated in the existing town centre. However, given our conclusions that there is limited capacity (over and above existing commitments) there is no requirement, in our view, to extend the boundary further. This view is further supported by the need to encourage the redevelopment of the Valley Centre which is located within the PSA. We also note that draft PPS4 confirms that any extensions to the town centre boundary should be *"carefully integrated with the existing centre ...... to allow easy pedestrian access"*. On this basis, we have not included the civic and retail uses to the west of St Mary's Way or the Tesco store to the south of Bocholt Way in our town centre boundary.

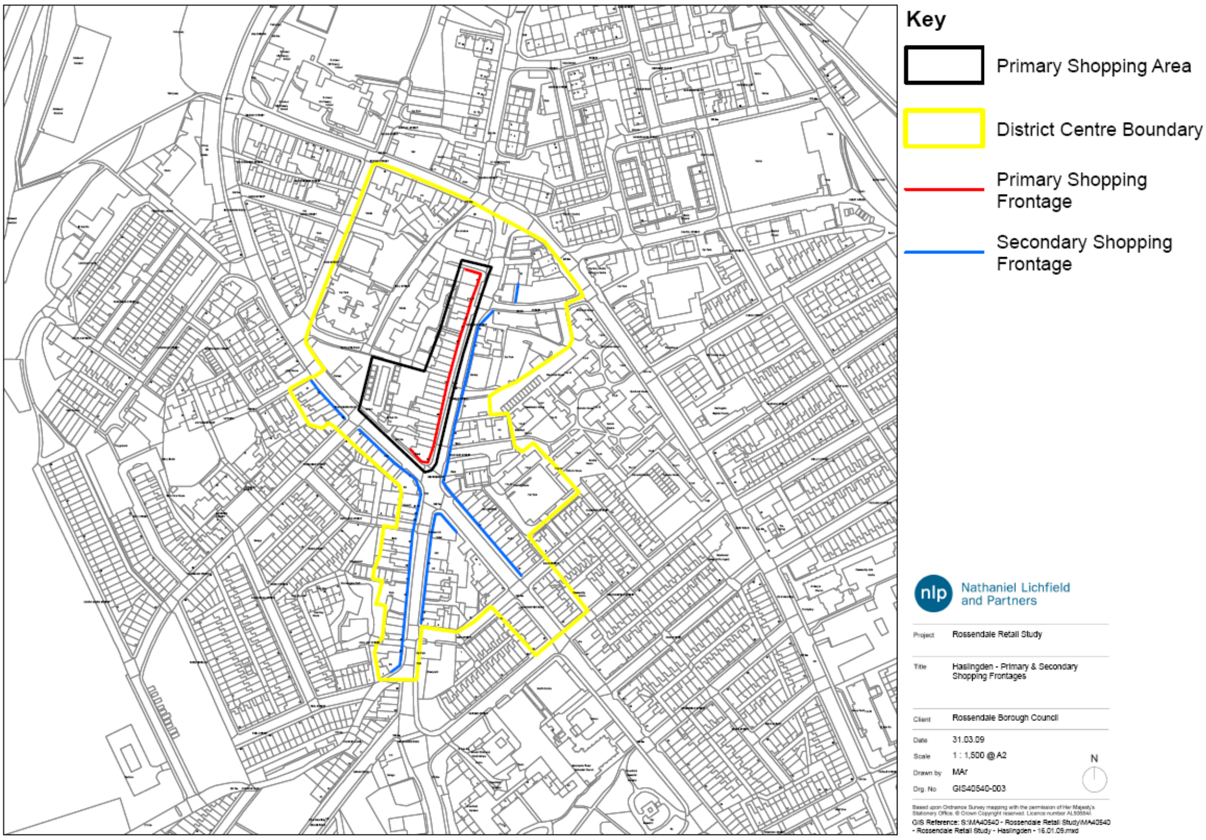
8.23 The boundaries recommended for retail purposes differ from those recommended in the Rawtenstall Area Action Plan (AAP) Revised Preferred Options document (March 2006), outlined in Section 2.0 of this report. The 'Inner Core' and 'Outer Core' definitions used in the AAP are not PPS6 compliant and from a retail perspective it is necessary to ensure that definitions to be used in emerging LDF documents accord with national retail guidance.

