



# Blackpool and Wyre Retail and Leisure Study

Final Report

---

ON BEHALF OF BLACKPOOL AND WYRE COUNCILS

October 2025

## Contents

<b>1.</b>	<b>Introduction</b>	<b>4</b>
	Instruction and Purpose	4
	Structure of Report	6
<b>2.</b>	<b>Current and Emerging Retail and Leisure Trends</b>	<b>7</b>
	Economic Conditions	7
	Available Expenditure and the Impact of the Internet	8
	Convenience Goods	10
	Comparison Goods	11
	Leisure and Food & Drink	12
	The Night-Time Economy	13
	Planning Reform on the High Street	13
	Out-of-Centre Retailing	14
	Implications for the Blackpool and Wyre Authority Areas	15
<b>3.</b>	<b>Planning Policy Context</b>	<b>19</b>
	Revised National Planning Policy Framework	19
	Ensuring the Vitality of Town Centres Planning Practice Guidance	21
	Local Planning Policy Context	23
	Wyre Local Planning Policy Position	23
	Blackpool Local Planning Policy Position	26
	Other Documents of Relevance	31
	Summary of Policy Overview	32
<b>4.</b>	<b>Market Research – In Street Surveys (Blackpool Town Centre)</b>	<b>34</b>
	Travel to Blackpool Town Centre	35
	Purpose(s) and Duration of Visits	39
	Spending Intentions	44
	Frequency of Visits	45
	Evening/Night-Time Visits	45
	Comparisons with Surrounding Centres	48
	Likes, Dislikes and Suggested Improvements to Blackpool Town Centre	51
	Why Do You Choose to Shop in/Visit Blackpool?	51
	Weaknesses of Blackpool Town Centre	51
	Suggested Improvements to Blackpool Town Centre	52
	Desired Changes to Specific Elements of Blackpool Town Centre’s Offer	52
	Abingdon Street Market	54
	Summary	57
<b>5.</b>	<b>Market Research – Household Surveys</b>	<b>61</b>
	Market Share Analysis: Household Survey Results	61
	Non-Store Retailing or Special Forms of Trading	61
	Retail Goods Market Share Analysis	62
<b>6.</b>	<b>Healthcheck Assessments and Land Use</b>	<b>77</b>
	Introduction	77
	Blackpool Town Centre	78
	Blackpool’s District Centres	80
	Wyre’s Town Centres	86

<b>7. Population and Expenditure</b>	<b>92</b>
Study Area and Household Survey	92
Study Area Population	92
Retail Expenditure	93
Convenience Goods Expenditure	95
Comparison Goods Expenditure	95
<b>8. Assessment of Retail Capacity</b>	<b>97</b>
General Approach to Estimating Quantitative Capacity	97
Future Quantitative Convenience Goods Capacity	100
Future Quantitative Comparison Goods Capacity	102
Convenience and Comparison Qualitative Requirements	104
<b>9. Assessment of Leisure Capacity</b>	<b>110</b>
Food and Beverage Requirements	111
Commercial Leisure: Bingo, Cinemas, Ten Pin Bowling and Casinos	115
Bingo	116
Cinemas	117
Ten Pin Bowling	118
Casinos	119
<b>10. Summary, Conclusions and Policy Recommendations</b>	<b>123</b>
Context	123
Key Findings: Retail	123
Key Findings: Commercial Leisure	124
Key Findings: Principal Centres	126
Future Retail and Centres Strategy	131
Planning Policy Recommendations	137

**Appendix 1 – Study Area**

**Appendix 2 – Household Survey Results**

**Appendix 3a – Wyre Town Centre Healthchecks**

**Appendix 3b – Blackpool Town and District Centre Healthchecks**

**Appendix 4 – In Street Survey Results**

**Appendix 5 – Quantitative Retail Tables**

**Appendix 6 – Quantitative Leisure Tables**

**Appendix 7 – Proposed Town and District Centre Boundaries**

**Appendix 8 – Plan of Existing Supermarkets in Study Area**

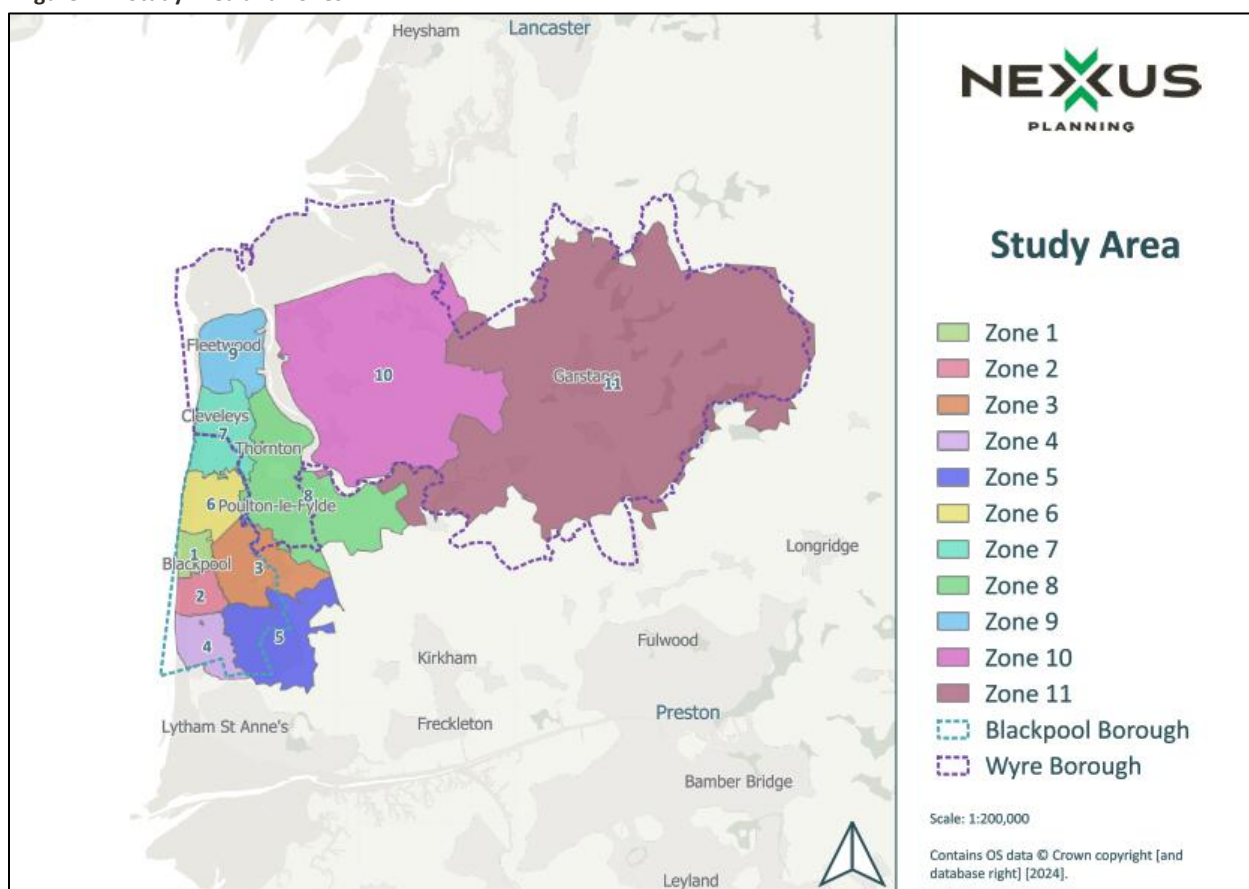
**Appendix 9 – Plans of Wyre’s Local and Neighbourhood Centres**

# 1. Introduction

## Instruction and Purpose

- 1.1 Nexus Planning has been jointly commissioned by both Blackpool and Wyre Councils to prepare a new retail and leisure study to cover the two authority areas.
- 1.2 The purpose of the Study is to inform the preparation of the emerging local plans covering both authority areas. It aims to provide the Council with an up-to-date, objective assessment of the health of centres in the Council areas, an assessment of the quantitative and qualitative need for additional retail and leisure floorspace and considers possible strategic policy responses to prevalent and emerging issues.
- 1.3 The Study has been prepared to reflect the requirements of the Town Centres and Retail Planning Practice Guidance ('the Town Centres PPG'). It seeks to provide an updated position in terms of the retail and leisure landscape across Blackpool and Wyre, alongside recommendations as to how the local authorities can best plan to help protect and enhance the vitality and viability of their defined centres in the future. Key to this is understanding the current provision, the demographics of the population and particularly for the Fylde Coast, how tourism inflow may also help to support defined centres and the wider provision.
- 1.4 This study reviews and updates previous evidence-based studies prepared for the Councils, including: the Fylde Coast Retail Study (2011 and update in 2013) and the Blackpool Retail, Leisure and Hotel Study (2018). When adopted, this study will supersede these earlier studies and provide the latest evidence base on retail and town centre policy matters for both Wyre and Blackpool authorities.
- 1.5 The Study is supported by new empirical evidence in the form of a comprehensive household survey. The household survey was undertaken by NEMS Market Research in August 2024 and covers eleven separate zones, which are collectively considered representative of the principal catchment area for retail facilities and leisure facilities located across both the authority areas of Blackpool and Wyre. The zones have been developed with regard to those utilised in the previous Studies, which provides us with the opportunity to compare shopping and leisure patterns. In this regard, it is worth noting that a separate study was commissioned in 2021 in Fylde as part of the St Annes Masterplan commission and therefore, this Study does not also cover the Fylde authority area in its entirety.
- 1.6 In addition to the above, the Study is supported by extensive healthcheck work undertaken by the project team at Nexus Planning, which is supplemented by feedback from a range of stakeholders across the authority areas who have substantial involvement in the defined centres, whether this be through development, land ownership, economic regeneration, placemaking or wider governance.
- 1.7 A plan of the Study Area is provided at Figure 1.1 and in Appendix 1, and the tabulated household survey results are provided at Appendix 2.

Figure 1.1: Study Area and Zones



- 1.8 In this regard, it is important to recognise that shopping habits are not governed by local authority area boundaries. It is therefore appropriate to consider the 'inflow' of retail expenditure from residents of neighbouring authority areas to destinations in Blackpool and Wyre in order to identify retailers' overall turnover and understand the role of centres and standalone stores across the wider area. The household survey also allows us to identify expenditure that originates within Blackpool and Wyre authority areas but which 'leaks' to destinations outside of the authority area.
- 1.9 It is important to state at the outset of this study that any medium to long term forecasts should be treated with caution. They are influenced by the dynamic changes in economic, demographic, lifestyle and market trends; including the rise of online shopping over the last decade, and wider implications on the market across the country and further afield.
- 1.10 The inherent uncertainties in forecasting are recognised by both the NPPF and NPPG. For example, the NPPG states that assessments '**....may need to focus on a limited period (such as the next five years)**' but will also need to take the lifetime of the plan into account and be regularly reviewed. The NPPF also advises that planning policies should allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, '**...looking at least ten years ahead**' (paragraph 90d).
- 1.11 For the purposes of this Study and the analysis which follows, we can broadly split the Study Area as set out in Table 1.1 below. However, it is important to note that the zone boundaries do not entirely reflect the local authority boundaries, and therefore there are some zones which cover more than one authority area.

**Table 1.1: Study Area Split**

Zone	Local Authority
1 – Blackpool town centre (north)	Blackpool
2 – Blackpool town centre (south)	Blackpool
3 – Layton and Whitegate Drive	Blackpool
4 – Blackpool Retail Park and Highfield Rd	Blackpool
5 – Clifton Retail Park	Blackpool
6 – Bispham and Red Bank Road	Blackpool
7 – Thornton Cleveleys	Wyre and Blackpool
8 – Poulton-le-Fylde	Wyre
9 – Fleetwood	Wyre
10 – Knott End-on-Sea	Wyre
11 – Garstang	Wyre

## Structure of Report

- 1.12 Our report firstly provides an overview of prevailing retail and leisure trends, before then going on to consider the planning policy context for the updated Study. We then consider the vitality and viability of the principal centres within both authority areas and what the findings of these assessments mean in terms of planning policy recommendations for the defined centres, planning for the future of the authority areas and their respective residents.
- 1.13 The remainder of the report identifies retail and leisure needs arising within the district to 2041. To undertake this assessment, we identify population and expenditure growth across the Study Area, before then reviewing shopping patterns across the Study Area as established by the household survey. The final sections of the report provide our conclusions in respect of retail and leisure needs and provide our planning policy recommendations.
- 1.14 Accordingly, this report is structured as follows:
- Section 2 sets out key retail and leisure trends of relevance to the commission;
  - Section 3 provides an overview of the planning policy context;
  - Section 4 provides an overview of the findings from the Blackpool in-street survey undertaken;
  - Section 5 provides an overview of the market share attracted to key destinations within the two authority areas and how this has altered since the production of the previous studies;
  - Section 6 summarises our assessment of the vitality and viability of the defined centres;
  - Section 7 provides an overview of forecast changes in Study Area population and expenditure;
  - Section 8 provides an assessment of retail needs;
  - Section 9 provides an assessment of leisure needs; and
  - Section 10 summarises our key findings and sets out our conclusions and policy recommendations.

## 2. Current and Emerging Retail and Leisure Trends

- 2.1 In order to provide a context for this Study and to help identify the sectors that are more likely to be the subject of additional development proposals, we set out a summary of current retail and leisure trends below. In reading the summary, it should be noted that the retail and leisure sectors are dynamic and, whilst online shopping and economic conditions have impacted on the high street, new retailers and formats continue to evolve to meet shoppers' needs.
- 2.2 The below commentary should therefore be taken as a 'snapshot' in respect of current market conditions; it will be necessary to judge future development proposals for main town centre uses with reference to the prevailing circumstances at the time of a proposal's determination. Whilst the impact of Covid-19 on the retail and leisure sectors has lessened in 2023 and 2024, the trading outlook remains challenging due to inflationary pressures and significant increases in the cost of living. We reflect further on the current economic outlook below.

### Economic Conditions

- 2.3 The UK economy was impacted significantly by the Covid-19 pandemic in 2020 and 2021, and by restrictions on movement and behaviour which sought to mitigate its impact. This uncertain background caused retail and leisure expenditure (and business investment) to decline. Household spending fell by over 20% quarter-on-quarter in the second quarter of 2020 following the imposition of national lockdown measures. This is the largest quarterly contraction on record. Retail sales volumes also suffered double-digit falls in April 2020 as all but essential stores closed during the height of the lockdown.
- 2.4 However, following the gradual reopening of businesses over the summer of 2020, the economy returned to growth, with this gathering momentum as a greater number of sectors reopened, including hospitality and leisure services. A resurgence in the number of cases of Covid-19 then resulted in the Government reinstating a nationwide lockdown in early 2021. The general economic outlook in 2022 and 2023 has continued to be of concern given very significant increases in the rate of inflation and the general cost of living.
- 2.5 In March 2025, Experian published its Retail Planner Briefing Note 22 ('ERPBN22'), which identifies anticipated future growth in the retail and leisure sectors and considers likely changes in bricks and mortar retail floorspace and online sales.
- 2.6 ERPBN22 anticipates that retail spending has been squeezed in 2022 and 2023 as a consequence of inflationary pressure and increases in the cost of living. ERPBN22 provides the following summary of the economic outlook:
- 'Since our last publication, the UK economy rebounded from the mild technical recession endured in the second half of 2023, reporting robust growth in the first half of 2024, supported by a strong service sector. However, the economy broadly stalled in the second half of the year, underpinned by weakness in business and consumer confidence both before and after the Autumn Budget. Ahead of the fiscal announcement firms deployed a wait and see approach to investment decisions, while in recent months companies appear to be in cost cutting mode given an upcoming increase in employers' National Insurance Contributions (NICs), a rise in the National Minimum Wage, and a reduction in business rates relief in April.'**
- 2.7 It is clear that the Covid-19 pandemic has accelerated the shift to online retailing with a consequent reduction in bricks and mortar retail floorspace. As a consequence, the proportion of expenditure committed via special forms of trading (i.e. internet and mail order sales) has increased.
- 2.8 More generally, as a result of relatively modest growth forecasts and the shift to online retailing, Experian forecasts that there will be a reduction in the stock of retail floorspace over the next few years.

- 2.9 In terms of inflation, Office for National Statistics data<sup>1</sup> indicates that the rate of inflation (as measured by the consumer price index) increased from 0.8% at April 2020 to 1.5% at April 2021, before then increasing significantly to 9.0% at April 2022. The rate of inflation appears to have peaked at 11.1% in October 2022 and has reduced significantly to 6.7% at August 2023 and to 2.6% as of September 2024. Retail has been an industry under significant stress, as many retailers find themselves squeezed between rising costs and the increasing volume of sales over the internet. Such difficulties have, of course, been exacerbated by the Covid-19 pandemic and the cost of living crisis associated with rising energy prices and inflation.
- 2.10 As consumer spending accounts for around 60% of GDP, the financial health of households and their willingness to spend are crucial factors in determining an economy's performance. Traditionally, consumer spending is the driving force behind GDP growth in the UK. In recent years, however, this has not been the case. First, the Covid-19 pandemic and associated lockdowns resulted in temporary large drops in spending and big changes to spending patterns (such as a greater share of spending on goods and less on services). Then, just as spending had recovered to its pre-pandemic level, the period of high inflation in 2022 and 2023 squeezed household budgets, resulting in stagnant spending in real (inflation-adjusted) terms.
- 2.11 As of the end of 2024, the ONS reported that median household disposable income in the UK did not change statistically significantly from FYE 2023, it had a small increase of 0.8% to £36,700; this is in line with pre-coronavirus (COVID-19) pandemic, FYE 2020 levels. In addition, median household disposable income for the poorest fifth of the population decreased by 2.6% to £16,800, largely because of a reduction in wages and salaries; this remains 4.9% below pre-pandemic, FYE 2020 levels.
- 2.12 In addition, consumer confidence has improved and hit a three-year high in July and August 2024. It did, however, fall in September 2024. It is likely that the new Labour government's warnings about the state of the economy and "difficult decisions" announced as part of the Budget might be factors behind the deterioration in confidence.
- 2.13 There will still be the need and demand for physical stores, despite the increase in shopping online. This is particularly the case for convenience goods sales given that online shopping orders are typically picked from the shelves of physical stores. In respect of comparison goods, there is a need for the offer to become more 'experiential' to encourage shoppers onto the high street, and to ensure that shopping is viewed as a pleasurable pastime. The shopping experience needs to evolve and diversify both to attract footfall and convert increased activity into sales. Independents clearly have an important role to play in adding interest and in providing differentiation between shopping venues.

### Available Expenditure and the Impact of the Internet

- 2.14 Experian expenditure data and growth forecasts confirm that the pandemic has resulted in turbulent short term changes in per capita convenience and comparison goods expenditure.
- 2.15 In this regard, ERPBN22 identifies that per capita convenience goods expenditure decreased by -5.0% in 2022 with a further reduction of -3.5% in 2023. This follows a previous reduction of -1.3% in 2021. Before this, in 2020, per capita convenience goods expenditure increased by 6.8%. The strong level of growth at 2020 is largely attributable to consumers spending more on such goods as a result of lockdown measures. Limited annual per capita convenience expenditure growth (relative to that which has been achieved historically) is anticipated to return across the medium to long term.

---

<sup>1</sup> ONS 'Consumer price inflation tables' dataset, July 2023.



- 2.16 As the below Table 2.1 shows, the position in respect of annual per capita comparison goods expenditure has been changeable in the past few years. Whilst annual per capita comparison goods growth of 6.8% was recorded in 2021, this followed a reduction of -8.3% in 2020. Forecast per capita comparison goods expenditure increases over the medium and longer term are positive but still below the level apparent at the turn of the millennium.

**Table 2.1: Experian's Identified and Forecast UK Convenience and Comparison Goods Per Capita Expenditure Growth**

Volume Growth per Head (%)	2019	2020	2021	2022	2023	2024	2025	2026	2027-31	2032-40
Convenience goods	-1.2	6.8	-1.3	-5.0	-3.5	-1.8	-0.8	-0.6	-0.3	-0.2
Comparison goods	2.9	-8.3	6.8	3.4	-3.2	-1.0	0.1	1.3	2.5	2.6

Source: Figure 1a and Figure 1b of Experian Retail Planner Briefing Note 22

- 2.17 Whilst the above figures identify a level of growth which is significantly below that which has historically been achieved, the situation for high street stores is exacerbated through the increasing amount of expenditure which is committed through special forms of trading<sup>2</sup> and, in particular, through online sales.
- 2.18 The below Table 2.2 sets out Experian's identified and forecast level of special forms of trading as a proportion of overall convenience and comparison goods expenditure. Experian estimates that special forms of trading will account for just under four out of every ten pounds spent on comparison goods and almost a quarter of convenience goods expenditure at 2040.

**Table 2.2: Experian's Identified and Forecast Market Share of Non-Store Retail Sales for Convenience and Comparison Goods Sectors**

Volume Growth Per Head (%)	2019	2020	2021	2022	2023	2024	2029	2034	2039	2040
Convenience goods	11.0	15.3	17.1	17.1	16.5	17.0	19.4	21.7	23.9	24.4
Comparison goods	22.0	35.6	34.8	32.0	30.9	31.6	34.1	36.3	38.6	39.0

Source: Figure 5 of Experian Retail Planner Briefing Note 22

- 2.19 The ongoing popularity of internet shopping continues to have clear implications in respect of the viability of some 'bricks and mortar' retailers. However, it is important to note that changes in how people shop also bring about some opportunities for retailers trading from the high street. In particular, many stores sell online but fulfil orders from regular stores rather than warehouses<sup>3</sup>, with purchases therefore helping to sustain tangible retail floorspace. As a consequence, Experian also provides an 'adjusted' estimate of special forms of trading, which relates to expenditure which is not available to actual stores.
- 2.20 These figures are provided in Table 2.3 below. The figures demonstrate the high proportion of online sales which are fulfilled from physical stores, and therefore the importance of retaining this offer on our high streets.

<sup>2</sup> Including internet sales, mail order, stalls and markets, door-to-door and telephone sales.

<sup>3</sup> This is particularly the case with food shopping and speciality comparison goods purchases, where retailers often try to tap into a wider market through an online presence.

**Table 2.3: Experian's Identified and Forecast Adjusted Market Share of Non-Store Retail Sales for Convenience and Comparison Goods Sectors**

Volume Growth Per Head (%)	2019	2020	2021	2022	2023	2024	2029	2034	2039	2040
Convenience goods	3.3	4.6	5.1	5.1	5.0	5.1	5.8	6.5	7.2	7.3
Comparison goods	16.5	26.7	26.1	24.0	23.1	23.7	25.6	27.3	28.9	29.3

Source: Figure 5 of Experian Retail Planner Briefing Note 22

## Convenience Goods

**2.21** Recent socio-economic conditions have led to significant shifts in convenience goods retailing, which have resulted in the 'big four' supermarket operators' market share being cut. Indeed, analysis from Kantar<sup>4</sup> has identified that the traditional 'big four' supermarket operators are no longer such, with Aldi's market share overtaking that of Morrisons over the 12 weeks to 4 September 2022. Aldi continues to achieve a market share (10.0%) higher than Morrisons (8.7%) as of June 2024.<sup>5</sup>

**2.22** Mintel<sup>6</sup> finds that the decline of the food superstore is well-established and can be attributed to two matters as follows:

- Firstly, people are undertaking food shopping in different ways. More people are living in town and city centres and are generally purchasing their own home at a later age than was previously the case.<sup>7</sup> Mintel indicates that such people are more likely to undertake food shopping on an 'as needs' basis and are more likely to eat out or use takeaways. As such, they are less likely to have need to undertake a weekly 'main food shop'.
- Secondly, the current uncertainty in the economy has made discount foodstore operators (namely Aldi and Lidl) a more attractive proposition, and many such foodstores are thriving given that shoppers are currently having to be 'money savvy'. Discounters have also made efforts to try to compete more directly with the 'big four' supermarket operators, with larger stores, greater ranges of goods, fresh foods, and premium products becoming increasingly prevalent. It is evident that the likes of Aldi and Lidl are no longer 'hard discounters' in quite the same way they once were, as they now fulfil a wider range of customers' needs by offering a greater range of products. The move towards the middle ground has allowed discounters to secure market share from both superstores and smaller convenience stores. In addition, we note that discount retailers are often happy to trade alongside more upmarket convenience goods retailers (such as M&S Foodhall) as, collectively, the two stores can meet a comprehensive range of grocery shopping needs.

**2.23** The shifts in the sector are illustrated with reference to changes in retailers' market share in recent years, as shown in Table 2.4.

**2.24** The past few years have seen the closure of a number of unprofitable grocery stores (from small convenience stores to large superstores) and the continuation of Aldi and Lidl's expansion programme. Aldi announced in

<sup>4</sup> An international market research company based in London.

<sup>5</sup> Kantar, Great Britain Grocery Market Share (12 Weeks Ending), [9 June 2024](#).

<sup>6</sup> 'UK Retail Rankings', Mintel (a market research company), April 2018.

<sup>7</sup> Article headlined 'Average UK first-time buyer is now older than 30, says Halifax', The Guardian, January 2022.

September 2023 that it intends to open another 500 stores in the coming years.<sup>8</sup> Lidl intends to open a further 250 stores across the UK.<sup>9</sup>

- 2.25 Whilst the traditional 'big four' remain more cautious in respect of new openings, a limited number of proposals for mid-sized foodstores are currently being promoted by these operators in areas where there is a growing population, or an obvious shortfall in existing provision. These stores are often of a scale that is broadly comparable to that provided by Aldi and Lidl, which allows customers to shop in a convenient and efficient manner.

**Table 2.4: Market Share of Convenience Goods Operators**

Operator	December 2017	December 2018	December 2019	December 2020	December 2021	December 2022	December 2023	December 2024
Tesco	28.1%	27.8%	27.4%	27.3%	27.9%	27.5%	27.6%	28.1%
Sainsbury's	16.5%	16.1%	16.0%	15.9%	15.7%	15.5%	15.8%	15.9%
Asda	15.3%	15.2%	14.8%	14.3%	14.2%	14.0%	13.6%	12.3%
Morrisons	10.8%	10.6%	10.3%	10.4%	10.1%	9.1%	8.8%	8.6%
Aldi	6.8%	7.4%	7.8%	7.4%	7.7%	9.1%	9.3%	10.3%
Co-op	5.8%	5.9%	6.1%	6.0%	5.8%	5.6%	5.4%	5.5%
Lidl	5.0%	5.3%	5.9%	6.1%	6.3%	7.2%	7.7%	7.7%
Waitrose	5.2%	5.0%	5.0%	5.0%	5.1%	4.7%	4.6%	4.4%
Iceland	2.2%	2.2%	2.3%	2.5%	2.4%	2.5%	2.4%	2.2%
Symbols & Independent	1.7%	1.5%	1.6%	1.7%	1.6%	1.4%	1.4%	1.4%
Other Outlets	1.6%	1.7%	1.6%	1.8%	1.8%	1.8%	1.8%	1.8%
Ocado	1.1%	1.2%	1.3%	1.6%	1.7%	1.7%	1.7%	1.8%

Source: KANTAR Grocery Market Share. Figures shown are for the final reporting period in each calendar year  
A symbol group is a form of franchise of convenience shops, found primarily in the United Kingdom and Ireland.

## Comparison Goods

- 2.26 The comparison goods sector is currently being squeezed by a number of factors, including increasing operator costs and a reduction in discretionary spending as a result of increases in the cost of living.
- 2.27 Whilst the sector is continually evolving and there are a number of retailers performing well (including JD Sports, Next, Primark, and Zara), recent headlines have focused on failing retailers and store closures. High profile retailers that have struggled include Debenhams, which announced the closure of all 124 stores in December 2020, and the Arcadia Group, which owned Topshop, Topman and Dorothy Perkins. Arcadia Group announced the closure of around 500 stores in February 2021.<sup>10</sup> Furthermore, Intu Properties, one of Britain's biggest shopping centre owners, fell into administration in June 2020 after failing to secure an agreement with its creditors.<sup>11</sup>
- 2.28 More recently, Wilko entered into administration in August 2023 and ceased trading shortly after, and The Body Shop announced the closure of 75 stores at the end of February 2024, after falling into administration. More

<sup>8</sup> Article headlined 'Aldi claims it is increasingly shoppers' main supermarket for weekly shop', The Guardian, 8 September 2023.

<sup>9</sup> As set out in the press release headlined 'Lidl continues to search to secure sites for new stores', 24 April 2023 (<https://corporate.lidl.co.uk/media-centre/pressreleases/2023/lidl-continues-search-to-secure-sites-for-new-stores>).

<sup>10</sup> Article headlined 'After Topshop owner Arcadia's demise, what now for UK clothes shopping?' The Guardian, 13 February 2021.

<sup>11</sup> Article headlined 'Shopping centre owner Intu collapses into administration', The Guardian, 26 June 2020.

recently, WHSmith announced the closure of some of their stores in March 2025 prior to closing all of its high street stores later in the year and Homebase closed a number of stores throughout 2024.

- 2.29 Whilst the loss of some of the above names will have significant repercussions for certain towns (particularly those that have lost one or more of Debenhams, Marks & Spencer, or House of Fraser from their high street), some well-known retailers have failed to 'move with the times' and update their offer, accommodation, and online presence. This is partly a consequence of retailers struggling to reinvest in their business when margins are tight (or non-existent).
- 2.30 Many operators have also rationalised their portfolio with the aim of serving the UK by concentrating on larger centres, supplemented by a strong online presence. It will be interesting to see whether any permanent change in respect of working from home may act to counterbalance this 'polarisation' trend, given the prospect of fewer commuters travelling to larger centres and greater numbers of people spending the working day in and around their home. The impact on larger centres may be to reduce footfall, particularly within the week, and result in the shift in expenditure being directed to the smaller town, district, and local centres. Whilst this will be a positive for the smaller centres, larger centres may suffer as a result.
- 2.31 Whilst structural changes have had a material impact on the vitality and viability of many UK high streets, there are some beneficiaries. Notwithstanding Wilko's recent problems, some 'discount variety' operators – such as B&M Bargains, Home Bargains and Poundland – have taken advantage of lower rents and reoccupied a number of medium to large retail units. However, as evidenced by recent events, including the closure of Wilko, the discount variety market may be approaching capacity. As we go on to explore in more detail below, the ongoing competition of out of centre destinations for national multiple representation is continuing to have impacts on the performance of some high streets

## Leisure and Food & Drink

- 2.32 The greater availability of high street units appears to have helped stoke an entrepreneurial spirit in recent years, with a number of centres beginning to benefit from a greater focus on independent retailers and also modern markets, which are frequently focused around food and drink operators.
- 2.33 More generally, the food and drink sector was buoyed pre-pandemic by the success of mid-market national multiples, which expanded quickly across the UK. However, this market has become saturated in many locations and a number of high-profile operators have been in financial difficulty, including the closure of Byron Burger, Chiquito, and Frankie & Benny's branches. Given the problems suffered by such operators, the market has become more cautious and mid-market operators are picking new sites carefully as a result. Instead, we have seen a number of independent operators flourish, both before and throughout the pandemic, and a desire from customers to choose local operators over larger regional and national brands.
- 2.34 A further significant recent high street success story has been the resurgence of the town centre leisure sector, which has resulted in new cinemas being developed close to the shopping core and the emergence of 'competitive socialising' concepts, which include bowling, crazy golf, table tennis, darts, axe-throwing, escape rooms and other seemingly niche pursuits.
- 2.35 Cinema openings have been on the up in the early part of this century (until the Covid-19 pandemic) and 'boutique' cinema operators – including Curzon, Everyman, and The Light – are able to operate from smaller sites in town centres (partly as a consequence of digital technology). Town centre cinema development has successfully underpinned wider mixed-use developments, as food and drink operators are typically keen to locate in close

proximity to benefit from spin-off custom. New, innovative leisure operators have been particularly beneficial both in re-using existing difficult-to-let premises, and in driving the evening economy.

- 2.36 More generally, the gym market continues to perform well, with there now being around 7,200 health and fitness clubs across the UK, which are estimated to have a total turnover of approximately £2bn.<sup>12</sup> Around one in every seven Britons has a gym membership. Budget gyms are currently particularly popular, with operators such as Pure Gym, The Gym Group, and easyGym utilising a format that is based on low costs and high volume.

## The Night-Time Economy

- 2.37 The term night-time economy is used to describe a wide range of activities that (typically) take place after 5pm. This could range from a trip to the theatre or cinema, to a family meal, to a night out at a club. A successful night-time economy generally caters for a wide range of demographics and interests.
- 2.38 Creating a safe, vibrant and well-balanced evening and night-time offer is a challenge that can dramatically improve the overall health of a town centre and boost the economy.
- 2.39 The Association of Town and City Management ('ATCM') has identified a number of themes to help improve the attraction and operation of the night-time economy, which are summarised as follows:
- **Alive After Five** – This relates to revisions to trading hours to better suit customers' shopping needs and availability. A Retail Trading Hours Study commissioned by ATCM found that sales between 5 pm and 8 pm are typically 50% greater than those between 9 am and 11am. Revising trading hours to open and close later could increase sales by around 10% to 12%.
  - **Late Night Transport** – The lack of frequent, efficient and safe public transport late at night, or at least the perception of this being the case, could be having a detrimental effect on night-time economy and social scene. One way of increasing night-time visitor numbers is to promote late-night travel provision and its publicity.
  - **Purple Flag** – This is an accreditation scheme which recognises excellence in the management of town and city centres at night. Obtaining Purple Flag accreditation demonstrates that a town's night-time economy offers clean and safe environments, great bars and clubs, a variety of arts and cultural attractions, and excellent transport links.
  - **Evening Economy Ambassadors** – The ambassadors improve the evening and night-time experience in a town centre by liaising between visitors, police, door staff, licensees, and transport operators.
  - **Light Night** – This is an initiative where town or city centres stays open after dark for people to enjoy local shops and services within a wider cultural event involving music, art and, most importantly, through the lighting up of buildings and light-based art installations.
- 2.40 The above list is not exhaustive, and the development of a bespoke evening economy strategy can help prioritise and deliver events and initiatives which draw on a town centre's strengths and address weaknesses.

## Planning Reform on the High Street

- 2.41 One of the most impactful planning reforms in recent times has been the consolidation of a number of separate Use Classes under a single Class E 'Commercial, Business and Service' use. This update to the Town and Country

<sup>12</sup> 'Number of health clubs in Europe in 2020, by country' dataset, Statista, 27 October 2022.

Planning (Use Classes) Order 1987 (the 'UCO') came into effect in September 2020. The new Use Class combines shops, restaurants, offices, gyms and nurseries (amongst other uses) such that planning permission is no longer typically required to switch uses.

2.42 Furthermore, in March 2021, an update was made to the General Permitted Development (England) Order 2015. This allows for the change of use from Class E properties to residential from August 2021 (extending a right that had previously been restricted to office uses). This permitted development right is subject to maximum size requirements, the property having been in use as Class E for two years and having been vacant for three months. An application to the determining authority for 'prior approval' is also required for limited consideration of impacts relating to transport, contamination, flood risk, noise, light, and neighbouring amenity. Further limitations apply in Conservation Areas and for nurseries, as well as in areas covered by 'Article 4 directions' where permitted development rights are extinguished.

2.43 On 20 July 2021, paragraph 53 of a new iteration of the National Planning Policy Framework ('NPPF') set out limitations on the use of Article 4 directions. The then revised national policy seeks to qualify the areas in which it is justified to introduce Article 4 directions, limiting local authorities' ability to control development.

2.44 The changes in the application of Article 4 directions were first put forward in the January 2021 consultation for draft revisions to the NPPF. However, the actual policy provision differs from the initial consultation in a couple of key areas. Paragraph 53 of the previous NPPF of July 2021 recognised that the loss of the 'essential core of a primary shopping area' could result in wholly unacceptable adverse impacts on an area's vitality and viability. This was the Government's first acknowledgement of the potential for the permitted development rights to undermine the health of centres in the NPPF. The updated text also introduced a requirement for 'robust evidence' to support the removal of development rights. The most recent iteration of the NPPF, published in December 2024 and updated in February 2025, retains these changes.

2.45 This can be seen as generally good news for local authorities concerned about the erosion of retail and service uses, and the need to protect vulnerable centres from potentially poor-quality residential development. Protection of the vitality and viability of a high street or town centre against the adverse impacts of change of use is now established as justification for issuing an Article 4 direction.

## Out-of-Centre Retailing

2.46 Another key format of retailing (and provision of leisure uses) are out-of-centre retail warehouse destinations. Whilst local authorities need to retain control over out-of-centre provision from a planning perspective, such provision does play an important part in providing space for operators who may not be able to viably trade from in-centre locations. Such uses include 'bulky' retail operators, including DIY stores, electrical goods retailers, furniture stores and so on.

2.47 In their UK Retail Warehousing August 2023 Spotlight Report, Savills note that: 'from a retailer's point of view, there are definitely reasons to be cheerful. Generally, it appears that higher input and operating costs have, to some degree, been successfully passed onto the shopper. Added to this are some areas where costs are lower (such as business rates and rents).' In terms of the nature of the operators, it is the value orientated brands which continue to top the charts of the most acquisitive retail and leisure operators.

2.48 In this regard, Savills note that the retailers with a focus on essential product categories have continued to drive footfall to out-of-centre schemes, which remain at near parity with the levels seen pre-Covid. Furthermore, operators which focus on essential products have dominated the new openings, including Aldi and Lidl, Home Bargains, B&M Retail and leisure operators such as PureGym, Greggs and Starbucks.

- 2.49 In addition to the above, most out-of-centre shopping locations retain their apparent significant competitive advantages over town centres and high streets in terms of their supply of larger format modern outlets, their lower occupancy costs, extensive free parking and easy and convenient access to the surrounding highways and key arterial routes. This is still an attractive proposition for those retailers that are still seeking space in the current market, but the implications of the attraction of out-of-centre facilities on defined centres, needs to be monitored carefully and the ongoing ease of access, parking and overarching attraction of out-of-centre facilities can of course have implications for town centre operators and retail and leisure planning policy.

## Implications for the Blackpool and Wyre Authority Areas

- 2.50 Retail has been an industry under significant stress, as many retailers find themselves squeezed between rising costs and the increasing volume of sales over the internet. Such difficulties have, of course, been exacerbated by the Covid-19 pandemic and the cost-of-living crisis associated with rising energy prices and inflation. In response to this unpredictability, those operating in the market are forced to adapt quickly or otherwise face falling profits.
- 2.51 There will still be the need and demand for physical stores, despite the increase in shopping online. This is particularly the case for convenience goods sales in light of the fact that the online shopping orders are typically picked from the shelves of physical stores. In respect of comparison goods, there is a need for the offer to become more 'experiential' in order to encourage shoppers onto the high street, and to ensure that shopping is viewed as a pleasurable pastime. The shopping experience needs to evolve and diversify both to attract footfall and convert increased activity into sales. Independents clearly have an important role to play in adding interest and in providing differentiation between shopping venues.
- 2.52 In a market disrupted by continued changes in consumer behaviour, investing in the consumer experience is anticipated to be the key to success in securing resiliency in retail stores moving forward. Planning policy can play an important role in helping to future-proof city, town and village centres against the ongoing uncertainty.

## Blackpool Implications

- 2.53 The challenging economic conditions and growth in online sales have had a significant and permanent impact on consumer shopping and spending behaviour. This has created significant challenges for traditional 'bricks-and-mortar' retailing and the high street. Consequently national multiple retailers are having to constantly review and rapidly adapt their business strategies, requirements and store formats to keep pace with the dynamic changes in the sector and consumer demand.
- 2.54 Today, many of our traditional towns and shopping centres simply have too much retail space. The critical challenge over the short, medium and long term will be how to retain existing businesses, fill/replace the voids and attract new investment. The danger is that an increase in long-term vacancies in centres will lead to a 'spiral of decline,' which will further engender feelings of neglect and lack of investment confidence in town centres, and "push" more people to shop online.
- 2.55 In 2018, the Retail and Leisure Study noted that the centres within Blackpool faced a number of challenges, particularly from increasing competition from the internet, multichannel retailing, polarisation of retailing and out of centre retail and leisure developments. As such, one of the key recommendations for the Study was to ensure that the defined centres within the authority area provided an offer which distinguishes them from competing centres and other out of centre destinations.
- 2.56 The ongoing impact of both shopping online and shopping at larger out of centre destinations continues to impact Blackpool's centres. Often, operators are seeking a more modern, standard floorplate format which provide level,



open and accessible units which meet their business model requirements. Catchment areas, pass-by trade and wider requirements of these operators will also have implications on their choices of locations, and in some cases driving operators to take up floorspace at modern, and often out of centre commercial destinations.