Haslingden

8.24 Haslingden serves the day to day convenience shopping and service needs of local residents. It has a reasonable range of service uses and an outdoor market. However, the close proximity of higher order centres suggests the town centre is unlikely to expand significantly. Haslingden's role as an important convenience and lower order comparison shopping destination should be maintained and where appropriate enhanced if suitable proposals come forward. There are a number of opportunity sites within Haslingden where retail development (both convenience and comparison) should be encouraged.

8.25 The proposed Primary and Secondary Shopping Frontages and town centre boundary for Haslingden are shown in Figure 8.2 below.

Figure 8.2 Proposed Haslingden District Centre Boundaries



Bacup

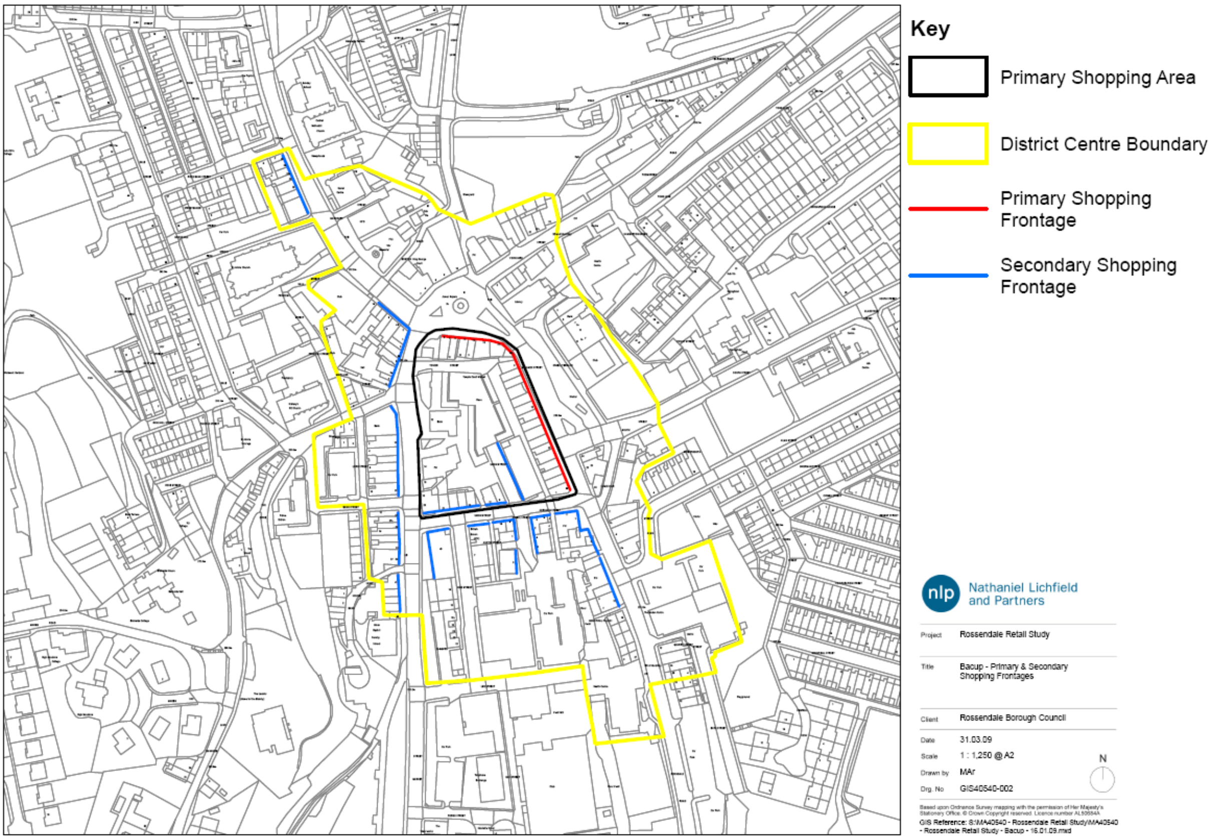
8.26 Bacup serves the day to day shopping and service needs of local residents. It performs an important convenience function and has an outdoor market. National multiple representation in the centre is low, however it offers a good range of retail, service and civic uses. The site to the south of the town centre (former Horace's nightclub) has a resolution to grant planning permission for a foodstore and if developed this proposal would improve the convenience offer of the town and increase its overall draw through spin-off benefits. This could encourage other retailers to invest in the centre.