- 2.57 However, tourism and the inflow of expenditure from visitors living outside of the authority area continues to be a vital element in helping to support the vitality and viability of Blackpool town centre and is in some ways, driving the nature of operators and the wider offer of the centre. This does not negate the need for the town centre to continue to provide for the authority's residents, and that day-to-day retail, leisure and service operators is key to continuing to attract residents into the centre.
- 2.58 Blackpool town centre is undergoing substantial investment to transform its economic and social landscape, with a series of ambitious projects designed to enhance its role as a regional hub for business, education, and leisure. Central to these efforts is the Talbot Gateway regeneration scheme, a multi-phase development that is revitalising the heart of the town.
- 2.59 Phase one of the project, completed in 2014, delivered the Number One Bickerstaffe Square Council Office, a Sainsbury's supermarket, and the refurbishment of a 650-space multi-storey car park. Building on this success, phase two has introduced a new Holiday Inn hotel and a tramway extension, enhancing sustainable public transport in Blackpool. The extension allows commuters and visitors to travel directly from Fleetwood to Blackpool North Station, connecting seamlessly with various destinations across the town via the Promenade. This improvement has increased transport capacity and frequency, particularly along the busy seafront tramway network.
- 2.60 Phase three, also now completed, has seen the delivery of a seven-storey, 215,000-square-foot sustainable office building. This development houses a Civil Service Hub, consolidating 3,500 Fylde-based civil service jobs into central Blackpool. Located west of Cookson Street, the new hub is set to increase footfall and inject renewed vitality into the area. Looking ahead, phase five includes approved plans (ref: 24/0215) for a new office building adjacent to Blackpool North Station, on a site cleared since the demolition of the Apollo 2000 store. This development, approved in May 2024 and now commenced on site, will further bolster the town's business infrastructure.
- 2.61 A pivotal component of Blackpool's long-term vision is the Multiversity, forming phase four of the Talbot Gateway project. An outline planning application was approved in May 2024, with Blackpool Council actively acquiring properties to facilitate the scheme. Over 60% of the required properties have already been secured, and a Compulsory Purchase Order has been confirmed. A recent public inquiry has assessed the suitability of the site, which is backed by Town Deal funding. Once delivered, the Multiversity will provide a state-of-the-art educational facility to drive skills development, innovation, and collaboration with local businesses.
- 2.62 Another major success story is the refurbishment of Abingdon Street Market, which reopened in May 2023 as a vibrant food and retail destination. Featuring an open-plan seating area, six street food vendors, two bars, a coffee house, and ten independent retail units, the market has become a thriving community hub. Events such as the 'Blackpool Makers Market' and the Blackpool Record Fair have further boosted its popularity and drawn hundreds of visitors and supporting local businesses.
- 2.63 Tourism and leisure remain integral to Blackpool's economy, and the town's regeneration momentum is set to continue into 2025. Significant milestones in 2024 include the completion of the Holiday Inn hotel, tramway extension, Showtown museum, and the Backlot Cinema and Diner. In 2025, further developments will include the



demolition of the former police station and courts, paving the way for new leisure opportunities, and the completion of the £100 million Civil Service Hub on Cookson Street.

- 2.64 New residential and hospitality projects are also adding to the town centre's transformation. Plans (ref: 24/0591) have been approved to convert the upper floors of The Albert and The Lion pub, located next to Blackpool Tower, into 65 apartments. The development, set to retain the ground floor and basement as a JD Wetherspoon pub, is expected to boost footfall and benefit local businesses. Additionally, an outline application (ref: 24/0131) for a hotel adjacent to the Winter Gardens was approved in June 2024. The hotel, to be built on a current car park between Adelaide Street, Leopold Street, and Alfred Street, will support the Winter Gardens by providing accommodation for conference attendees, enhancing Blackpool's appeal as a conference destination.
- 2.65 It is clear therefore that on the back of the wider commercial market implications including the growth in online spending and the closure of some key operators (or indeed the relocation to out of centre sites), the Council and other stakeholders have recognised the importance of exploring alternative uses within the centre to revitalise areas of the town centre, activating otherwise underutilised brownfield sites, and bringing much needed footfall and expenditure into the centre. These developments - along with future aspirations within the centre – will help to ensure that the vitality and viability of the centre is improved in the future and that footfall is still attracted to the centre.
- 2.66 The smaller centres across the authority area are still important in providing for the day-to-day shopping, leisure and service requirements of residents within Blackpool, and often provide for the wider community facilities which out of centre schemes cannot typically deliver. Often, these are anchored by convenience operators of a variety of scales, drawing residents into the centres and in most cases, encouraging trips to other operators within the same centres. Although the out of centre development can have some implications in terms of the qualitative offer of the smaller centres, it is clear that the district centres across the borough provide for a more day-to-day need for residents, which out of centre developments typically cannot provide for.

## Wyre Implications

- 2.67 Looking at the Wyre authority area, the trends summarised above have a number of potential implications for retail and leisure provision. The Borough's principal centres range in scale and type from the modest-sized market towns of Garstang and Poulton-le-Fylde to the larger and more urbanised town centres of Cleveleys and Fleetwood. These centres tend to serve localised and relatively small catchments focussed on the convenience, leisure and service offers, although Cleveleys and Fleetwood also attract some expenditure and footfall from coach trips and other tourist trade.
- 2.68 As we go on to explore in more detail later in this Study, it is evident that the town centres benefit (to varying degrees) from the presence of anchor convenience goods retailers within or around their boundaries. Wyre's grocery market is relatively self-contained, with the proportion of shopping trips and convenience expenditure attracted to destinations within the authority area being high and with good retention rates within each zone. The Study goes on to identify a degree of overtrading in some of Wyre's major foodstores, indicating that there is perhaps both a quantitative and qualitative demand for additional convenience operator representation in some parts of the authority area.
- 2.69 In this context, we note that a number of grocery operators remain acquisitional. Since the preparation of the most recent Retail Study covering the Wyre Borough in 2011, Aldi has opened new stores within Garstang town centre and within Poulton-le-Fylde town centre and expanded its store in Cleveleys town centre. Lidl's website<sup>13</sup>

<sup>13</sup> [New Store Site Requirements \(realestate-lidl.co.uk\)](https://www.lidl.co.uk/retailers/new-store-requirements), consulted on 24 January 2025.

identifies that it has a current outstanding requirement for new stores in Fleetwood and Thornton. It will be important to try to direct any future foodstore requirements to central, sustainable locations which have the potential to support linked trips to in-centre retailers and service providers (in line with 'town centre first' principles).

- 2.70 While a good number of day-to-day comparison products are sourced close to home, those residing within the Wyre authority area tend to travel outside of the Borough at higher rates for non-food shopping than for convenience goods. In this regard, Blackpool destinations continue to play an important role in meeting the needs of Wyre residents, so that comparison market shares across the Study Area as a whole remain relatively high.
- 2.71 Nonetheless, the abovementioned changes in the national comparison market have clearly impacted on Wyre's town centres since the last Retail Study was undertaken. While Cleveleys and Fleetwood remain important local destinations for non-food shopping, the latter in particular has seen a reduction in the scope of its offer since 2011.
- 2.72 This decline will be partly attributable to the growth in online spending and continued competition from major comparison destinations outside the Study Area, such as Preston and Lancaster. A significant factor, however, is the centre's proximity to the out-of-centre Affinity Lancashire Outlet Shopping facility (formerly known as Freeport), which has seen a corresponding improvement in its own comparison provision over the same period.
- 2.73 Affinity clearly goes some way to meeting the needs of Wyre residents, and there are therefore wider benefits to continuing to support its diversity and offer. However, priority should be given to improved connectivity between Affinity and Fleetwood town centre in order to drive linked trips and support the overall vitality and viability of the town centre, ensuring that the two destinations complement rather than compete with each other.
- 2.74 Due to changes in the retail sector, it will be important to consider whether there are any opportunities for the principal centres within Wyre to provide a greater experiential offer to attract activity and encourage visitors to stay for longer periods. The independent and food and drink sectors are likely to be a particularly important in this regard, given the growing importance of these uses as a primary attractor of footfall.
- 2.75 Poulton, Cleveleys and, to a lesser extent, Garstang are local food and drink destinations with distinct identities, and their leisure operators play a key role in supporting the overall daytime and evening economies of these centres. Fleetwood is relatively underprovided for, in terms of both its floorspace and the proportion of its units occupied by food and beverage traders. Across all centres, measures for the adaptation and diversification of the food and drink offers should be encouraged in order to drive footfall, expenditure and activity both during the day and at night.
- 2.76 In general, there is a need for flexibility in planning for town centres, so they can adapt to future needs and accommodate a wider range of uses. As we go on to explore in greater detail in this report, we recommend that policies are sufficiently flexible to allow for a wide range of town centre uses beyond retail, and that consideration is given to repurposing surplus stock to support new residential, leisure and community uses.

## 3. Planning Policy Context

- 3.1 In order to shape the direction of this Study, it is helpful to understand relevant retail and town centre planning policy at a national and local level. As such, we first summarise national planning policy of relevance before considering retail and town centre development plan policy as set out in the current development plan. We also consider changes to the Use Classes Order and the application of permitted development rights to town centre uses.

### Revised National Planning Policy Framework

- 3.2 The most recent iteration of the National Planning Policy Framework ('NPPF') was published in December 2024 and updated in February 2025. The NPPF reflects the fact that the traditional role of town centres has been somewhat undermined by structural changes in the retail sector, and that there may be a need to plan for a more diverse range of uses going forward. As such, the NPPF advocates a more flexible policy framework to support the future vitality and viability of town centres.
- 3.3 NPPF policies are considered on a thematic basis below.

#### Plan-Making

- 3.4 Paragraph 20 of the NPPF indicates that development plans should set out an overall strategy for the pattern, scale and quality of development, including policies to deliver retail, leisure and other commercial development. Paragraph 32 states that the preparation and review of all policies should be underpinned by relevant and up-to-date evidence. This should be proportionate and consider relevant market signals.

#### Building a Strong, Competitive Economy

- 3.5 Paragraph 85 of the NPPF indicates that planning policies and decisions should help create the conditions in which businesses can invest, expand, and adapt. Significant weight should be placed on the need to support economic growth and productivity, taking into account both local business needs and wider opportunities for development.

#### Ensuring the Vitality of Town Centres

- 3.6 Paragraph 90 specifically relates to planning for town centres. It states that:

**'Planning policies should:**

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

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

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

- 3.7 The requirement to plan to meet needs across a minimum ten-year period represents a change from the previous NPPF which required town centre needs to be met in full across the entire plan period.
- 3.8 In addition, it is notable that the NPPF Annex 2 Glossary fails to make any reference to the designation of primary and secondary frontages. Page 32 of the Government Response to the Draft Revised National Planning Policy Framework Consultation<sup>14</sup> indicates that, whilst the revised NPPF has removed the expectation in national planning policy that such frontages must be defined, this does not necessarily preclude authorities from doing so where their use can be justified. However, it is evident that the general intention is to provide for more flexibility through a less prescriptive approach to land use.
- 3.9 Paragraph 94 of the NPPF states that it is appropriate to identify thresholds for the scale of edge of centre and out-of-centre retail and leisure development that should be the subject of an impact assessment. Any such threshold policy applies only to the impact test. All planning applications for main town centre uses that are not in an existing centre and not in accordance with an up-to-date development plan will generally be the subject of the sequential test.

### Promoting Healthy and Safe Communities

- 3.10 Paragraph 97 states that planning authorities should refuse planning applications for hot food takeaways and fast food outlets in the following instances:
1. Within walking distance of schools and other places where children and young people congregate, unless the location is within a designated town centre; or
  2. In locations where there is evidence that a concentration of such uses is having an adverse impact on local health, pollution or anti-social behaviour.
- 3.11 Paragraph 98 seeks to support the social, recreational, and cultural facilities and services communities need. The guidance states that planning policies and decisions should:
- ‘Plan positively for the provision and use of shared spaces, community facilities (such as local shops, meeting places, sports venues, open space, cultural buildings, public houses, and places of worship), and other local services to enhance the sustainability of communities and residential environments;
  - take into account and support the delivery of local strategies to improve health, social and cultural well-being for all sections of the community;
  - guard against the unnecessary loss of valued facilities and services, particularly where this would reduce the community’s ability to meet its day-to-day needs;
  - ensure that established shops, facilities, and services are able to develop and modernise, and are retained for the benefit of the community; and
  - ensure an integrated approach to considering the location of housing, economic uses and community facilities and services.’

<sup>14</sup> Published July 2018.

## Ensuring the Vitality of Town Centres Planning Practice Guidance

- 3.12 The Town Centres and Retail Planning Practice Guidance ('the Town Centres PPG') was published in July 2019 and thereafter updated in September 2020. It provides additional direction in respect of how retail and town centre planning policy should be applied in respect of plan-making and decision-taking. The Town Centres PPG affirms the Government's aspiration to support town centres in order to generate employment, promote beneficial competition and create attractive, diverse places where people want to live, work and visit.
- 3.13 Paragraph 004 of the Town Centres PPG indicates that a local planning authority's strategy for their town centres should include:
- The realistic role, function and hierarchy of town centres over the plan period. Given the uncertainty in forecasting long-term retail trends and consumer behaviour, this assessment may need to focus on a limited period (such as the next five years) but will also need to take the lifetime of the plan into account and be regularly reviewed.
  - The vision for the future of each town centre, including the most appropriate mix of uses to enhance overall vitality and viability.
  - The ability of the town centre to accommodate the scale of assessed need for main town centre uses, and associated need for expansion, consolidation, restructuring or to enable new development or the redevelopment of under-utilised space.
  - How existing land can be used more effectively – for example, the scope to group particular uses such as retail, restaurant and leisure activities into hubs or for converting airspace above shops.
  - Opportunities for improvements to the accessibility and wider quality of town centre locations, including improvements to transport links in and around town centres, and enhancement of the public realm.
  - What complementary strategies are necessary or appropriate to enhance the town centre and help deliver the vision for its future, and how these can be planned and delivered. For example, this may include consideration of how parking charges and enforcement can be made proportionate.
  - The role that different stakeholders can play in delivering the vision. If appropriate, it can help establish the level of cross-boundary/strategic working or information sharing required between both public and private sector groups.
  - Appropriate policies to address environmental issues facing town centres, including opportunities to conserve and enhance the historic environment.
- 3.14 This Study seeks to provide a high-level authority-wide retail and leisure strategy, which will provide an overall context to the determination of planning applications for such uses and will support the Council's future development plan policy. The Study will also help underpin future town centre-specific strategies or masterplans.
- 3.15 Paragraph 006 of the Town Centres PPG identifies a series of key indicators of relevance in assessing the health of a centre over time. The indicators allow the role, performance, and function of centres to be monitored and are considered in greater detail at Section 4 of this report (which specifically addresses the vitality and viability of town centres across the two local authorities).

## Use Classes Order

- 3.16 Significant changes to the Use Classes Order have been enacted through the Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020, which came into force on 1 September 2020.
- 3.17 The amendments include the revocation of Parts A and D, and the introduction of three new Use Classes, these being Classes E, F1 and F2. The Government's objective is that the changes will support the revival of the high

street and allow for greater flexibility in changing uses within town centres without the need for planning permission.

**3.18** In addition to the three new Use Classes, the changes also result in some changes in respect of uses classified as sui generis. In practical terms, the changes comprise:

- **Use Class E** – Commercial, business and service uses to include: shops or retail; cafes or restaurants; financial services; professional services; any service appropriate to provide in a commercial, business or service locality; indoor sports, recreation or fitness; medical or health services; crèche, day nursery or day centre; and offices.
- **Use Class F1** – Learning and non-residential institutions to include any non-residential use for the: provision of education; display of works of art; museum; public library or public reading room; public hall or exhibition hall; for or in connection with public worship or religious instruction; or, as a law court.
- **Use Class F2** – Local community uses to include: a shop selling mostly essential goods, including food, no larger than 280 sq.m and where there is no other such facility within 1,000 metres radius of the shop's location. A hall or meeting place for the local community, an area or place for outdoor sport or recreation and an indoor or outdoor swimming pool or skating rink.
- **Sui Generis** – Use within this Class now includes a public house, wine bar or drinking establishment; a drinking establishment with expanded food provision; a hot food takeaway for the sale of hot food where consumption of that food is mostly undertaken off the premises; live music venue; cinema; concert hall; bingo hall; or dance hall.

**3.19** The introduction of Class E is significant and places a wide range of uses including retail, food, financial services, gyms, healthcare, nurseries, offices, and light industry into a single use class. Unless restrictive planning conditions extinguish the provisions of Class E, the ability to change the commercial use of premises without planning permission allows centres to evolve in a flexible manner.

**3.20** However, the provisions of the Use Classes Order are not linked to any spatial considerations. As such, the expanded Use Class E applies equally to both town centres and out-of-centre locations, and there may be unintended consequences in providing for additional flexibility across Class E outside of town centres. Accordingly, it may be necessary for the Council to apply restrictive conditions to certain forms of development to restrict the authorised use to that which has been justified in the application submission. This will help ensure that unacceptable impacts do not arise from future Class E development.

### Town Centre Use Permitted Development Rights

**3.21** An amendment was made to the General Permitted Development) (England) Order 2015 (the 'GPDO') in March 2021. This allows for the change of use from Class E properties to residential from August 2021 (extending a right that had previously been restricted to office uses). This permitted development right is subject to maximum size requirements, the property having been in use as Class E for two years, and the property having been vacant for three months. In addition to this, 'prior approval' for the change of use must be sought from the planning authority. Restrictions on this right apply in conservation areas and for nurseries and health centres, as well as in areas that are covered by an Article 4 direction.

## Local Planning Policy Context

### Wyre Local Planning Policy Position

- 3.22 On the 26 January 2023 Wyre council adopted the Wyre Local Plan (2011-2031) (incorporating partial update of 2022) (the “Local Plan”). Wyre's new Local Plan is a revised replacement of the Wyre Local Plan (2011-2031) retaining all of its policies except those revised by the partial update, and which included a minor update to the retail policies to reflect that Use Class B1 is now part of Use Class E(g), and that the former Use Class A1 is now part of Use Class E(a).
- 3.23 Section 8.4 of the Wyre Local Plan (2011-2031) relates to the town, district, local and neighbourhood centres within Wyre. Paragraph 8.4.1 notes that the town centres are important in providing space for retail, leisure and culture. A healthy, vibrant town centre raises the confidence of local residents and businesses. The Local Plan sets out a hierarchy of different centres within the Borough, based on their size and role in the Borough. The scale of retail investment should be commensurate with the position of the centre in the hierarchy.

- 3.24 Policy EP4 states that:

**‘Retail, leisure and other main town centre uses will be directed towards the Borough's existing centres in accordance with the following hierarchy and in accordance with policy EP5 (Main Town Centre Uses)**

**Planning permission will only be granted for development which is appropriate in scale and commensurate with the centre's position and function in the hierarchy. Town and district centres as defined by the hierarchy above are the principal locations for new convenience and comparison retail and other town centre development, in particular that of a larger scale.**

**Within defined centres a diversity of uses will be encouraged to maximise the centres vitality and viability subject to policies EP5 (Main Town Centre Uses) and EP6 (Development in Defined Primary and Secondary Shopping Frontages). Development which will adversely affect the vitality and viability of a defined centre will not be permitted in order to ensure the sustainability of communities.**

**Local and neighbourhood centres and isolated local convenience stores are important for the sustainability of the communities they serve. Development which will cause their loss or affect their vitality will only be permitted where the local area is served by alternative provision or the property was marketed in accordance with Policy SP6 (Viability)’.**

- 3.25 The hierarchy set out in Part 1 of Policy EP5 places the Borough's four town centres of Fleetwood, Cleveleys, Poulton-le-Fylde and Garstang at the highest tier. These are followed by a range of district centres; then local centres; then Neighbourhood Centres/Parades; and, at the lowest tier, freestanding convenience shops within urban areas and defined rural settlements.

- 3.26 Policy EP5 then relates to main town centre uses, and states:

**Proposals for new retail development and other main town centre uses (including extensions and change of use) which are appropriate in scale, role and function will be permitted within Wyre's defined town, district, local and neighbourhood centres where they accord with this policy as a whole.**

#### **Scale of Retail Proposals**

**Within defined centres new retail development will be permitted provided that the development, in terms of the overall scale of additional floorspace proposed and the size of individual units within it, is appropriate to the position of the centre concerned within the hierarchy of centres in Policy EP4 (Town, District, Local and Neighbourhood Centres).**

#### **Sequential Test**

**Planning permission for new retail development outside the Primary Shopping Areas of town centres and in the district, local and neighbourhood centres as identified on the adopted Policies Map, or for other main town centre uses outside**



defined centres will only be granted if the following criteria are met: a) The development is specifically supported by another policy in the Local Plan; or b) It is demonstrated that no sequentially preferable site is available which includes being available within a reasonable timescale to accommodate the development; and that in discounting any sequentially preferable site, the developer / operator has applied a sufficiently flexible approach to their requirement in respect of scale, format and car parking provision.

Where an edge or out-of-centre development is justified under this policy, preference will be given to accessible sites which are well connected to an existing town centre; and appropriate measures will be required to maximise connectivity between the development and the centre.

#### Assessing Impact

Proposals which are not specifically supported by other policies and are not in a town or district centre as defined on the adopted Policies Map, and which will create additional floorspace at or above the levels set out below, will be required to be accompanied by an impact assessment.

- a) 500m<sup>2</sup> gross for any new retail (comparison and convenience) floorspace;
- b) 2,500m<sup>2</sup> gross for new leisure proposals.

Where an impact assessment is required, proposals will only be granted planning permission where it is demonstrated that in relation to Fleetwood there will be no unacceptable impact and in relation to other centres that there is no significant adverse impact on the vitality and viability of existing centres. In making its assessment on this issue the Council will take account of the following main issues along with any that are specific to the development in question:

- a) The impact of the proposal on existing, committed and planned public and private investment, in a centre or centres in the catchment of the proposal;
- b) The impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and the wider area, up to five years from the time the application is made. For major schemes where the full impact will not be realised in five years, the impact should also be assessed up to 10 years from the time the application is made; and
- c) The ability of the impact to be mitigated through measures secured through planning conditions or a planning agreement.

3.27 Policy EP6 then relates to development in defined primary and secondary frontages and states:

1. **Proposals for development not falling into Use Class A1 (now part of use class E(a)) involving ground floor units in identified Primary Frontages will be permitted provided all the criteria below are met:**
  - a) A minimum of 70% of the defined length of frontage in the block would remain in A1 use (now part of Use Class E(a)) taking into account unimplemented planning permissions for changes of use; or the premises have been marketed for a class A1 use (now part of Class E(a)) in accordance with Policy SP6 (Viability);
  - b) The proposed use is complementary to the primary shopping function of the frontage and will contribute to vitality and viability;
  - c) The proposed use would not result in three adjoining non-A1 uses (now part of use class E(a)) in the block;
  - d) An active pedestrian level shopfront is retained/provided.
2. **Proposals for development not falling into Use Class A1 (now part of use class E(a)) involving ground floor units in identified Secondary Frontages will be permitted provided all the criteria below are met:**
  - a) A minimum of 50% of the defined length of frontage in the block would remain in A1 use (now part of use class E(a)) taking into account unimplemented planning permissions for changes of use; or the premises have been marketed for a class A1 use (now part of use class E(a)) in accordance with Policy SP6 (Viability);



- b) The proposed use is complementary to the secondary shopping function of the frontage and will contribute to vitality and viability;
- c) An active pedestrian level shopfront is retained/provided.

3.28 'Complementary' uses for the purposes of Parts 1(b) and 2(b) of Policy EP6 are defined as those in the [former] Use Classes A2 to A5 and other town centre uses.

3.29 Policy EP7 relates to local convenience stores and states:

1. Within defined settlement boundaries planning permission will be granted for convenience retail developments, which are not within existing defined centres or specifically allowed for by other policies, where all the following criteria are met:
  - a. The proposal caters for local needs only and individual units do not exceed a maximum of 280 sq.m net sales area;
  - b. There are no available existing units in class A (now part of class E(a)(b)(c) and Sui Generis) use within reasonable walking distance, typically 500 metres of the proposal, which would be capable of accommodating the development and serving an area currently not being served;
  - c. Either the development is within, or immediately adjacent to, an existing group of local shops, or there are no other shopping facilities providing for local need within a reasonable walking distance (typically 500 metres) of the proposal.

3.30 Section 9 of the Local Plan then sets out the site allocations. The following policies below are Wyre's site allocations policies in the currently Adopted Wyre Local Plan 2011-31 (incorporating partial update of 2022). Each of the allocations policies contain Key Development Considerations (KDC's). The policies containing retail KDC's are set out in the table below with the text and number of the relevant KDC.

Table 3.1: Site Allocations Summary

Site Allocation Policy	KDC wording in the allocations policy	Status
SA1/2 - Lambs Road/Raikes Road, Thornton	7. The development of the site should include a small convenience store of 280 sq.m net sales area.	The site received permission for a retail store of 280 sq.m through application reference 22/00781/FULMAJ. It is understood that Central Co-op store is now trading.
SA1/11 - Inskip Extension	7. Subject to viability the development of the site should include a small convenience store of not more than 500sq.m. gross.	The outline planning permission for the site included a parcel of land for a convenience store (reference 16/00481/OUTMAJ). Reserved matters has been approved for the housing which is now built out. The land for the convenience store is still earmarked for such use but has not yet been built.
SA1/23 - Land off Garstang Road, Barton	10. Development of the site should include a small convenience store of 280 sq.m net sale area .	The site has now been fully developed for housing.
SA3/2 - Joe Lane, Catterall	2. The development must include a local centre to include a convenience store of not more than 500sqm (gross). Gross floor space within A - class uses (now part of class E(a)(b)(c) and Sui Generis) at the local centre	This Local Centre has been delivered and is known as Beacon Retail Park, Catterall.

Site Allocation Policy	KDC wording in the allocations policy	Status
	<i>should not exceed 1500 m2 and each individual unit should not exceed 500m2 (gross).</i>	
SA3/3 - Land West of Great Eccleston, Great Eccleston	<i>8. The development should include a new primary school, health centre, community hall and a small local convenience store of not more than 400 sq.m gross floor area. The location of these facilities should be determined through the masterplan to maximise their accessibility by new and existing residents and the benefits of co-location such as shared car parking.</i>	The 'community hub' to contain a new primary school, health centre, community hall and a small local convenience store on this site currently has outline planning permission (reference 19/00860/OULMAJ). The hub is required as part of a masterplanned approach to the whole development. The land for the hub including retail unit is reserved for such uses through the allocation policy and outline permission.
SA3/4 - Forton Extension, Forton	<i>7. The development should include a neighbourhood centre that incorporates a small local convenience store of not more than 500 sq.m. gross floor area, a community hall and a health facility if required. The location of these facilities should be determined through the masterplan to maximise their accessibility by new and existing residents and the benefits of co-location such as shared car parking.</i>	The policy requires a neighbourhood centre incorporating a local convenience store. Outline consent has been approved (reference 23/01031/OULMAJ). This site also has a masterplan. Reserved matters has been approved for the housing which is now being built. The land for the neighbourhood centre including a convenience store is still earmarked for such use.
SA3/5 - Land West of the A6, Garstang (aka Nateby Crossing)	<i>4. The development should include a small convenience store of 280 sq.m net sales area.</i>	This is a mixed use site with allocation policy requiring housing, employment land and convenience store.  The site has reserved matters consent (reference 20/00340/RELMAJ) including commercial elements of the scheme.
SA4 – Hillhouse Technology Enterprise Zone, Thornton	<i>Allocations Policy description states:  Other complementary commercial uses including an element of small convenience A1 retail store of not more than 400 sq.m. to support the residential and employment development would be acceptable.</i>	The policy requires a retail store of not more than 400 sq.m to support the residential and employment development would be acceptable. Outline consent was granted (reference 22/00845/OUT) for the construction of up to 750 sq.m of floorspace for flexible use within Class E (a, b, c, d, e and g).

## Blackpool Local Planning Policy Position

- 3.31 The Blackpool Local Plan Part 1: Core Strategy 2012-2027 (Core Strategy) was adopted in January 2016 and forms the main part of the development plan for the Borough.

- 3.32 The Local Plan Part 2 allocates sites for development, safeguarding or protecting and sets out a suite of development management policies to guide appropriate development. It was adopted by the council on 22 February 2023.

### Local Plan Part 1

- 3.33 Policy CS1 of the Core Strategy establishes the overarching spatial focus for Blackpool as regeneration and supporting growth. It identifies three locations within the inner area of Blackpool as the focus for growth, development and investment, namely Blackpool town centre, the resort core and neighbourhoods within the inner areas. The three strategic sites within the town centre (Central Business District, Winter Gardens, and Leisure Quarter) are specifically identified. The policy also supports growth in South Blackpool.
- 3.34 Policy CS4 of the Core Strategy relates to retail and other main town centre uses. The policy has been drafted to protect the vitality and viability of the town centre and to successfully position it as the first choice shopping destination for Fylde Coast residents. The Policy states:
1. In order to strengthen Blackpool Town Centre's role as the sub-regional centre for retail on the Fylde Coast, its vitality and viability will be safeguarded and improved by:
    - a) Focusing new major retail development in the town centre to strengthen the offer and improve the quality of the shopping experience
    - b) The preparation and implementation of a Town Centre Strategy and Action Plan, working with stakeholders to arrest decline and restore confidence in the town centre
  2. For Town, District and Local Centres within the Borough, retail and other town centre uses will be supported where they are appropriate to the scale, role and function of the centre.
  3. In edge of centre and out of centre locations, proposals for new retail development and other town centre uses will only be permitted where it can be demonstrated that:
    - a) It is a tourism attraction located in the Resort Core in accordance with policy CS21; or
    - b) There are no more centrally located/ sequentially preferable, appropriate sites available for the development; and
    - c) The proposal would not cause significant adverse impact on existing centres; and
    - d) The proposal would not undermine the Council's strategies and proposals for regenerating its centres; and
    - e) The proposal will be readily accessible by public transport and other sustainable transport modes
  4. The Council, through the Site Allocations and Development Management DPD, will identify a range of sites for new retail development in Blackpool Town Centre to allow for new comparison goods floorspace over the plan period.
- 3.35 Blackpool's Retail Hierarchy is set out at Figure 13 of the Core Strategy. Blackpool town centre is at the highest tier; followed by the district centres of South Shore, Bispham, Highfield Road, Layton, and Whitegate Drive; and with the lowest tier comprising the various local centres located across the Borough and shown on Figure 14 of the Core Strategy.
- 3.36 Chapter 17 of the Core Strategy sets out the policies for specific strategic sites through with the regeneration of Blackpool Town Centre and the Resort Core will be achieved. The policies in this section are:
- **Policy CS17: Blackpool Town Centre**, which seeks to re-establish the town centre as the first choice shopping destination for Fylde Coast residents and to strengthen it as a cultural, leisure and business destination for residents and visitors. It states that assistance will be provided to assemble sites and

properties where required to facilitate major redevelopment. In addition, the policy supports new development, investment and enhancement which helps to re-brand the town centre by:

- Strengthening the retail offer with new retail development, with the principal retail core being the main focus for major retail development
  - Introducing quality cafes and restaurants to develop a café culture
  - Conserving and enhancing key heritage and entertainment assets within the town centre and complementing these with new innovative development
  - Growing an office sector to create an attractive centre to do business
  - Enhancing the quality of buildings, streets and spaces and connecting the different areas of the town centre, including the seafront, to improve pedestrian movement and improve connections with adjoining resort and residential areas
  - Improving access to the town centre with vibrant and welcoming multi-modal transport gateways
  - Introducing a high-quality residential offer in the longer term
- **Policy CS18: Winter Gardens**, which, inter alia, promotes major refurbishment to enhance the appeal and status of the Winter Gardens as a year-round entertainment, leisure, and conference venue. It supports the following uses: improved theatre, conference and exhibition facilities; leisure and entertainment uses; limited retail uses; hotel/serviced apartments; and improved car and cycle parking.
  - **Policy CS19: Central Business District (Talbot Gateway)**, which encourages the comprehensive redevelopment of the Central Business District for mixed-use development which will become an important anchor for the north of the town centre; providing a welcoming arrival experience, connecting with the wider town centre and complementing its retail offer. The policy supports: a public transport interchange around a re-modelled railway station and enhanced pedestrian environment; retail development that supports the existing major foodstore, including cafes and restaurants; offices; police headquarters; law court; improved public car park provision for the wider town centre; hotels; residential development; and proposals to improve the appearance of existing buildings.
  - **Policy CS20: Leisure Quarter (Former Central Station Site)**, which aims to secure the comprehensive redevelopment of the entirety of this site for major leisure development of national significance; where the cumulative impact of a single or group of leisure uses will provide a compelling new reason to visit Blackpool. The policy includes a number of development requirements, including the need to not undermine existing resort core uses and attractions. It also supports complementary leisure uses, hotel development, ancillary retail, parking and servicing that would add value and support the major leisure development.
  - **Policy CS21: Leisure and Business Tourism**, which seeks to strengthen Blackpool resort's appeal to attract new audiences year-round. Uses that will be supported, where they meet the requirements detailed in the policy, include: new tourism attractions; new visitor accommodation; the improvement and enhancement of important existing tourist attractions; the improvement of existing holiday accommodation and the conversion of lower quality guesthouses to residential accommodation where appropriate; new development along the promenade's built frontage to enhance the appearance of the seafront; and the enhancement of existing and promotion of new venues and events spaces. Outside the resort core and town centre, the Council will support new tourism investment that is predominantly focused on existing outdoor leisure and recreation facilities which strengthens the wider resort offer and does not undermine resort regeneration.
  - **Policy CS22: Key Resort Gateways**, which promotes further improvement, remodelling and environmental enhancement of Central Corridor as a strategic gateway to Blackpool and attractive point of arrival; and proposals for improvement and development to regenerate Central Drive, Lytham Road, Dickson Road and Talbot Road as prominent and attractive gateways to the resort and town centre.

- **Policy CS23: Managing Holiday Bed Space**, which seeks to achieve an economically viable level of quality holiday accommodation by managing a reduction in the oversupply of poor-quality holiday bedspaces.

## Local Plan Part 2

3.37 With regard to relevant policies in the Local Plan Part 2, Policy MUSA1 'Town Centre Mixed Use Site' allocates land at Church Street in the town centre for a mixed-use development including a discount foodstore of up to 2,500 sq.m gross and a multi-storey car park. At time of writing, the site has not been developed for these purposes and is occupied by a surface-level car park, and various other properties. In February 2023, however, Blackpool Council's Executive Committee resolved to take measures, including the use of compulsory purchase powers, if necessary, to deliver the multi-storey car park element of the allocation.

3.38 Policy DM6 of the Local Plan Part 2 supports residential uses in the town centre, provided that they are in accordance with other policies in the Local Plan. Residential use which includes the ground floor frontage is acceptable in principle in the following streets (all of which are at the periphery of the town centre):

- Springfield Road
- Cookson Street
- Edward Street
- Counce Street – North Side only
- Milbourne Street
- Lord Street (1-15)
- Abingdon Street (north of Talbot Road)
- Queen Street (east of Abingdon Street)

3.39 Policy DM11 of the Local Plan Part 2 relates to primary frontages and states:

**1. Proposals for the following uses will be permitted within the Primary Frontages as identified on the Policies Map:**

- i. retail (E(a));
- ii. restaurants and cafes (E(b));
- iii. appropriate leisure, residential (C3), hotel (C1) or office (E(g)(i)) uses at upper floor level;
- iv. civic space/open space.

**2. Uses that do not fall within (a) to (d) will not normally be permitted.**

3.40 Policy DM12 then relates to secondary frontages and states:

**1. Proposals for the following uses will be permitted within the Secondary Frontages as identified on the Policies Map:**

- a. retail (E(a));
- b. professional and financial services (E(c));
- c. restaurants and cafes (E(b));
- d. leisure;
- e. hotel (C1);
- f. residential (C3) or office (E(g)(i)) uses at upper floor level;
- g. civic space/open space.

**2. Uses that do not fall within (a) to (g) will not normally be permitted.**

3.41 Policy DM13 concerns betting shops, adult gaming centres and pawnbrokers in the town centre. To ensure that Blackpool Town Centre's shopping areas (beyond the primary and secondary frontages) provide a diverse and balanced range of shop units, the policy states that the Council will seek to manage the concentration of amusement centres, betting shops and pawnbrokers. Any proposal for a new betting shop, adult gaming centre or pawnbrokers will only be permitted where it can be demonstrated that the proposal:

- a. will not impact adversely on the amenity, character and function of an area;
  - a. will not have a detrimental impact on the vitality of the town centre;
  - b. will not result in negative cumulative impacts due to an unacceptable concentration of such uses in one area, ensuring that:  
Linear concentrations:
- b. None of the specified uses in the policy are adjacent to each other; and
  - i. There are at least two units in other uses between other betting shops, adult gaming centres or pawnbrokers; or  
Area concentrations:
  - ii. There are no more than three (in total) betting shops, adult gaming centres or pawnbrokers within 400m of each other

3.42 Policy DM14 relates specifically to the authority's district and local centres and states:

1. The Council will support proposals that safeguard and enhance the role of the district and local centres defined on the Policies Map.
2. Proposals for shops (Class E(a)), offices (falling under Class E(c)), cafes and restaurants (Class E(b)) and pubs/bars/drinking establishments (sui generis) appropriate to the scale and function of the centre and which would reinforce the centre's role will be supported.
3. The expansion of shopping and other commercial uses into adjoining residential streets by the piecemeal conversion of individual properties will not be permitted. Proposals to extend the shopping frontage of these centres will only be allowed if they involve frontages that are abutting an existing shopping frontage, are in scale with the existing centre and can be achieved without harming residential amenity.
4. Proposals for uses not described in 2. above (including residential and sui generis uses) will only be permitted in exceptional circumstances where they would not undermine the retail function, role and character of the centre. Any proposal that creates an over-concentration of uses not identified in 2. above or has a significant adverse effect on the amenity of existing residents will not be permitted.
5. The impact of any proposal on the retail function of a centre will consider:
  - a) the use proposed and its compatibility with nearby uses;
  - b) the current vitality and viability of the centre;
  - c) the use proposed and whether it would lead to an over concentration of uses not described in 2. above ;
  - d) the site's location and prominence within the centre;
  - e) the level of vacancies within the centre;
  - f) the need to maintain a retail core within the centre;
  - g) the viability of the continued use of the property as a use described in 2. Above
6. Any proposal for a Hot Food Takeaway use (sui generis) must also accord with Policy DM16 'Hot Food Takeaways'.

3.43 Policy DM15 then relates to thresholds for impact assessments and states the following:

**An Impact Assessment is required for retail and leisure proposals including the formation of mezzanine floors; changes of use and variations of condition to remove or amend restrictions which are not located in a defined centre where:**

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

**The scope and content of any Impact assessment shall be agreed with the Local Planning Authority.**

3.44 Policy DM16 provides specific planning guidance in respect of hot food takeaways. The Policy states:

**‘To promote healthier communities, permission will not be granted for hot food takeaways in or within 400 metres of wards where there is more than 15% of the year 6 pupils or 10% of reception pupils with obesity.’**

## Other Documents of Relevance

3.45 The emerging Local Plan in Wyre will take the form of a full review of the Wyre Local Plan (2011-2031), as some additional matters fall outside the scope of the partial update of 2022. An Issues and Options document was subject to public consultation between July 2024 and September 2024.

3.46 Notably, this document was prepared before the General Election of July 2024 and is therefore not reflective of the planning reforms subsequently proposed and adopted by the new Labour Government. As a consequence, the Local Plan timetable has been extended and the weight that can be given to the Issues and Options document is reduced.

3.47 Nonetheless, we note that the Issues and Options consultation document of 2024 proposes no changes to the centre hierarchy set out in Part 1 of adopted Policy EP4, and proposes to consider whether Wyre Borough Council should:

- Continue to prioritise its retail centres for retail uses;
- More actively embrace and promote a wider range of commercial, community and residential activity in its retail centres;
- Continue to protect its traditional retail centres from out-of-centre retail development; and/or
- Do nothing and let the market decide, although it would risk losing retail uses altogether.

3.48 In addition to the above, there are a series of Masterplan documents produced within the Wyre local authority area which provide development frameworks for a range of mixed-use sites, predominantly led by residential development.

3.49 Blackpool Council is preparing a new Local Plan which will replace Parts 1 and 2 of the current Blackpool Local Plan. The plan is at a very early stage, with no consultation documents having been produced at this time.