8.27 Its future role should continue to focus on catering for its local population, although there are opportunities to capitalise on its status as a heritage centre with a number of buildings of high architectural value. Bacup has a number of sites which could potentially accommodate future development, although some of these may be more suited towards residential or other non-retail uses. An increase in the residential population of the town through new development could support additional retail and leisure facilities in Bacup in the future.

8.28 Contraction of the town centre may aid its future health by consolidating retail and service uses on a smaller area and allowing peripheral areas to revert to alternative residential or employment uses.

8.29 The proposed Primary and Secondary Shopping Frontages and centre boundary for Bacup are shown in Figure 8.3 below.

Figure 8.3 Proposed Bacup District Centre Boundaries

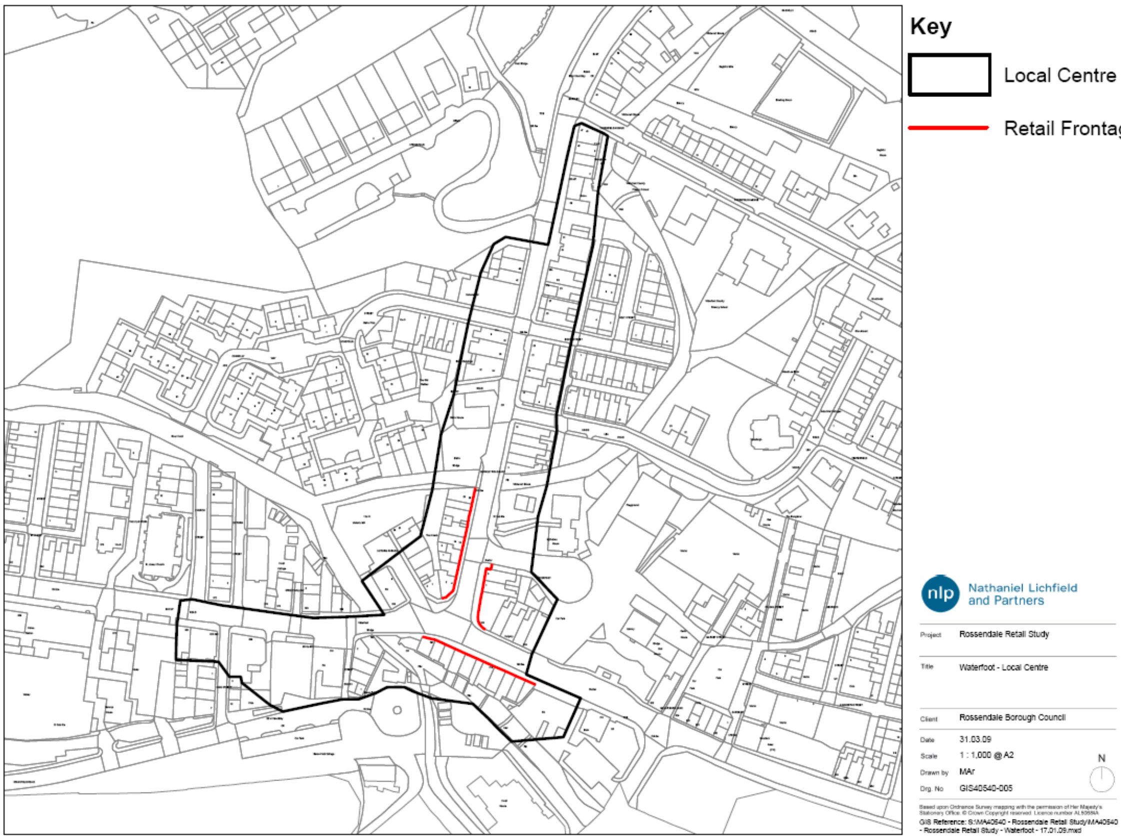


Waterfoot

8.30 Waterfoot is a small centre serving predominantly local needs. Local residents are likely to continue to travel to Rawtenstall and beyond for a wider choice and range of facilities. Although the centre undoubtedly provides an important role in providing day to day goods and services to a small local population, the retail offer of the centre appears to have contracted since the previous survey with vacancies having more than doubled. It may be appropriate for the Council to seek to consolidate retailing on a smaller area, as the centre is spread over a fairly wide area, interspersed with residential units. A greater concentration of units on the Bacup Road/ Burnley Road East junction for example would improve the quality of the centre and focus resources and investment. This would be aided by the reoccupation of the largely vacant terrace retail units on Burnley Road East.