3.50 In February 2023, Blackpool Council’s Executive Committee approved a Town Centre Action Plan in order to support the delivery of the refreshed Town Centre Strategy prepared by CRBE in 2022. The Action Plan will be implemented over five years and proposes a range of interventions under the following headings:

- Public Realm
  - Streetscape

- Environment
  - Illuminate
- Clustering and Town Centre Usage
  - Connectivity
  - Town Centre Realignment
  - Signage and Wayfinding
- Community
  - Residents and Businesses
  - Wellbeing
  - Social Value
- Events and Meanwhile
  - Events
  - Meanwhile Initiatives
  - Vacant Space
- Culture and Entertainment
  - Storytelling and Entertainment
  - Cultural Initiatives
- Heritage
  - Protection of Assets
  - Heritage Action Zone
- Governance
  - Delivery
  - Partnership
  - Measurement
  - Enforcement

3.51 In addition, Blackpool has a range of adopted Supplementary Planning Documents (SPDs)/Guidance (SPGs) and Advice Notes which provide more detailed guidance on policies contained within the Local Plan.

3.52 Within Wyre, Town Centre Regeneration Frameworks are in place for the centres of Fleetwood, Cleveleys, Garstang and Poulton and are material considerations in the determination of planning applications.

3.53 The Frameworks seek to assess how the centres can build on their offer and wider environmental quality and ensure that they provide for the local residents. Key aspirations within the Regeneration Frameworks are to:

- Ensure centres are inclusive for all and be fully accessible;
- Improve the environmental quality;
- Encourage evening economies;
- Improve the public realms and reduce the impact of traffic;
- Diversify the offer of the centres;
- Be resilient, sustainable and aim to be net carbon zero; and
- Identify sites with opportunities for future change.

## Summary of Policy Overview

3.54 The NPPF of December 2024 (updated in February 2025) supports a plan-led system with policies underpinned by relevant and up-to-date evidence. To promote the vitality and viability of town centres, planning policies should



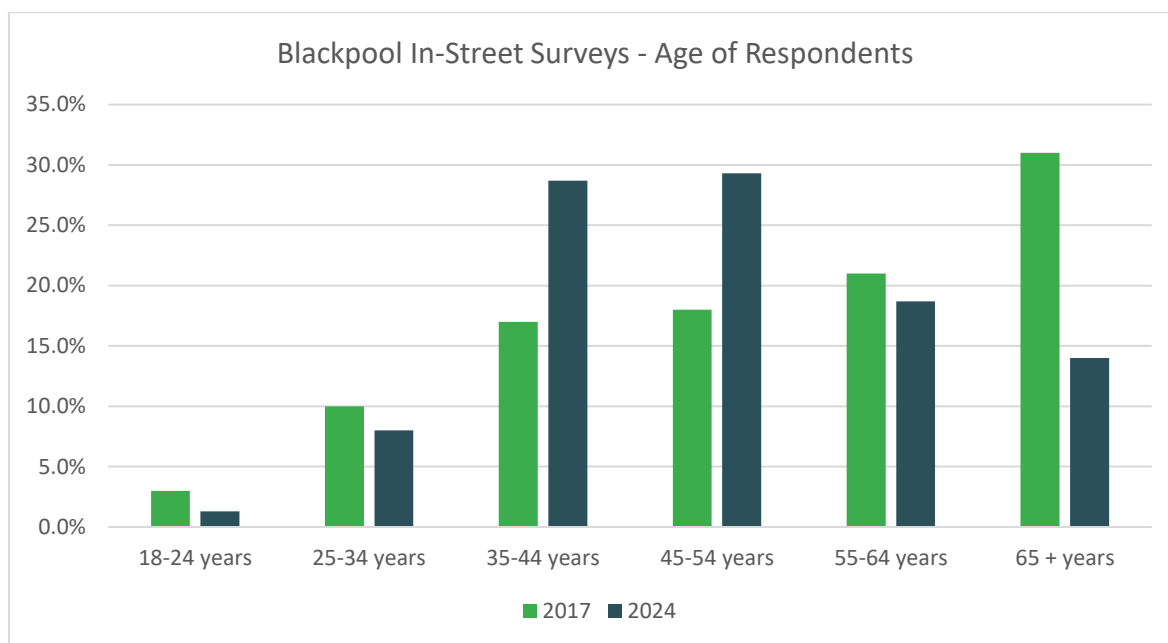
allow them to diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing), and reflects their distinctive characters.

- 3.55 It is evident that the general intention of recent national planning policy is to provide for more flexibility through a less prescriptive approach to land use. Similarly, the changes to the Use Classes Order and the new Class E-to-residential permitted development right introduced in 2020 and 2021, respectively, reflect the Government's objective of supporting the revival of the high street by allowing for greater flexibility in changing uses within town centres without the need for planning permission.
- 3.56 The NPPF also states that a range of sites should be allocated to meet the scale and type of development (including retail, leisure, office and other main town centre uses) likely to be needed, looking at least ten years ahead. Through the sequential and impact tests that apply to policies and proposals for main town centre uses, the NPPF advocates a 'town centre first' approach.
- 3.57 The currently adopted development plan policies for retail and town centres in Wyre and Blackpool are broadly reflective of these national policy requirements and objectives. Both sets of policies define a network and hierarchy of town centres (see Policy EP4(1) in the Wyre Local Plan and Figure 13 in the Blackpool Local Plan Part 1: Core Strategy).
- 3.58 Both development plans promote the long-term vitality and viability of their respective centres through strategies to allow them to grow and diversify. In Wyre, the overarching strategy is set out in Policy EP4 and includes a requirement for development to be appropriate in scale and commensurate with the relevant centre's position and function in the hierarchy. In Blackpool, Policy CS4 of Local Plan Part 1 provides the high-level strategy for the Borough's centres, with Policies CS17 to CS23 identifying specific strategic sites through which the Council seeks to achieve the regeneration of Blackpool town centre and its resort core.
- 3.59 The extent of the town centres and (where relevant) primary shopping areas are defined on the relevant Policies Maps. The authorities have also chosen to define Primary and Secondary Frontages, with policies setting out the preferred approach and uses in these areas (see Policy EP6 in the Wyre Local Plan and Policies DM11 and DM12 in the Blackpool Local Plan Part 2).
- 3.60 Section 9 of the Wyre Local Plan and Policy MUSA1 in the Blackpool Local Plan Part 2 allocate suitable sites for the scale and type of development likely to be needed in their town centres over the plan periods. Blackpool Council, in particular, recognises that residential development can play an important role in ensuring the vitality of centres and encourage residential development on appropriate sites through its Policy DM6 in Local Plan Part 2.
- 3.61 With regard to the application of the sequential and impact tests to proposals for main town centre uses, Policy EP5 of Wyre's Local Plan is generally in conformity with the requirements of the NPPF. The policy sets a local impact threshold of 500 sq.m gross for new retail floorspace and retains the NPPF default threshold of 2,500 sq.m gross for new leisure proposals.
- 3.62 Blackpool's Policy CS14 in Local Plan Part 1 and Policies DM14 and DM15 in Local Plan Part 2 also broadly reflect the NPPF's requirements for the sequential and impact assessments. Policy DM15 introduces locally set impact thresholds for retail and leisure proposals of 500 sq.m gross authority-wide; 300 sq.m gross where the proposal is located within 800m of the boundary of a district centre; and 200 sq.m gross where the proposal is located within the boundary of a local centre.

## 4. Market Research – In Street Surveys (Blackpool Town Centre)

- 4.1 An 'in-street' survey of users of Blackpool town centre was undertaken by NEMS in October 2024 to seek to understand how the town centre is used and identify those aspects of the centre that may benefit from improvement and change.
- 4.2 In total, 150 in-street surveys were completed at five different locations in the town centre, these being:
- i) Junction of Bank Hey Street and Adelaide West
  - ii) Entrance to Houndshell on Victoria Street
  - iii) Junction of Bank Hey Street and Market Street
  - iv) Church Street around M&S and towards the Grand Theatre
  - v) Talbot Rd/Abingdon Street
- 4.3 The tabulated results of the in-street survey are provided as Appendix 4. The surveys were scheduled in order to secure a variety of users: 75 surveys were undertaken on Monday, Tuesday and Thursday; 50 surveys were undertaken on Friday; and 25 surveys were undertaken on Saturday. Of the 150 respondents, 54% were men and 46% were women.
- 4.4 We set out an overview of the key findings of the survey below, focusing on customer satisfaction ratings, customer behaviour, and suggestions for improvement.
- 4.5 To consider how the town centre and users' perceptions of it have changed over time, some of the in-street survey questions are identical to a similar survey of pedestrians carried out in Blackpool town centre in September 2017 as part of WYG's Retail, Leisure and Hotel Study of June 2018.
- 4.6 The results from the 2017 survey are compared with the results from the 2024 Blackpool survey. It is important to note that the 2017 survey was carried out in September during the academic term time, whereas the 2024 survey was undertaken in October and partly overlapped with the half term school holidays. The difference in timing is likely to have had some impact on the demographic make-up of the survey participants, given that those with school-aged children are more likely to visit during the school holidays whereas those without may avoid these dates.
- 4.7 Figure 4.1 overleaf shows the age distribution of the survey respondents in 2017 and in 2024. The bar chart shows that the 2017 group did contain proportionally higher representation of older people (particularly those aged 65+) and younger people (i.e. aged 18-24 years and 25 to 34 years), who are less likely to have school-aged children.
- 4.8 In addition, the sample size for the 2017 survey was 100, whereas the 2024 survey employed a more robust sample size of 150.
- 4.9 These differences must be borne in mind when comparing the survey results across time.

Figure 4.1: Age Distribution of Blackpool In-Street Survey Respondents in 2017 and 2024



## Travel to Blackpool Town Centre

- 4.10 As outlined below in Table 4.1, the modes of travel to Blackpool Town Centre demonstrate trends in transport preferences and changes over time.
- 4.11 The most popular mode of travel in 2024 was walking, accounting for 37.3% of respondents. This reflects Blackpool's pedestrian-friendly nature, with the town centre's layout and distances between key destinations conducive to walking.
- 4.12 Public transport remains a significant mode of travel, with buses being the second most popular choice at 20.0%. Combined with the use of trams (8.7%), this indicates that public transport continues to be well-utilised by visitors and residents alike.
- 4.13 Car usage, while lower compared to walking and buses, still represents a notable proportion of travel, with 12.0% of respondents driving a car or van and 10.0% travelling as passengers. This highlights the role of private vehicles in town centre access, albeit with a lesser reliance compared to other transport modes.
- 4.14 Tram use has increased since 2017, growing from 3.0% to 8.7%, demonstrating the growing popularity and accessibility of this mode of travel. In contrast, bus use has declined from 30.0% in 2017 to 20.0% in 2024, suggesting a potential shift in preferences or changes in service provision.
- 4.15 These findings illustrate the evolving travel habits of visitors to Blackpool town centre, with a continued emphasis on walking and public transport and a growing appreciation for the tram network. However, opportunities remain to enhance sustainable travel modes further, particularly by encouraging cycling, which remains underrepresented.

**Table 4.1: Most Popular Modes of Travel to Blackpool Town Centre**

Date	First	Second	Third	Fourth	Fifth
2024	Walk (37.3%)	Bus (20.0%)	Car / van (as driver) (12.0%)	Car / van (as passenger) (10.0%)	Tram (8.7%)
2017	Walk (34.0%)	Bus, minibus or coach (30.0%)	Car / van (as driver) (20.0%)	Tram (3.0%)	Train (2.0%)

Source: 2024 NEMS In-Street Survey, Question 1; 2017 NEMS In-Street Survey, Question 1.

## Car Parking

- 4.16 Respondents who travelled to Blackpool Town Centre by car were asked where they had parked during their visit. Among those who were not dropped off and could recall their parking location, the results highlight key preferences and trends over time, as outlined in Table 4.2.
- 4.17 In 2024, the most common response was from individuals who were dropped off and did not park, accounting for 45.5% of respondents. This indicates a significant reliance on being driven to the town centre, which may be influenced by convenience or limited parking options.
- 4.18 The second most popular parking location was Houndshell Shopping Centre Car Park, used by 27.3% of respondents. This finding reflects the car park's central location and accessibility as a key destination for visitors.
- 4.19 A smaller proportion of respondents parked on-street but could not specify the exact location (9.1%), while 6.1% indicated they parked at Sainsbury's Car Park or were unsure about the specific car park they used.
- 4.20 Other car parks, such as Lonsdale Road Car Park and Central Surface Level Car Park, were mentioned by 3.0% of respondents, suggesting they cater to a smaller segment of visitors.
- 4.21 When compared to 2017, several shifts can be observed. The proportion of respondents using Houndshell Shopping Centre Car Park has increased, demonstrating its sustained popularity. Conversely, fewer respondents indicated being dropped off in 2017 (14.8%) compared to 2024 (45.5%), suggesting an evolving pattern in how visitors access the town centre.

**Table 4.2: Where Respondents Parked**

Date	First	Second	Third	Fourth	Fifth
2024	(Dropped off – didn't park) (45.5%)	Houndhill Shopping Centre Car Park (27.3%)	(Don't know – On Street) (9.1%)	Sainsbury's Car Park and (Don't know – Car park) (6.1%)	Lonsdale Road Car Park and Central Surface Level Car Park (3.0%)
2017	Houndhill Shopping Centre Car Park And Sainsbury's Car Park (22.2%)	(Don't know – On Street) (18.5%)	(Dropped off – didn't park) (14.8%)	Wilkinsons Car Park (7.4%)	Church Street/Cookson Street Car Park and (Don't know- Car park) and Private work car park and Wilton Parade (3.7%)

Source: 2024 NEMS In-Street Survey, Question 2; 2017 NEMS In-Street Survey, Question 2.

### Difficulties Obtaining Parking

- 4.22 Respondents who indicated they had parked in Blackpool Town Centre were asked whether they experienced any difficulties obtaining parking during their visit.
- 4.23 As shown in Table 4.3, in 2024, 13.3% of respondents reported encountering challenges when trying to find parking, marking a notable change from 2017, where no respondents indicated such difficulties (0.0%).
- 4.24 The majority of respondents in 2024 (86.7%) stated they did not face any issues obtaining parking, suggesting that while challenges exist for some visitors, the overall availability of parking remains satisfactory for most.
- 4.25 The rise in reported difficulties compared to 2017 may reflect increased visitor numbers, changes in parking provision, or heightened awareness of parking constraints. This feedback highlights the importance of monitoring parking demand and ensuring adequate facilities to meet the needs of visitors to Blackpool Town Centre.

**Table 4.3: Difficulties obtaining parking**

Date	Yes	No
2024	13.3%	86.7%
2017	0.0%	100.0%

Source: 2024 NEMS In-Street Survey, Question 3; 2017 NEMS In-Street Survey, Question3.

### Length of Journey to Town Centre

- 4.26 Respondents were asked about the duration of their journey to Blackpool Town Centre. The most frequently cited response in 2024 was 11 to 15 minutes, given by 28.0% of participants, as shown in Table 4.4. This represents an increase from 2017, where 24.0% of respondents reported the same journey time. Similarly, journeys lasting 16 to 20 minutes increased from 6.0% in 2017 to 20.7% in 2024, suggesting a growing number of visitors travelling slightly longer distances to the town centre.

- 4.27 Conversely, the proportion of respondents reporting journeys of 6 to 10 minutes fell from 34.0% in 2017 to 23.3% in 2024, while those travelling for 0 to 5 minutes also decreased from 13.0% to 6.0%. This indicates a possible shift in the town centre's appeal, with fewer extremely local visitors and a broader catchment area drawing in users from slightly further afield.
- 4.28 Longer journey times, such as 31 to 60 minutes and over 60 minutes, also saw changes. The percentage of respondents travelling for 31 to 60 minutes fell from 11.0% in 2017 to 2.0% in 2024, while those reporting journeys of over 60 minutes increased marginally from 5.0% to 6.0%. This demonstrates Blackpool's continued regional appeal, though the decline in medium-length travel may suggest a shift in visitor demographics or preferences.
- 4.29 The mean journey time calculated by NEMS Market Research for respondents in 2024 was approximately 17.9 minutes, which demonstrates the centre's role as a convenient and centralised destination for the majority of its users. For comparison, the mean journey time in 2017 was a similar but slightly shorter 17.7 minutes.

**Table 4.4: Duration of Journey to Blackpool Town Centre**

Date	2024	2017
0-5 minutes	6.0%	13.0%
6-10 minutes	23.3%	34.0%
11-15 minutes	28.0%	24.0%
16-20 minutes	20.7%	6.0%
21-30 minutes	14.0%	7.0%
31-60 minutes	2.0%	11.0%
Over 60 minutes	6.0%	5.0%

Source: 2024 NEMS In-Street Survey, Question 4; 2017 NEMS In-Street Survey, Question 4.

#### Whether Respondents Travelled to Blackpool Directly from Home, Work or Elsewhere

- 4.30 Respondents were asked about the origin of their trip to Blackpool town centre. As shown in Table 4.5, the vast majority of respondents in 2024 reported travelling from home (88.0%), an increase from 78.0% in 2017. This suggests that the town centre continues to serve predominantly local residents, with an emphasis on home-based trips.
- 4.31 The proportion of respondents visiting the town centre while on holiday declined from 20.0% in 2017 to 10.0% in 2024. Although this remains the second most frequently given answer, a decrease may reflect the timing of the two surveys, with the 2024 survey partially overlapping with the October half-term holidays.
- 4.32 The proportion of respondents who reported that they were travelling to Blackpool directly from work also decreased slightly, from 2.0% in 2017 to 1.3% in 2024, indicating that these visits continue to account for a minority of trips to the town centre. Additionally, a small percentage (0.7%) of respondents in 2024 refused to disclose their origin, a category not recorded in 2017.
- 4.33 These findings indicate that the role played by Blackpool town centre has remained fairly consistent since 2017. The centre continues to serve as a key destination for and attract high proportions of local residents, as well as playing a secondary but important function for holidaymakers and workers.

**Table 4.5: Where Respondents Travelled from Directly to Blackpool Town Centre**

Date	First	Second	Third	Fourth	Fifth
2024	Home (88.0%)	On holiday (10.0%)	Work (1.3%)	Refused (0.7%)	-
2017	Home (78.0%)	On holiday (20.0%)	Work (2.0%)	-	-

Source: 2024 NEMS In-Street Survey, Question 5; 2017 NEMS In-Street Survey, Question 5.

### Connection to Blackpool Town Centre

- 4.34** Respondents were then asked about their connection to Blackpool, specifically whether they live, work, or are visiting the area. As presented in Table 4.6, 62.0% of respondents in 2024 reported living in Blackpool, an increase from 57.0% in 2017.
- 4.35** The proportion of respondents who work in Blackpool has increased from 9.0% in 2017 to 26.0% in 2024. This rise highlights a growing workforce presence within the area, potentially driven by employment opportunities in or around the town centre.
- 4.36** Conversely, the percentage of visitors to Blackpool who live outside the Fylde Coast decreased slightly from 23.0% in 2017 to 21.3% in 2024. Similarly, visitors from elsewhere on the Fylde Coast also declined from 18.0% in 2017 to 14.7% in 2024. These reductions may suggest a shift in the composition of town centre users, with a stronger emphasis on local engagement rather than external visitors.
- 4.37** These findings underscore the evolving dynamics of Blackpool Town centre, with a growing local and workforce focus potentially reshaping its role and function.

**Table 4.6: Respondents Connection to Blackpool**

Date	First	Second	Third	Fourth
2024	Live in Blackpool (62.0%)	Work in Blackpool (26.0%)	Visitor to Blackpool (live outside of the Fylde Coast) (21.3%)	Visitor to Blackpool (live elsewhere on the Fylde Coast) (14.7%)
2017	Live in Blackpool (57.0%)	Visitor to Blackpool (live outside of the Fylde Coast) (23.0%)	Visitor to Blackpool (live elsewhere on the Fylde Coast) (18.0%)	Work in Blackpool (9.0%)

Source: 2024 NEMS In-Street Survey, Question 6; 2017 NEMS In-Street Survey, Question 6.

### Purpose(s) and Duration of Visits

#### Main Purpose of Visit

- 4.38** Respondents were asked to identify the principal purpose of their visit to Blackpool town centre. Table 4.7 identifies that the highest proportion of respondents in 2024 indicated that their main reason for visiting the town centre was browsing, identified by 18.0% of respondents. This was followed by food and grocery shopping at Sainsbury's, Talbot Road (12.7%).
- 4.39** Social and leisure activities were the third most popular response at 10.0%, an increase over the 3.0% in 2017 recorded that suggests there has been increased diversification in Blackpool's offer over this period.
- 4.40** Some of the changes between the two surveys, such as the decline in participants citing clothes/shoe shopping (which fell from 16.0% in 2017 to 9.3% in 2024) and visits to banks/building societies/post offices (6.0% in 2017

compared to 3.3% in 2024), likely reflect broader economic trends and the challenges faced by these sectors in recent years.

- 4.41 The fifth most popular answer in 2024 was work, school, or college, which accounted for 8.0%, compared to 11.0% in 2017.

**Table 4.7: Main Reason for Respondents' Visits**

Date	First	Second	Third	Fourth	Fifth
2024	Browsing (18.0%)	Food and grocery shopping at Sainsbury's, Talbot Road (12.7%)	Social/leisure activities (10.0%)	Clothes/shoes shopping (9.3%)	Work/school/college (8.0%)
2017	Browsing (17.0%)	Clothes / shoes shopping (16.0%)	Work / school / college (11.0%)	Sainsbury's, Talbot Road (10.0%)	Bank / building society / Post Office (6.0%)

Source: 2024 NEMS In-Street Survey, Question 8; 2017 NEMS In-Street Survey, Question 9.

### Other Activities on Day of Visit

- 4.42 Respondents were asked what other activities, if any, they would be doing in Blackpool on the day of their visit. Table 4.8 highlights that in 2024, the most common secondary activity identified by respondents was browsing and visiting the promenade (18.8%). This was followed by visits to Central Pier (16.1%), trips to a café, restaurant, or pub (14.1%); engagement in social or leisure activities (11.4%); and visits to stationers or newsagents (10.7%).
- 4.43 Comparatively, in 2017, browsing accounted for a significantly higher proportion of responses (31.0%), while visits to cafés, restaurants, or pubs represented 18.0% of answers. Visits to jewellery or gift shops were the third most popular activity at 14.0%, while clothes/shoes shopping and trips to the bank or building society were jointly identified by 5.0% of respondents. Activities such as visiting a market or a chemist were mentioned by 4.0% of respondents and ranked as the fifth most popular response.
- 4.44 The findings indicate a decline in browsing as a secondary activity, from 31.0% in 2017 to 18.8% in 2024. This decrease may reflect changes in visitor behaviour, including a shift toward more leisure-based activities such as visits to Central Pier and cafés, restaurants, or pubs.
- 4.45 Despite the reduction in browsing, the responses suggest that linked trips remain an integral part of visitors' use of the centre, with activities related to leisure, food and drink, and retail continuing to feature prominently. However, the declining prominence of traditional shopping-related activities – such as visits to jewellery shops, clothes shops, and markets – may indicate an evolving role for Blackpool town centre as a destination that now serves a broader mix of leisure and recreational purposes.



**Table 4.8: Other Activities on Day of Visit**

Date	First	Second	Third	Fourth	Fifth
2024	Browsing and Promenade (18.8%)	Central Pier (16.1%)	Café / restaurant / pub (14.1%)	Social / leisure activities (11.4%)	Stationers / newsagents (10.7%)
2017	Browsing (31.0%)	Café / restaurant / pub (18.0%)	Jewellery / gift shops (14.0%)	Clothes/ shoes shopping and Bank/building society, (5.0%)	Market and chemist (4.0%)

Source: 2024 NEMS In-Street Survey, Question 9; 2017 NEMS In-Street Survey, Question 9.

### All Activities Carried Out During Visit to Blackpool Town Centre

- 4.46 The 2024 survey combined responses to Questions 8 and 9 to determine the proportion of people visiting Blackpool town centre for various purposes. For comparison, results from the 2017 survey have also been aggregated to highlight changes in usage patterns over time.
- 4.47 The findings in Table 4.9 reveal that browsing continues to be the most frequently cited reason for trips to Blackpool town centre. However, the proportion of respondents undertaking this activity declined significantly from 48.0% in 2017 to 36.7% in 2024. This suggests a shift in visitor priorities, with browsing becoming less dominant over time.
- 4.48 Social and leisure activities have emerged as the second most popular reason for visiting in 2024, cited by 21.3% of respondents. This reflects the growing importance of recreational experiences in attracting visitors to Blackpool town centre. Visits to cafés, restaurants, and pubs (food and beverage) remained stable at 20.0% across both surveys, underscoring the enduring role of food and drink as part of the town centre experience.
- 4.49 Other leisure-related activities, including visits to the Promenade and Central Pier, have gained greater prominence since 2017. In 2024, 18.7% of respondents cited visiting the Promenade as a reason for their trip, while 16.0% mentioned Central Pier. These categories did not feature prominently in earlier surveys, highlighting Blackpool's evolving appeal as a leisure destination.
- 4.50 In contrast, some previously significant activities have seen declines. For example, shopping for clothes and shoes, cited by 21.0% of respondents in 2017, has fallen in prominence in 2024. Similarly, visits to jewellery and gift shops (16.0% in 2017) and trips to Sainsbury's on Talbot Road (13.0% in 2017) no longer rank among the top five reasons for visiting in 2024.
- 4.51 The survey findings suggest that Blackpool town centre is shifting its focus from traditional retail activities toward leisure and recreation. The increased emphasis on social and leisure pursuits, as well as attractions like the Promenade and Central Pier, demonstrates Blackpool's ability to adapt to the changing dynamics of town centre usage. This diversification is crucial in responding to the challenges facing traditional retail environments, ensuring the centre remains relevant and appealing to a broad range of visitors.

**Table 4.9: Purpose of Visit**

Date	First	Second	Third	Fourth	Fifth
2024	Browsing (36.7%)	Social / leisure activities (21.3%)	Café / restaurant / pub (food and beverage) (20.0%)	Promenade (18.7%)	Central Pier (16.0%)
2017	Browsing (48.0%)	Clothes / shoes shopping (21.0%)	Café / restaurant / pub (food and beverage) (20.0%)	Jewellery / gift shops (16.0%)	Sainsburys, Talbot road, Blackpool (13.0%)

Source: 2024 NEMS In-Street Survey, Question 9X; 2017 NEMS In-Street Survey, Questions 8 and 9 combined.

### Duration of Visits

- 4.52** Both the 2017 and 2024 surveys asked respondents how long they thought they would stay in Blackpool town centre that day, with the results shown in Table 4.10.
- 4.53** The most common answer across both years was between 1 hour and 30 minutes and 1 hour and 59 minutes, which was said by a similar proportion of respondents in 2024 (29.3%) and in 2017 (30.0%). The next most popular answers, however, showed a higher propensity for longer visits in 2024 compared to 2017.
- 4.54** In 2024, the mean visit time calculated by NEMS was 182.3 minutes, which is almost 45 minutes longer than the mean time calculated in 2017 of 137.7 minutes.
- 4.55** The low proportion of short duration stays in the centre suggests that Blackpool has a high propensity for linked trips, where visitors combine activities such as shopping with the use of, for example, a leisure/cultural facility or service trader.

**Table 4.10: Duration of Respondents' Visits**

Date	First	Second	Third	Fourth	Fifth
2024	1hr 30 mins - 1hr 59 min (29.3%)	Half the day (between 2 and 4 hours) (28.0%)	All day (4 hours or more) (25.3%)	30-59 minutes (7.3%)	1hr -1hr 29 min (6.7%)
2017	1hr 30 mins - 1hr 59 min (30.0%)	Half the day (between 2 and 4 hours) (22.0%)	30-59 minutes and All day (4 hours or more) (16.0%)	1hr -1 hr 29 min (13.0%)	Less than 30 minutes (2.0%)

Source: 2024 NEMS In-Street Survey, Question 10; 2017 NEMS In-Street Survey, Question 10.

### Food Shopping

- 4.56** Respondents were asked if they intended to undertake their main food and grocery shopping while in Blackpool. As shown in Table 4.11, 18.0% of respondents in 2024 indicated that they planned to shop for groceries during their visit, an increase from 12.0% in 2017. This suggests a growing inclination among town centre users to incorporate grocery shopping into their trips, potentially reflecting an improved or more accessible retail offer in the area.
- 4.57** Conversely, the majority of respondents in both years stated that they did not plan to do their grocery shopping in Blackpool, though this proportion has decreased from 87.0% in 2017 to 81.3% in 2024. The slight reduction may indicate a shift toward the town centre as a more versatile destination for a range of activities, including grocery shopping.

- 4.58 The percentage of respondents who were uncertain about their plans has remained relatively stable, with 0.7% in 2024 compared to 1.0% in 2017.

**Table 4.11: Main food and grocery shopping plans while in Blackpool**

	2024	2017
Yes	18.0%	12.0%
No	81.3%	87.0%
Don't know	0.7%	1.0%

Source: 2024 NEMS In-Street Survey, Question 11; 2017 NEMS In-Street Survey, Question 11.

### Frequency of Visits to Blackpool Town Centre for Food Shopping

- 4.59 Respondents were asked how frequently they visit Blackpool for their main food and grocery shopping. The results, presented in Table 4.12, reveal some shifts in shopping habits between 2017 and 2024.
- 4.60 In 2024, no respondents reported visiting Blackpool daily for grocery shopping, compared to 2.0% in 2017. Over the same period, the proportion of respondents visiting 2 to 3 times per week dropped from 9.0% to 4.0%.
- 4.61 However, the percentage of individuals visiting once a week remained consistent at 24.0% in both years, highlighting the sustained importance of weekly shopping trips.
- 4.62 Interestingly, there has been an increase in visits once a month, rising from 2.0% in 2017 to 10.0% in 2024. This suggests that some respondents may have shifted to less frequent but planned shopping trips. Visits once a fortnight also saw a slight increase, from 19.0% in 2017 to 20.7% in 2024.
- 4.63 The proportion of respondents who reported 'never' visiting Blackpool for grocery shopping has risen marginally, from 38.0% in 2017 to 40.0% in 2024.

**Table 4.12: Frequency of visits to Blackpool for main food and grocery shopping**

Frequency	2024	2017
Everyday	0.0%	2.0%
2-3 times a week	4.0%	9.0%
Once a week	24.0%	24.0%
Once a fortnight	20.7%	19.0%
Once a month	10.0%	2.0%
Less than once a month	1.3%	1.0%
First time today	0.0%	0.0%
Never	40.0%	38.0%

Source: 2024 NEMS In-Street Survey, Question 12; 2017 NEMS In-Street Survey, Question 12.

### Frequency of Visits for Non-Food Shopping

- 4.64 Table 4.13 reveals that, in 2024, 46.0% of respondents stated they visited Blackpool town centre for non-food shopping once a fortnight, making it the most frequent response. This figure has more than doubled compared to 20.0% in 2017.

4.65 Visits once a week accounted for 8.7% of answers in 2024, a notable drop from 19.0% in 2017. Similarly, daily visits decreased from 7.0% in 2017 to 2.0% in 2024, and those visiting 2-3 times a week fell sharply from 23.0% to 2.7%.

4.66 The shift suggests less frequent non-food shopping visits, reflecting evolving patterns of consumer behaviour.

**Table 4.13: Frequency of Visit to Town centre for Food Shopping**

Date	Everyday	2-3 times a week	Once a week	Once a fortnight	Once a month	Less than once a month
2024	2.0%	2.7%	8.7%	46.0%	10.0%	14.0%
2017	7.0%	23.0%	19.0%	20.0%	6.0%	9.0%

Source: 2024 NEMS In-Street Survey, Question 13; 2017 NEMS In-Street Survey, Question 13.

## Spending Intentions

### Intended Expenditure

4.67 Respondents were asked how much they had spent or intended to spend in the town centre on non-food shopping. Based on these answers, NEMS calculated a mean expenditure for this category. The results are presented below in Table 4.14.

**Table 4.14: Expenditure or Intended Expenditure on Non-Food Shopping**

Amount (£)	2024	2017
Nothing	12.7%	17.0%
Up to £5.00	2.0%	11.0%
£5.01-£10.00	19.3%	14.0%
£10.01-£15.00	18.0%	5.0%
£15.01-£20.00	12.0%	13.0%
£20.01-£25.00	8.0%	3.0%
£25.01-£50.00	7.3%	10.0%
£50.01-£75.00	5.3%	6.0%
£75.01-£100.00	1.3%	2.0%
More than £100	4.0%	0.0%

Source: 2024 NEMS In-Street Survey, Questions 14; 2017 NEMS In-Street Survey, Questions 14.

4.68 The results from the 2024 survey indicate changes in spending patterns compared to the 2017 survey. In 2024, a lower proportion of respondents (12.7%) stated that they had spent or intended to spend 'nothing' in the town centre compared to 17.0% in 2017, suggesting a slight increase in the proportions of visitors engaging in non-food shopping.

4.69 However, the table highlights that spending patterns have become more polarised in 2024. The proportion of respondents spending £5.01-£10.00 increased significantly, rising from 14.0% in 2017 to 19.3% in 2024. Similarly, those spending between £10.01-£15.00 increased sharply from 5.0% to 18.0%, indicating growth in modest, lower-value purchases.

- 4.70 At the higher end of the spending scale, 4.0% of respondents in 2024 stated that they intended to spend more than £100, compared to none in 2017. This shift suggests that while larger purchases remain less common, a small segment of visitors is willing to spend significantly more on non-food items.
- 4.71 Conversely, fewer respondents in 2024 reported spending up to £5.00 compared to 2017 (a decrease from 11.0% to 2.0%), and those spending £25.01-£50.00 also fell slightly from 10.0% to 7.3%. These findings may reflect tighter spending habits among mid-level consumers, driven by the rising cost of living and broader economic pressures.
- 4.72 Overall, while non-food shopping remains a key activity for visitors to Blackpool town centre, spending habits have shifted toward smaller, lower-value purchases, with a slight increase in higher-end spending. The findings also reflect the ongoing challenges to the retail sector, including the growth of online shopping and changing consumer behaviour in response to economic uncertainty.

## Frequency of Visits

### Evening Time

- 4.73 Respondents were questioned about how often they visit the town centre during the evening. Table 4.15 identifies that Blackpool is used less frequently during the evening compared to the daytime. In this regard, 0.7% of respondents indicated that they visit the town centre in the evening once a week or more frequently, and a total of 8.7% indicated that they visit once a month or more. However, 57.3% of respondents stated that they never visit Blackpool town centre in the evening. Similarly, the percentage of respondents visiting less often in the evening has remained steady, while the proportion of people who never visit the town centre during the evening has remained high but slightly decreased from 58.0% in 2017 to 57.3% in 2024.
- 4.74 There has been a decline in the proportion of people visiting the centre regularly. In 2017, 4.0% of respondents indicated that they visited the town centre once a week or more frequently, compared to just 0.7% in 2024.
- 4.75 There may be further opportunities to encourage those who are infrequent or non-visitors to visit the town centre in the evening by promoting events or activities.

**Table 4.15: Frequency of Respondents' Visits to Blackpool town Centre During the Evening**

Date	Daily	Once a Week or more	Less than once a week	Less than a fortnight	Less than once a month	Never
2024	0.7%	0.7%	1.3%	6.0%	23.3%	57.3%
2017	1.0%	4.0%	2.0%	8.0%	21.0%	58.0%

Source: 2024 NEMS In-Street Survey, Question 15; 2017 NEMS In-Street Survey, Question 15.

## Evening/Night-Time Visits

### Purpose(s) of Evening Visits

- 4.76 The survey asked respondents about their reasons for visiting Blackpool town centre during the evening, with the findings presented in Table 4.16. A similar question was asked in the 2017 survey, allowing for a direct comparison of changes over time. In 2024, the most frequently cited reason for visiting the town centre was to eat in a café (26.6%), which shows a small increase compared to 25.0% of respondents in 2017 who stated that they were visiting to eat in either a café or restaurant.

- 4.77 Visiting the Illuminations was the second most popular reason for visiting in 2024, accounting for 23.4% of responses. This activity did not feature prominently in the earlier survey, although we note that the Illuminations were running in September 2017 when that research was undertaken. This finding indicates Blackpool's renewed significance as an evening attraction in recent years. Eating in a restaurant remained a notable reason for visits in both surveys. However, the proportion fell from 19.4% in 2017 to 15.6% in 2024, suggesting a slight decline in its relative importance as an evening activity.
- 4.78 Attending a concert, gig, or theatre was the fourth most popular response in 2024 at 12.5%, compared to 22.2% in 2017 when it ranked second. This decline may reflect changes in the availability or popularity of live evening events over the intervening years, with the recent rises in the cost of living likely being one of the causes. Visiting a pub was cited by 7.8% of respondents in 2024, slightly down from 8.3% in 2017, when visits to bars and trips for work/school/college achieved the same number of responses.
- 4.79 Overall, the findings highlight that dining continues to play a key role in attracting visitors to Blackpool town centre in the evenings, with cafés experiencing slight growth in popularity.

**Table 4.16: Main Reason for Respondents' Visits to Blackpool town Centre During the Evening**

Date	First	Second	Third	Fourth	Fifth
2024	Eat in a café (26.6%)	Visiting the Illuminations (23.4%)	Eat in a restaurant (15.6%)	Go to a concert / gig / theatre (12.5%)	Visit a pub (7.8%)
2017	Eat in a cafe or restaurant (25.0%)	Go to a concert/gig (22.2%)	Eat in a restaurant (19.4%)	Visit a bar and Visiting a pub and Work / School / College (8.3%)	Go to the cinema (5.6%)

Source: 2024 NEMS In-Street Survey, Question 16; 2017 NEMS In-Street Survey, Question 16.

### Other Activities on Evening of Visit

- 4.80 Respondents were asked what other activities, if any, they tend to do when visiting Blackpool town centre in the evening. Table 4.17 highlights that in 2024, the most common secondary evening activity identified by respondents was visiting the Illuminations (35.9%). This was followed by visits to eat in a restaurant (21.9%), eat in a café (17.2%), go to the cinema (also 17.2%), and go to a concert/gig/theatre (12.5%). The third most popular answer in 2024 was that respondents had no reason or no other reason to visit the town centre in the evenings (20.3%).
- 4.81 In contrast, in 2017, the proportion of participants who answered that they had no reason or no other reason to visit in the evenings was much higher, at 44.4%, and was by far the most popular answer. The next most frequent responses in 2017 were to eat in a restaurant (16.7%), to go to the cinema (13.9%), to visit a pub (also 13.9%), to eat in a café (11.1%) and to visit a bar (8.3%).
- 4.82 These findings suggest that Blackpool's evening economy has gained in strength and popularity in recent years, with a decline in the proportion of people with no reason to visit the town centre in the evening and a corresponding rise in the reported frequency of activities such as visiting the Illuminations and dining out.

**Table 4.17: Other Activities on Evening of Visit**

Date	First	Second	Third	Fourth	Fifth
2024	Visit the illuminations (35.9%)	Eating in a restaurant (21.9%)	No reason / no other reason (20.3%)	Eating in a café and Go to the cinema (17.2%)	Go to a concert / gig / theatre (12.5%)
2017	No reason / no other reason (44.4%)	Eating in a restaurant (16.7%)	Go to the cinema and Visiting a pub (13.9%)	Eating in a café (11.1%)	Visit a bar (8.3%)

Source: 2024 NEMS In-Street Survey, Question 17; 2017 NEMS In-Street Survey, Question 17.

### All Activities Carried Out During Evening Visit to Blackpool Town Centre

- 4.83** The 2024 survey combined responses to Questions 16 and 17 to determine the proportion of people visiting Blackpool town centre in the evenings for various purposes. For comparison, results from the 2017 survey have also been aggregated to highlight changes in usage patterns over time.
- 4.84** The findings in Table 4.18 provide further evidence of the importance of the evening economy in driving visitor footfall. In 2017, the majority of survey participants (64.0%) gave no response when asked the main reason why they visited Blackpool town centre in the evening or what they tended to do while visiting in the evening. In 2024, every single respondent named at least one activity. The most popular answer was visiting the Illuminations, with well over half of people (59.4%) giving this response.
- 4.85** The proportions of people citing food and drink had also risen. In 2017, only 13.0% of people said they would visit the centre in the evenings to eat in a café and a further 13.0% said they would eat in a restaurant. In 2024, 43.8% of respondents identified eating in a café as an activity they would do in Blackpool in the evenings and 37.5% said they would eat in a restaurant. The numbers of people citing going to concerts/gigs/theatres and to the cinema as an evening activity have also grown. In 2017, 9.0% of participants said they would go to a concert or gig in the town centre, compared to 25.0% in 2024. Similarly, 7.0% of respondents in 2017 said they would go to the cinema in Blackpool in the evening, whereas 21.9% of people gave this answer in 2024.

**Table 4.18: Any Mention of Evening Visit Activity**

Date	First	Second	Third	Fourth	Fifth
2024	Visit the Illuminations (59.4%)	Eating in a café (43.8%)	Eating in a restaurant (37.5%)	Go to a concert / gig / theatre (25.0%)	Go to the cinema (21.9%)
2017	No response (64.0%)	Eating in a café and Eating in a restaurant (13.0%)	Go to a concert / gig (9.0%)	Visiting a pub (8.0%)	Go to the cinema (7.0%)

Source: 2024 NEMS In-Street Survey, Question 17X; 2017 NEMS In-Street Survey, Question 17X.