8.31 Given that we consider Waterfoot to operate as a Local Centre, we do not consider it appropriate to define a Primary and a Secondary Shopping Frontage, although a local centre boundary has been defined. Following discussions with the Council, we have also defined a 'Retail Frontage' boundary in order to encourage the contraction and consolidation of the centre. This area includes retail units around the junction of Burnley Road East and Bacup Road and the Victoria Arcade. Given that this area contains a high proportion of vacant retail units and retail service uses we do not consider that it currently accords with the description of a Primary Shopping Area/ primary shopping frontage as set out in PPS6 and it would not be appropriate to define it as such. However, the Council could include a policy within the relevant LDF document seeks to support and encourage A1 retail uses, and restrict service uses, within the defined Retail Frontages in Waterfoot.

Figure 8.4 Proposed Waterfoot Local Centre Boundary

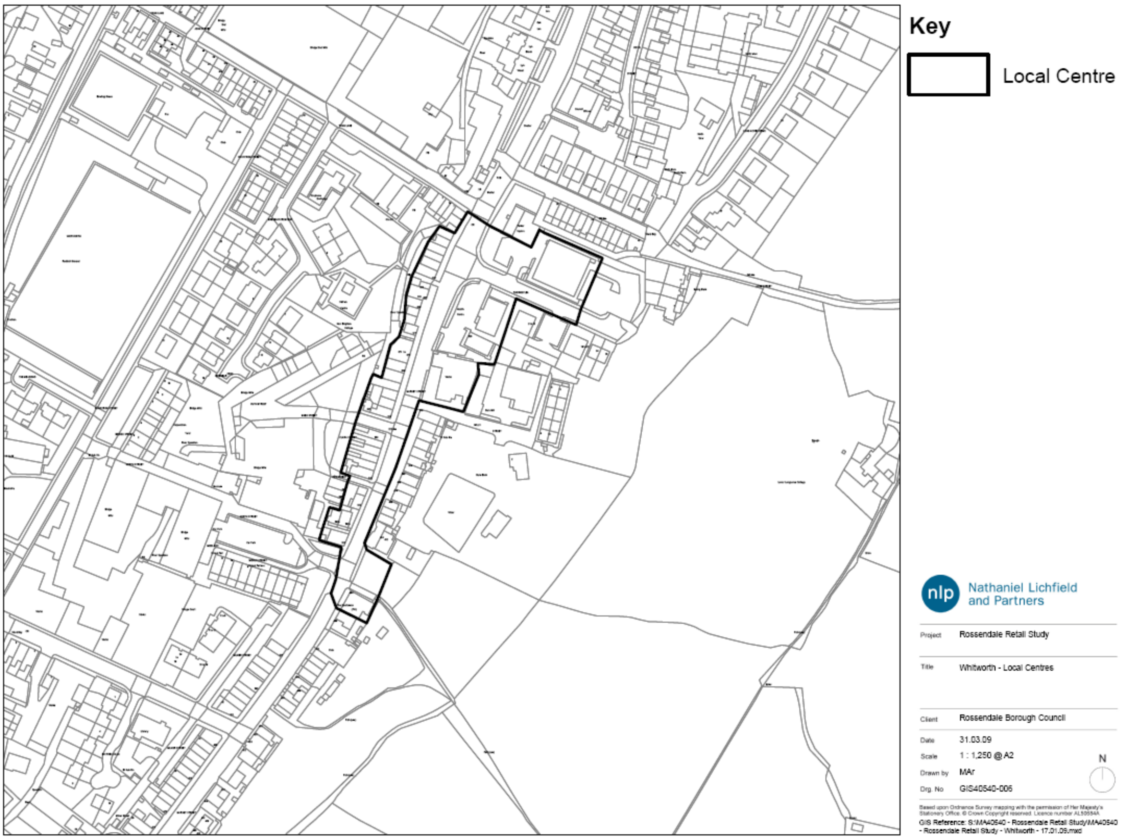


Whitworth

8.32 Whitworth is a small centre serving a local catchment. It is an important centre that appears to trade well and offers a reasonable range of essential everyday goods and services in addition to several civic uses. There is no need to allocate additional sites in Whitworth for future retail development, but the reoccupation of vacant retail properties for retail uses should be supported where possible.