## Duration of Evening Visits

- 4.86 The NEMS survey of 2024 asked respondents about the duration of their trip to Blackpool town centre in the evening, with the results provided in Table 4.19. The same question was asked in 2017 for the WYG Retail, Leisure and Hotel Study.
- 4.87 The results from 2024 show a clear shift in the patterns of visit duration. The most common length of stay was between 1 and 2 hours, with over half of respondents (54.7%) reporting this duration. This marks a significant increase from 22.2% in 2017, suggesting that shorter evening visits have become much more prevalent.
- 4.88 Conversely, the proportion of respondents staying between 2 and 4 hours has decreased notably, falling from 72.2% in 2017 to 34.4% in 2024. Similarly, the percentage of visitors staying over 4 hours has declined sharply, from 5.6% in 2017 to just 1.6% in 2024, indicating a reduction in extended evening visits.
- 4.89 The proportion of respondents visiting for less than an hour remains minimal at 1.6% in 2024, though this represents a slight increase compared to 0.0% in 2017.

**Table 4.19: Duration of Respondents' Visits in the Evening/Night**

Date	Up to 1 hour	Between 1 and 2 hours	Between 2 and 4 hours	Over 4 hours
2024	1.6%	54.7%	34.4%	1.6%
2017	0.0%	22.2%	72.2%	5.6%

Source: 2024 NEMS In-Street Survey, Question 18; 2017 NEMS In-Street Survey, Question 18.

## Comparisons with Surrounding Centres

- 4.90 Both surveys asked a series of questions about how Blackpool town centre compares with other surrounding centres in terms of several aspects. Respondents were asked whether they felt Blackpool performed better, worse, or about the same as the comparator centres. Their answers were then used to generate a mean score in relation to Blackpool's performance in each area. The scoring system is as follows:
- a mean score of 2 means that participants perceived Blackpool to perform 'much better' than surrounding centres;
  - a mean score of 1 indicates that Blackpool was judged to perform 'better';
  - a mean score of 0 denotes that Blackpool's performance was 'about the same';
  - a mean score of -1 suggests that Blackpool's performance was 'worse'; and
  - a mean score of -2 signifies that Blackpool's performance was 'much worse' than that of the surrounding centres.

## Retail, Service and Leisure Offer

- 4.91 In terms of its retail, service and leisure offer, Table 4.20 shows that survey respondents generally felt Blackpool town centre performed 'about the same' or 'better' than other centres in the locality. In 2024, participants judged Blackpool's choice of cultural facilities (including the theatre, tower, ballroom, etc.) and its leisure facilities to be better than those within the comparator centres, with each of these aspects receiving a mean score of 1.11.

**Table 4.20: Comparing Blackpool town centre with other surrounding centres, how does it compare on the following aspects? (Retail, Service and Leisure Offer)**

	Choice of shops		Choice of high street names		Choice of independent/specialist shops		Range of services such as banks and other financial services		Range and choice of pubs / restaurants		Leisure facilities		Choice of Cultural facilities Theatre/Tower Ballroom, etc	
	2024	2017	2024	2017	2024	2017	2024	2017	2024	2017	2024	2017	2024	2017
Much better	1.3%	2.0%	0.7%	2.0%	0.0%	1.0%	0.0%	1.0%	12.7%	14.0%	20.7%	9.0%	19.3%	N/A
Better	22.0%	42.0%	20.7%	28.0%	37.3%	24.0%	7.3%	26.0%	68.7%	48.0%	68.0%	36.0%	70.7%	N/A
About the same	57.3%	32.0%	61.3%	47.0%	36.7%	34.0%	44.7%	41.0%	12.0%	17.0%	6.0%	20.0%	8.7%	N/A
Worse	10.0%	10.0%	6.7%	8.0%	10.0%	10.0%	28.0%	7.0%	2.7%	1.0%	2.0%	0.0%	0.0%	N/A
Much worse	1.3%	0.0%	2.0%	1.0%	2.7%	0.0%	0.7%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	N/A
Don't know	8.0%	14.0%	8.7%	14.0%	13.3%	31.0%	19.3%	24.0%	4.0%	20.0%	3.3%	35.0%	1.3%	N/A
<b>Mean Score</b>	<b>0.13</b>	<b>0.42</b>	<b>0.12</b>	<b>0.26</b>	<b>0.25</b>	<b>0.23</b>	<b>-0.27</b>	<b>0.25</b>	<b>0.95</b>	<b>0.94</b>	<b>1.11</b>	<b>0.83</b>	<b>1.11</b>	<b>N/A</b>

Mean score [Much better = 2, Better = 1, About the same = 0, Worse = -1, Much worse = -2]

Source: 2024 NEMS In-Street Survey, Questions 19A to 19G; 2017 NEMS In-Street Survey, Question 19.

- 4.92 The majority of the remaining indicators also received positive scores in 2024, including Blackpool's range and choice of pubs/restaurants (0.95), choice of independent/specialist shops (0.25), choice of shops (0.13), and choice of high street names (0.12).
- 4.93 The exception is Blackpool's range of services such as banks and other financial services, which received a negative mean score of -0.27 in 2024. This represents a considerable fall since 2017, when respondents judged Blackpool to be performing slightly better than surrounding centres in this regard (the previous mean score was 0.25). 'Bricks and mortar' financial service provision has reduced across the country over this period, as transactions have increasingly moved online. Nonetheless, this finding reflects a relative lack of such services in Blackpool town centre compared to surrounding centres and national averages.
- 4.94 Blackpool's performance in respect of the other aspects set out in Table 6.20 above has remained fairly stable since 2017. There have been slight declines in how respondents rated Blackpool's choice of shops compared to other centres (with the mean score having dropped from 0.42 in 2017 to 0.13 in 2024) and its choice of high street names (which scored 0.26 in 2017 and 0.12 in 2024). In contrast, perceptions of Blackpool's leisure facilities have improved (with the mean score increasing from 0.83 in 2017 to 1.11 in 2024).

### Environmental Quality and Accessibility

- 4.95 In 2024, Blackpool was generally judged by survey participants to be performing better than surrounding centres in terms of its environmental quality and accessibility by public transport and for pedestrians. Table 4.21 shows that Blackpool received positive mean scores in relation to the town centre environment (0.10), cleanliness (0.56), accessibility by bus (0.92), accessibility by train (0.53), and public information/signposts/public facilities (0.56).

- 4.96 Importantly, all of these scores have increased since the equivalent questions were asked in 2017, with the biggest perceived increase relating to cleanliness (the mean score for which rose from -0.10 in 2017 to 0.56 in 2024).
- 4.97 Conversely, the town centre was perceived to be performing worse than comparator centres with regard to accessibility by car. Respondents judged Blackpool relatively negatively in terms of its car parking provision (with the mean score being -0.16) and its car parking prices (-0.67).
- 4.98 Both of these scores represent a decline from those recorded in 2017 (from 0.21 and -0.20 respectively).

**Table 4.21: Comparing Blackpool town centre with other surrounding centres, how does it compare on the following aspects? (Environmental Quality and Accessibility)**

	Town Centre environment		Cleanliness		Car parking provision		Car parking prices		Accessibility by bus		Accessibility by train		Public information/ signposts / public facilities	
	2024	2017	2024	2017	2024	2017	2024	2017	2024	2017	2024	2017	2024	2017
Much better	2.0%	2.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	2.0%	3.3%	0.0%	0.0%	5.0%
Better	18.7%	12.0%	62.0%	16.0%	8.7%	14.0%	2.0%	2.0%	60.0%	35.0%	28.7%	14.0%	56.0%	33.0%
About the same	65.3%	54.0%	29.3%	46.0%	16.7%	23.0%	10.0%	24.0%	7.3%	29.0%	30.7%	53.0%	42.0%	38.0%
Worse	12.7%	20.0%	4.7%	23.0%	15.3%	5.0%	28.0%	9.0%	0.7%	3.0%	1.3%	3.0%	0.7%	1.0%
Much worse	0.0%	0.0%	2.0%	1.0%	0.0%	0.0%	0.7%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	1.0%
Don't know	1.3%	12.0%	0.7%	14.0%	59.3%	58.0%	59.3%	65.0%	29.3%	30.0%	36.0%	30.0%	1.3%	22.0%
<b>Mean Score</b>	<b>0.10</b>	<b>-0.05</b>	<b>0.56</b>	<b>-0.10</b>	<b>-0.16</b>	<b>0.21</b>	<b>-0.67</b>	<b>-0.20</b>	<b>0.92</b>	<b>0.49</b>	<b>0.53</b>	<b>0.16</b>	<b>0.56</b>	<b>0.51</b>

Mean score [Much better = 2, Better = 1, About the same = 0, Worse = -1, Much worse = -2]

Source: 2024 NEMS In-Street Survey, Questions 20A to 20G; 2017 NEMS In-Street Survey, Question 20.

### Visitor Provision and Perceptions of Safety

- 4.99 Blackpool scored relatively well against the majority of the criteria listed in Table 4.22. Respondents in 2024 judged the town centre to be performing better than nearby centres in relation to tourist facilities/hotels (mean score of 1.19), entertainment/events/performances (0.97), daytime safety (0.60), public art (0.42), and layout (0.36). With the exception of entertainment/events/performances, the mean score for which has slightly declined, these figures all represent improvements on those achieved in 2017.
- 4.100 On the other hand, survey participants judged evening/night safety in Blackpool to be worse than in neighbouring centres. This aspect was given a mean score of -0.97 in 2024, which is lower than the -0.88 achieved in 2017.

**Table 4.22: Comparing Blackpool town centre with other surrounding centres, how does it compare on the following aspects? (Visitor Provision and Perceptions of Safety)**

	Entertainment/ events/performances		Tourist facilities/ hotels		Day time safety		Evening/ night safety		Layout		Public Art	
	2024	2017	2024	2017	2024	2017	2024	2017	2024	2017	2024	2017
Much better	8.7%	24.0%	23.3%	20.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	3.0%
Better	78.7%	47.0%	65.3%	48.0%	60.0%	10.0%	1.3%	3.0%	39.3%	26.0%	40.0%	22.0%
About the same	7.3%	9.0%	4.0%	11.0%	34.0%	72.0%	10.7%	19.0%	56.0%	55.0%	56.0%	31.0%

Worse	2.0%	1.0%	0.7%	0.0%	3.3%	6.0%	44.7%	29.0%	4.0%	2.0%	1.3%	3.0%
Much worse	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	11.3%	17.0%	0.0%	0.0%	0.0%	2.0%
Don't know	3.3%	19.0%	6.7%	21.0%	1.3%	12.0%	32.0%	32.0%	0.7%	17.0%	1.3%	39.0%
Mean Score	0.97	1.16	1.19	1.11	0.60	0.05	-0.97	-0.88	0.36	0.29	0.42	0.34

Mean score [Much better = 2, Better = 1, About the same = 0, Worse = -1, Much worse = -2]

Source: 2024 NEMS In-Street Survey, Questions 21A to 21F; 2017 NEMS In-Street Survey, Question 21.

## Likes, Dislikes and Suggested Improvements to Blackpool Town Centre

### Why Do You Choose to Shop in/Visit Blackpool?

4.101 Table 4.23 highlights reasons that survey respondents chose to visit Blackpool town centre, comparing key factors influencing their visits in 2024 and 2017. Respondents were allowed to give multiple reasons for their choice of Blackpool as a shopping/visitor destination, so the totals do not sum to 100%.

4.102 In 2024, accessibility to Blackpool was the most common reason given for visiting Blackpool and said by over four in ten respondents (40.7%). The next most popular answers were accessibility by public transport (given by 38.0% of participants), close to home (35.3%), habit (25.3%), and safety during the day (21.3%).

4.103 In contrast, the 2017 survey results indicated that being close to home was the primary reason for liking Blackpool Town Centre, as cited by 60.0% of respondents. Accessibility to Blackpool was mentioned by 35.0%, while accessibility by public transport was a factor for 20.0%. Entertainment and events attracted 18.0% of respondents, and proximity to friends and family was noted by 16.0% of respondents.

4.104 These findings illustrate a shift in the reasons for visiting Blackpool Town Centre. By 2024, accessibility and public transport had become more significant factors compared to 2017, while the importance of proximity to home had decreased. Safety during the day, a new factor in 2024, also emerged as an important consideration for visitors.

**Table 4.23: Likes about Blackpool Town Centre**

Date	First	Second	Third	Fourth	Fifth
2024	Accessibility to Blackpool (40.7%)	Accessibility by public transport (38.0%)	Close to home (35.3%)	Habit (25.3%)	Safety (during the day) (21.3%)
2017	Close to home (60.0%)	Accessibility to Blackpool (35.0%)	Accessibility by public transport (20.0%)	Entertainment / events (18.0%)	Close to friends / family (16.0%)

Source: 2024 NEMS In-Street Survey, Question 7; 2017 NEMS In-Street Survey, Question 7.

### Weaknesses of Blackpool Town Centre

4.105 The 2024 survey asked respondents to highlight what they thought were the biggest weaknesses of Blackpool town centre, again allowing multiple answers so totals do not sum to 100%. As shown in Table 4.24, the most frequently mentioned issue was empty shops, cited by 61.3% of respondents—more than double the 29.0% recorded in 2017. Anti-social behaviour ranked second in 2024 (37.3%), slightly higher than in 2017 (36.0%). Accessibility by private car was highlighted as a concern by 17.3% in 2024, whereas it did not appear as a top issue in 2017.

4.106 Interestingly, the 2024 survey showed a decline in the proportion of respondents indicating 'none mentioned' as a response, dropping to 12.7% from 25.0% in 2017. Accessibility by cycling and on foot emerged as a notable

concern in 2024, with 12.0% identifying it, while this was not a key issue in 2017. Conversely, the choice and range of non-food shops, which was a significant concern in 2017 (18.0%), did not appear in the top five issues in 2024. Similarly, the lack of public amenities, highlighted by 13.0% in 2017, was not as prominent in the 2024 findings.

- 4.107 These changes reflect evolving perceptions, with the problem of empty shops and accessibility emerging as key priorities for improvement in Blackpool town centre.

**Table 4.24: Weaknesses of Blackpool Town Centre**

Date	First	Second	Third	Fourth	Fifth
2024	Empty shops (61.3%)	Anti-social behaviour (37.3%)	Accessibility by private car (17.3%)	None mentioned (12.7%)	Accessibility by cycling and on foot (12.0%)
2017	Anti-social behaviour (36.0%)	Empty shops (29.0%)	None mentioned (25.0%)	Choice/range of non-food shops (18.0%)	Lack of public amenities (13.0%)

Source: 2024 NEMS In-Street Survey, Question 25; 2017 NEMS In-Street Survey, Question 25.

### Suggested Improvements to Blackpool Town Centre

- 4.108 The 2024 survey revealed significant changes compared to 2017 regarding the measures respondents felt would improve Blackpool and make it more attractive, as shown in Table 4.25.
- 4.109 In 2024, filling empty shops remained the top priority, rising sharply from 34.0% in 2017 to 70.7%. Reducing low-quality shops became a higher concern, growing from 20.0% to 54.0%. Security and CCTV improvements also increased in importance from 20.0% to 51.3%. While a general facelift saw a rise from 28.0% to 42.7%, improved public toilet provision, highlighted by 40.0% in the 2024 survey, was not a top suggestion in 2017.

**Table 4.25: Most Popular Suggestions to Improve Blackpool Town Centre**

Date	First	Second	Third	Fourth	Fifth
2024	Fill the empty shops (70.7%)	Fewer low-quality shops (take-away, pound shops, vape shops) (54.0%)	Improved security / CCTV (51.3%)	General facelift (flowers, painting, etc.) (42.7%)	Improved public toilet provision (40.0%)
2017	Fill the empty shops (34.0%)	General facelift (flowers, painting, etc.) (28.0%)	Improved security / CCTV and Fewer low-quality shops (take-away, pound shops) and Improve the quality of the shops (20.0%)	Improved cleanliness (18.0%)	Cheaper parking (15.0%)

Source: 2024 NEMS In-Street Survey, Question 24; 2017 NEMS In-Street Survey, Question 24.

### Desired Changes to Specific Elements of Blackpool Town Centre's Offer

- 4.110 The next two questions in the 2024 in-street survey concerned specific elements of Blackpool town centre's offer.

## Shops and Services

- 4.111 Participants were asked types of shops or services they would like to see more of in Blackpool, with Table 4.26 showing their answers compared to the results from the 2017 survey.
- 4.112 In 2024, 29.3% of respondents expressed a desire for more banks in Blackpool town centre, significantly up from 7.0% in 2017. Clothing stores (21.3%) and high street names (16.0%) were the third and fourth most common responses respectively, showing increases compared to 15.0% and 10.0%, respectively, in 2017. Interest in independent/specialist shops remained consistent at 13.3% (compared to 13.0% in 2017).
- 4.113 Notably, fewer respondents in 2024 mentioned footwear stores (12.7%) than in 2017 (19.0%), reflecting a shift in preferences. The proportion of respondents stating "none mentioned" dropped from 39.0% in 2017 to 22.0% in 2024.

**Table 4.26: Desired Changes in Terms of Shops and Service Facilities**

Date	First	Second	Third	Fourth	Fifth
2024	Banks (29.3%)	None mentioned (22.0%)	Clothing stores (21.3%)	High Street names (16.0%)	Indoor market stalls (14.7%)
2017	None mentioned (39.0%)	Footwear stores (19.0%)	Clothing stores And Department stores / retailers (15.0%)	Independent / specialist shops (13.0%)	Electrical goods (11.0%)

Source: 2024 NEMS In-Street Survey, Question 22; 2017 NEMS In-Street Survey, Question 22.

## Leisure and Cultural Facilities

- 4.114 Turning to leisure facilities, respondents were asked what types of leisure facilities they would like to see more of in the town centre. As Table 4.27 identifies, in 2024, the responses were more varied, with the highest proportion of respondents (28.7%) wanting more museums, followed by parks/gardens (25.3%) and art galleries (24.7%). Other notable preferences included civic halls/civic spaces (19.3%), swimming pools (13.3%), and children's activity centres (10.7%).
- 4.115 Interestingly, 37.3% of respondents stated that they did not wish to see any additional leisure facilities, indicating a relatively strong existing offer.
- 4.116 Comparing these figures to 2017, there has been a significant increase in the desire for museums (from 8.0% to 28.7%), parks/gardens (from 8.0% to 25.3%), and art galleries (from 7.0% to 24.7%). The interest in swimming pools also rose slightly from 10.0% to 13.3%. However, the proportion of respondents who did not mention any specific preference decreased from 64.0% in 2017 to 37.3% in 2024, suggesting a clearer demand for specific leisure facilities.

**Table 4.27: Desired Changes in Terms of Leisure Facilities**

Date	First	Second	Third	Fourth	Fifth
2024	None mentioned (37.3%)	Museums (28.7%)	Parks / gardens (25.3%)	Art galleries (24.7%)	Civic Hall / Civic spaces (19.3%)
2017	None mentioned (64.0%)	Swimming pool (10.0%)	Entertainment / activities for young people (9.0%)	Museums and Parks / gardens (8.0%)	Art galleries (7.0%)

Source: 2024 NEMS In-Street Survey, Question 23; 2017 NEMS In-Street Survey, Question 23.

## Abingdon Street Market

- 4.117** Blackpool was previously home to two markets; Abingdon Street and Bonny Street Markets which offered different functions at different locations in Blackpool town centre. However, Bonny Street Market closed permanently in November 2022.
- 4.118** Abingdon Street Market, which previously had more of a retail focus, has undergone an extensive refurbishment since the 2017 survey. The market hall reopened in May 2023 as (primarily) a food and beverage destination comprising a foodhall, coffee shop, cocktail bar and craft beer bar, with supporting retail and community space.
- 4.119** The 2024 respondents were asked a series of questions relating to Abingdon Street Market, including how often they visit it, and what they like and dislike about it. While similar questions were asked in 2017, given the major differences in the offer and function of the market pre- and post-redevelopment, we do not consider that comparison of these results would be meaningful. As such, the 2017 results are not discussed further here.

## Intentions to Visit Abingdon Street Market

- 4.120** Thus, in 2024, the in-street survey participants were asked if they intended to visit Abingdon Street Market that day. Table 4.28 below shows that 12.7% of respondents answered in the affirmative, whereas 84.7% answered that they did not intend to visit the market.