8.33 We have drawn a local centre boundary for Whitworth which is shown below. A modest range of retail and service uses are located throughout Whitworth, but these are interspersed with residential uses. On this basis, we have not defined a PSA or primary/ secondary shopping frontage for the centre.

Figure 8.5 Proposed Whitworth Local Centre Boundary



Other Local Centres

8.34 The other smaller centres, to varying degrees, serve the day to day leads of their immediate catchments. There is little scope for future growth, however, opportunities should be taken to improve the centres as and when they come forward. Given the rather sporadic nature of these smaller centres and the more limited range of uses that they contain, we do not consider it appropriate to define boundaries.

Meeting Shopping Needs in Rossendale

a) Convenience Goods Capacity

8.35 The analysis in Section 5.0 shows that the development of three large foodstores in the Borough since the last Study means that there is no capacity for additional convenience floorspace within the Borough. However there may be opportunities to enhance the convenience offer within the centres on appropriate sites. In this respect we consider that the Lidl scheme and the Bacup foodstore scheme will improve these centres' overall retail offer.

b) Comparison Goods Capacity

8.36 Section 5.0 of this report considers the capacity for additional comparison goods in the Borough, based on the assumption that the comparison goods market share is increased to 33%. This scenario confirms that there is no additional capacity for comparison goods floorspace at 2013, on the assumption that all committed and proposed schemes in the pipeline are developed. If committed/proposed developments do not come forward as planned, this would create additional capacity for comparison floorspace prior to 2013.

8.37 Any additional need for comparison goods floorspace over the 2008 to 2013 period should be directed towards town centre sites (and in particular the PSA in Rawtenstall) in the first instance to ensure, as far as possible, that the schemes enhance the vitality and viability of the centres. In addition to the Valley Centre site in Rawtenstall, we consider that there are sites identified in Section 7.0 that could accommodate new comparison goods floorspace.

Commercial Leisure Development within Rossendale

8.38 The provision of leisure and entertainment facilities within the Borough is relatively limited, and much of the existing provision is small scale. The potential catchment population is sufficient to support some new small-scale commercial leisure uses, although in reality the strength of competing facilities is likely to restrict the scope for larger scale commercial leisure uses. The key potential areas for improved facilities are for additional class A3 (restaurants and bars) uses.

8.39 Future town centre development e.g the Valley Centre should provide additional space for leisure and Class A3 uses as well as Class A1 retail uses. An allowance of 10% to 15% of new floorspace for Class A3 uses may be appropriate, i.e. over and above the high street comparison retail floorspace projections.

Criteria for Assessing Development Proposals

8.40 The criteria for assessing retail and leisure development proposals that may emerge within Rossendale is outlined below. This is based on the existing PPS6. Most importantly any future retail proposals will need to be considered in the context of limited comparison goods capacity before 2013, and no convenience goods capacity over the plan period.

i. What is the locational area of need and what town centres could potentially fulfil any identified area of need? (based on existing PPS6)

ii. Is a site available in appropriate town centres, and will this site meet the identified need?

iii. If so, is the town centre site acceptable in terms of site specific/land use policy, design and highway terms?

iv. Is the likely development of an appropriate size/ scale to meet the identified need without harming the town centre or another centre in the hierarchy?

v. If there is no town centre site is an edge of centre site acceptable in terms of (iii) and (iv) available with good links to the town centre and genuinely accessible by a choice of means of transport;

vi. If there is no town centre site suitable, available and viable to meet the identified need, is there an out-of-centre site, which meets criteria (iii) and (iv) and is genuinely accessible by means of transport other than the car.

8.41 When facilitating these steps the Council should seek to direct retail and leisure proposals to existing centres.

Implications of draft PPS4

8.42 The proposed changes to PPS4, if approved in their current form, will have an impact upon the Council's consideration of edge or out of centre proposals. As discussed in Section 2 of this Study, the proposed changes would see the removal of the needs test when assessing proposed retail development, although a new impact test would be introduced. In this instance, the above criteria would change with no requirement to demonstrate need for edge and out-of-centre developments. Greater weight would be placed on qualitative issues when assessing proposals. The criteria for assessing development proposals outlined above should be reviewed when any changes to PPS6 are brought in.

8.43 Although the needs test would be removed if draft PPS4 is implemented in its current form given the requirement for retail applications to be compliant with the relevant development plan, it is clear that applicants will need to consider their proposals in the context of the retail capacity figures contained within LDF documents.

8.44 Based on Policy EC21 of Draft PPS4, we would suggest the that the Council uses the policy criteria for development control purposes when assessing planning applications if the draft PPS4 document is approved in its current form:

"Planning applications proposing the development of town centre uses on sites not within a centre nor allocated in the Rossendale LDF will be determined in the following manner:

- *Planning permission will be refused where the applicant has not demonstrated compliance with the requirements of the sequential approach;*

- *Planning permission will be refused where there is clear evidence that the proposal is likely to lead to significant adverse impacts in terms of mitigation of, or adaptation to, climate change or any one or more other key impacts under Policy EC20.1(3) of draft PPS4 (the impact assessment);*

- *Development proposals will be considered favourably where any adverse impacts under Policy EC20.1(3) are not significant and these are likely to be outweighed by significant wider economic, social and environmental benefits arising from the proposal under Policy EC20.1(4) or other material considerations;*

It is also necessary for applicants to consider the vitality and viability of existing town and district centres, the Rossendale Retail and Town Centre Study Update 2009 (or equivalent) and any other published local information".

8.45 In terms of the first criterion relating to compliance with the sequential approach, the final version of PPS4 will confirm whether conflict with the sequential approach on its own always warrants refusal of a planning application, or whether it is an issue that needs to be weighed in the wider retail planning balance.

Future Strategy Implementation and Monitoring

8.46 Given the uncertainty surrounding national retail planning guidance, it is not possible to provide a definitive approach towards strategy implementation. It will be necessary to review the Council's approach toward its defined centres and retail development subsequent to any new guidance being introduced.

8.47 Notwithstanding this, there are a number of areas which the Council could pursue in order to maintain and enhance the role of shopping centres:

- application of guidance within PPS6 (as currently exists), particularly relating to scale, need, the sequential approach and impact in determining edge and out-of-centre retail and other development proposals that generate significant numbers of trips;

- measures to improve accessibility and public transport to the defined centres in order to encourage more residents to shop within their nearest centre;

- the implementation of shop frontage policies within emerging LDF documents to protect retail and other desirable town centre uses. This will have regard to the retail frontage recommendations in this report;

- the continued implementation of public realm improvements to improve the attractiveness of shopping environments within all centres;

- the creation and continued support for town centre management activities; and

- measures to bring forward development opportunities, such as the Valley Centre.

8.48 The recommendations and projections within this study are expected to assist the Council in preparing the emerging LDF documents and to assist development control decisions during this period. The Study provides a broad overview of the potential need for further retail and leisure development up to 2013, with medium-term forecasts to 2018 and longer term forecasts to 2024. It should be reiterated that projections are subject to uncertainty and forecasts will need to be amended to reflect emerging changes as and when new information becomes available. Medium and long-term projections up to 2024 should be treated as indicative only.

8.49 We would recommend that this retail/leisure capacity study should be updated again in five years time and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:

- population projections;

- local expenditure estimates (information from Experian or other recognised data providers);

- growth rate assumptions for expenditure per capita (information from Experian or other recognised data providers);

- the impact of potential increases in home and internet shopping;

- existing retail floorspace and average turnover to floorspace densities (floorspace surveys and turnover data from Management Horizons Retail Ranking);

- implemented development within and around the study area;

- the role and function of defined centres; and

- national retail guidance.

8.50 These key inputs into the retail/leisure capacity assessment can be amended to provide revised capacity projections. We do not envisage that the structure of the capacity assessment set out in this report will need to be amended. A new household survey is likely to be required in order to accurately assess shopping patterns at the time of any future study.