**Table 4.28: Do You Intend to Visit Abingdon Street Market Today?**

Date	Yes	No	Don't Know / Haven't Decided Yet
2024	12.7%	84.7%	2.7%

Source: 2024 NEMS In-Street Survey, Question 26

## Frequency of Visits to Abingdon Street Market

- 4.121** When asked about the frequency of their visits to Abingdon Street Market, Table 4.29 confirms that 1.3% of respondents indicated that they visit once a week or more frequently, while 3.3% visit less than once a week. A total of 12.0% of respondents visit the market less than once a fortnight, and 24.0% visit less than once a month.
- 4.122** Thus, in total, 40.7% of respondents reported that they do visit the market.
- 4.123** Conversely, 54.7% of respondents stated that they never visit Abingdon Street Market (with the remaining 4.7% of answers falling into the 'don't know/varies' category).



**Table 4.29: Frequency of Respondents' Visits to Abingdon Street Market**

Date	Daily	Once a Week or more	Less than once a week	Less than once a fortnight	Less than once a month	Never
2024	0.0%	1.3%	3.3%	12.0%	24.0%	54.7%

Source: 2024 NEMS In-Street Survey, Question 27

### What Respondents Most Liked About Abingdon Street Market

- 4.124 When asked what one thing they particularly liked about Abingdon Street Market, Table 4.30 shows that the most common answer among 2024 respondents was nothing (45.3%). The second most popular answer was that the market is all on one level, which was identified by 26.0%, followed by don't know (16.0%), easy to get to (3.3%) and friendly atmosphere (2.7%).

**Table 4.30: What Respondents Particularly Liked About Abingdon Street Market**

Date	First	Second	Third	Fourth	Fifth
2024	Nothing (45.3%)	All on one level (26.0%)	Don't know (16.0%)	Easy to get to (3.3%)	Friendly atmosphere (2.7%)

Source: 2024 NEMS In-Street Survey, Question 28

### Other Things Respondents Liked About Abingdon Street Market

- 4.125 Survey participants were then asked to identify anything else they particularly liked about Abingdon Street Market. They were allowed to give multiple responses to this question, so the answers shown in Table 4.31 don't total 100.0%.
- 4.126 Almost three quarters of respondents in 2024 (74.1%) praised Abingdon Street Market's friendly atmosphere. In addition, the respondents overwhelmingly identified good service as a positive feature of Abingdon Street Market, with 69.0% of them giving this answer.
- 4.127 The responses also emphasised that the Market is easy to get to and highlighted the range and quality of the food sold.

**Table 4.31: Other Things Respondents Liked About Abingdon Street Market**

Date	First	Second	Third	Fourth	Fifth
2024	Friendly atmosphere (74.1%)	Good service (69.0%)	Easy to get to (36.2%)	Range of food (22.4%)	Quality of food (20.7%)

Source: 2024 NEMS In-Street Survey, Question 29

### All Likes About Abingdon Street Market

- 4.128 Table 4.32 combines the answers from the previous questions and presents all of the features that survey respondents particularly liked about Abingdon Street Market, highlighting the key factors influencing their visits.
- 4.129 The most frequently cited reason for liking Abingdon Street Market was the friendly atmosphere, mentioned by 81.0% of respondents. This was followed by the fact that the market was all on one level, noted by 77.6% of respondents. Good service was important to 72.4% of participants, while ease of access was highlighted by 44.8%. The freshness of food was a factor for 24.1% of respondents.

**Table 4.32: All Things Respondents Liked About Abingdon Street Market**

Date	First	Second	Third	Fourth	Fifth
2024	Friendly atmosphere (81.0%)	All on one level (77.6%)	Good service (72.4%)	Easy to get to (44.8%)	Freshness of food (24.1%)

Source: 2024 NEMS In-Street Survey, Question 29X

### What Respondents Most Disliked About Abingdon Street Market

- 4.130 When asked what one thing they particularly disliked about Abingdon Street Market, 49.3% of respondents answered, 'don't know', indicating a level of uncertainty or neutrality regarding negative aspects of the market.
- 4.131 Encouragingly, 22.0% of respondents reported that there was nothing they disliked about the market.
- 4.132 Among the minority who did express concerns, 6.7% highlighted the issue of empty stalls or stalls closing down. Other perceived issues included poor value for money, cited by 6.0% of respondents, and the perception that the market is not big enough, mentioned by 5.3%.

**Table 4.33: Dislikes about Abingdon Street Market**

Date	First	Second	Third	Fourth	Fifth
2024	(Don't know) (49.3%)	Nothing (22.0%)	Empty stalls / stalls closing down (6.7%)	Poor value for money (6.0%)	Not big enough (5.3%)

Source: 2024 NEMS In-Street Survey, Question 30

### Other Things Respondents Disliked About Abingdon Street Market

- 4.133 As shown in Table 4.34, when participants were asked what else they particularly disliked about Abingdon Street Market, the most commonly reported concern was poor value for money, cited by 39.5% of respondents. The second most frequent complaint was the lack of stalls, identified by 32.6% of those surveyed.
- 4.134 The third most frequent answer, said by 18.6% of respondents, was 'nothing'.
- 4.135 Additional issues that were highlighted during the survey included the market not being big enough and the inability to pay by credit card, both mentioned by 11.6% of respondents. Furthermore, 7.0% of respondents expressed dissatisfaction with the poor quality of non-food items.

**Table 4.34: Other things respondents dislike about Abingdon Street Market**

Date	First	Second	Third	Fourth	Fifth
2024	Poor value for money (39.5%)	Not enough stalls (32.6%)	Nothing (18.6%)	Not big enough And Inability to pay by credit card (11.6%)	Poor quality of non-food items (7.0%)

Source: 2024 NEMS In-Street Survey, Question 31

## All Dislikes About Abingdon Street Market

- 4.136 The survey combined responses from Questions 30 and 31 in the 2024 survey to present a comprehensive view of what respondents disliked about Abingdon Street Market. As respondents could select multiple factors, the results do not sum to 100%.
- 4.137 Table 4.35 shows that the most frequently cited dislike was poor value for money, reported by 60.5% of respondents. The second most common concern was the lack of stalls, mentioned by 48.8%.
- 4.138 Additionally, 30.2% of respondents felt the market was not big enough, and 27.9% expressed concern over empty stalls or stalls closing down. Furthermore, 23.3% of respondents highlighted the inability to pay by credit card.

**Table 4.35: Least Liked Aspects of Abingdon Street Market**

Date	First	Second	Third	Fourth	Fifth
2024	Poor value for money (60.5%)	Not enough stalls (48.8%)	Not big enough (30.2%)	Empty stalls / stalls closing down (27.9%)	Inability to pay by credit card (23.3%)

Source: 2024 NEMS In-Street Survey, Question 31X

## Summary

- 4.139 The in-street survey has gleaned a large amount of information relating to respondents' views, which can be fully understood through a review of the full results provided at Appendix 4. With regard to the purpose of this Study – which is to consider users' needs and identify locations to accommodate new main town centre uses – the following trends since 2017 are of particular relevance:

- **Travel to Blackpool Town Centre**
  - While the most popular modes of travel remain broadly similar, there have been increases in the numbers of visitors who travel to the town centre on foot, by tram, and as car passengers in 2024 compared to in 2017.
  - Houndshell Shopping Centre car park remains the most popular parking location in the town centre, with the proportion of visitors using this facility increasing between 2017 and 2024. The biggest recorded increase over this period, however, is in the number of respondents who reported that they were dropped off and didn't park.
  - In 2017, zero survey participants reported difficulties obtaining parking; whereas in 2024, 13.3% of respondents answered that they had difficulty finding a space.
  - The data on the duration of journeys to Blackpool suggest that the town centre continues to serve as a convenient and centralised destination for the majority of users, as well as attracting some footfall from further afield. The mean journey time calculated in 2017 was 17.70 minutes, while in 2024 the mean time was similar but slightly longer at 17.92 minutes.
  - More respondents reported travelling directly from home to Blackpool in 2024 compared to in 2017, again highlighting the growing scale and importance of the town centre's residential catchment.
  - Similarly, when asked about their connection to Blackpool town centre and whether they lived in, worked in, or were visiting the area (from either elsewhere or outside the Fylde Coast), there were substantial rises in the numbers of respondents saying they lived and worked in Blackpool in 2024 compared to 2017.

- **Purpose(s) and Duration of Visits**

- 'Browsing' remains the most common reason for users to visit Blackpool town centre, but the role of the centre is evolving as a result of the diversification in its offer. Between 2017 and 2024, there was a growth in the proportion of respondents citing food shopping and leisure activities as the main reason for their visit, and a corresponding decline in the proportion citing non-food shopping.
- Similarly, there was an increase between 2017 and 2024 in the proportion of survey participants who indicated that they intended to undertake their main food and grocery shop in the town centre.
- While there was a slight increase between 2017 and 2024 in the proportion of respondents reporting that they planned to shop for food and groceries in Blackpool, the overall frequency of visits for food shopping remains relatively stable, albeit there appears to be a growing trend towards less frequent but planned convenience shopping trips.
- With regard to non-food shopping, there has generally been a shift to less frequent visits in 2024 compared to 2017, which reflects the changes in the comparison market sector highlighted in Section 2 of this report.
- Respondents reported that they expected their visits to Blackpool to last, on average, almost 45 minutes longer in 2024 compared to 2017. The low proportion of short duration stays in the centre suggests that Blackpool has a high propensity for linked trips, where visitors combine activities such as shopping with the use of, for example, a leisure facility. (NB: This finding may reflect the increased number of respondents reporting that they live and work in Blackpool, as noted above.)

- **Spending Intentions**

- Spending patterns in Blackpool town centre have become more polarised in 2024 compared to 2017, with more respondents reporting that they intended to make smaller, lower-value purchases but also with a slight increase in higher-end spending.

- **Evening/Night-Time Visits**

- The survey findings indicate that Blackpool town centre continues to benefit from a strong evening economy, with the proportions of survey participants indicating that they visit the centre in the evening for food and drink and events, particularly the Illuminations (which were running at the time of both surveys), increasing in 2024 compared to 2017.
- The survey findings suggest that Blackpool's evening economy gained in strength and popularity between 2017 and 2024, with a decline in the proportion of people with no reason to visit the town centre in the evening and a corresponding rise in the reported frequency of activities such as visiting the Illuminations and dining out.
- The Illuminations especially have grown in importance as a footfall draw since 2017, with over half of the 2024 respondents (59.4%) saying that they would go to Blackpool in the evenings to see them. Other activities that have driven a significant rise in the number of people visiting the town centre in the evenings include dining in cafés and restaurants, attending concerts/gigs/theatre performances, and going to the cinema.
- The average duration of respondents' evening/night-time visits to the town centre has decreased since 2017. There are a number of potential reasons for this finding, including the growing focus in Blackpool's leisure offer on restaurants and family-oriented entertainment venues (such as the Backlot Cinema & Diner which opened in the Houndshell Shopping Centre in March 2024), rather than pubs and nightclubs.

- **Comparisons with Surrounding Centres**

- In terms of its retail, service and leisure offer, survey respondents generally felt Blackpool town centre performed 'about the same' or 'better' than other centres in the locality. There have been slight declines since 2017 in how respondents rated Blackpool's choice of shops compared to other centres and its choice of high street names. In contrast, perceptions of Blackpool's leisure facilities have improved.
- There has been a considerable fall since 2017 in how participants rated Blackpool's range of facilities of banks and other financial services. 'Bricks and mortar' financial service provision has reduced across the country over this period, as transactions have increasingly moved online. Nonetheless, this finding reflects a relative lack of such services in Blackpool town centre compared to surrounding centres and national averages.
- Blackpool was generally judged by survey participants to be performing better than surrounding centres in terms of its environmental quality and accessibility by public transport and for pedestrians. Importantly, all of the ratings relating to the town centre environment, cleanliness, accessibility by bus, accessibility by train, and public information/signposts/public facilities had increased since the equivalent questions were asked in 2017.
- Conversely, the town centre was perceived to be performing worse than comparator centres with regard to accessibility by car, with the ratings for car parking provision and car parking prices being negative and having declined since 2017.
- In general, Blackpool scored well compared to nearby centres in relation to tourist facilities/hotels, entertainment/events/performances, daytime safety, public art, and layout. With the exception of entertainment/events/performances, the mean score for which has slightly declined, the ratings for these indicators in 2024 all represented improvements on those achieved in 2017.
- On the other hand, survey participants judged evening/night safety in Blackpool to be worse than in neighbouring centres. This aspect was given a negative mean score which was lower than that achieved in 2017.

- **Likes, Dislikes and Suggested Improvements to Blackpool Town Centre**

- When asked why they chose to visit Blackpool, the most popular answers given by the 2024 survey respondents related to the town centre's accessibility, including by public transport. Accessibility and public transport had become more significant factors compared to 2017, while the importance of proximity to home had decreased. Safety during the day was also a much more important consideration for visitors in 2024 compared to 2017.
- With regard to what survey participants thought were the biggest weaknesses of Blackpool town centre, a much greater proportion cited empty shops as a concern in 2024 (when this was the most popular answer) than in 2017. Accessibility by car was also highlighted as a concern in 2024, whereas this issue did not feature prominently in 2017. Anti-social behaviour was identified as a problem in both surveys and at similar rates.
- In terms of the measures respondents felt would improve Blackpool and make it more attractive, filling empty shops was the top priority in both 2017 and 2024, but the proportion of respondents giving this answer had more than doubled over this period. Similarly, survey participants across both years expressed a desire for fewer low-quality shops (e.g. takeaways, pound shops and vape shops), improved security/CCTV, and a general facelift (flowers, painting, etc.) for the town centre, but the number of people who gave these answers in 2024 had risen sharply since 2017.

- **Desired Changes to Specific Elements of Blackpool Town Centre's Offer**

- When asked what types of shops and services they would like to see more of in Blackpool, the most popular answer in 2024 was banks; whereas this was not one of the top five answers in 2017. The proportions of respondents who expressed a desire for more clothing stores and high street names had also increased since 2017.
- In 2017, the majority of survey participants did not mention a type of leisure facility of which they would like to see more. By 2024, 'none mentioned' was still the most popular answer to this question, suggesting a relatively strong existing offer, but there had been an increase over this period in the proportions of respondents expressing a desire for museums, parks/gardens, art galleries, and swimming pools.

- **Abingdon Street Market**

- Blackpool's market offer has changed considerably since the 2017 survey, with the closure of Bonny Street Market in November 2022, and with the major refurbishment of Abingdon Street Market completed in May 2023 creating a more food and drink focussed destination with supporting retail and community space.
- A notable proportion of respondents in 2024 (12.7%) indicated that they intended to visit Abingdon Street Market on the day of the survey. Additionally, over four in ten (40.7%) reported visiting the market, with a reasonably high propensity for repeat visits.
- The most commonly mentioned positive aspects of Abingdon Street Market were its friendly atmosphere (identified by 81.0% of those asked this question), the fact that it is all on one level (77.6%), and the good service (72.4%). Respondents also highlighted that the market was easy to get to (44.8%) and the freshness of the food sold (24.1%) as key factors contributing to their positive perceptions of the market.
- With regard to what they disliked about the market, respondents cited poor value for money (60.5%), a lack of stalls (48.8%), and a perception that the stalls were not big enough (30.2%). Other concerns included empty or closing stalls (27.9%) and the inability to pay by credit card (23.3%).

## 5. Market Research – Household Surveys

### Market Share Analysis: Household Survey Results

- 5.1 The NEMS household survey identifies where residents travel to undertake a range of shopping and leisure activities. The summary of results provided in this section focuses on the market share of shopping trips secured by retail venues for various types of shopping. In September 2024, a survey of 1,150 households was undertaken by NEMS within the defined Study Area to ascertain where residents go to undertake a range of shopping and leisure activities.
- 5.2 In reviewing the Study Area, it is important to recognise that the vast majority of convenience goods expenditure generated within a given area is generally claimed by local foodstores. This is because shoppers look to source convenience goods close to home. Comparison goods shopping is more likely to result in longer trips to source goods at higher order destinations. As such, it is to be expected that a substantial proportion of comparison goods shopping trips 'leak' outside of the Study Area to shopping venues offering greater choice to that which is available to them within the authority areas. This may be due to other destinations including higher-order retailers, or larger-format operators providing a wider range of goods.
- 5.3 The household survey is reproduced as part of Appendix 2 of this Study. In retail terms, the principal purpose of the survey is to establish:
- patterns of convenience goods spending, based on the location of:
    - the shops or shops respondents last visited and visited 'the time before last' to undertake their main food shop; and
    - the shop or shops respondents last visited and visited 'the time before last' to undertake their main top-up food shop.
  - patterns of comparison goods spending, based on the location of the respondent's last shopping trip to purchase the following types of comparison goods:
    - clothing and footwear;
    - books, CDs, DVDs and stationery;
    - small household goods, such as home furnishings, clocks, jewellery, glass and china;
    - toys, games, bicycles and recreational goods;
    - chemist goods, including health and beauty items;
    - electrical goods, such as televisions, washing machines and computers;
    - DIY and gardening goods; and
    - furniture, carpets and floor coverings.
- 5.4 The analysis which follows considers market share for the above sub-sectors. Our assessment is based on the market share of expenditure to particular 'bricks and mortar' retail destinations. For comparison goods, the zonal market share secured by each retail destination for each of the above eight sub-sectors is taken directly from the corresponding household survey question responses.

### Non-Store Retailing or Special Forms of Trading

- 5.5 Special forms of trading (SFT) are defined by Experian as sales via the internet, mail order, stalls and markets, vending machines, door-to-door and telephone sales, including online sales by supermarkets, department stores and catalogue companies.



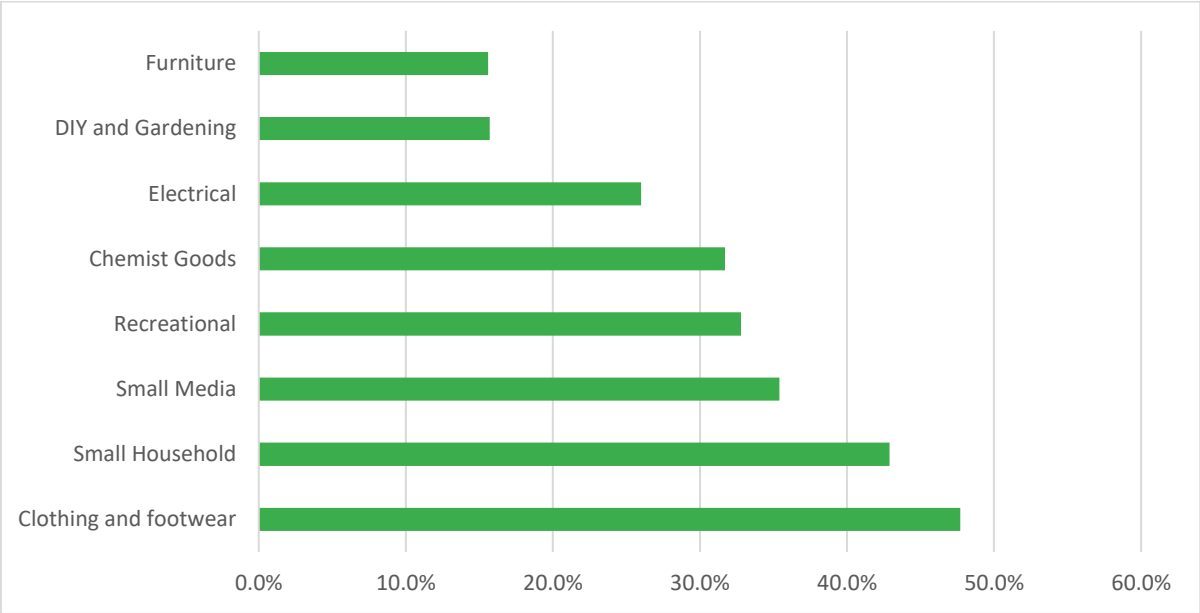
Convenience Goods Online Shopping

- 5.6 The household survey asked residents of the Study Area where they normally undertake their main food and grocery shopping.
- 5.7 Across the Study Area, 11.7% of respondents usually shop online for their main food shop (Question 1 of the Household Survey). As set out in Section 3, the UK average for online convenience shopping in 2024 is 17.3%. As such, the take-up of online convenience shopping in the Study Area is considerably below that of the UK average. This is likely to be indicative of both ease of access to local foodstores and the make-up of the local catchment within which residents prefer to shop in store, rather than online.

Comparison Goods Online Shopping

- 5.8 The household survey asked where respondents usually shop for different types of comparison goods. The findings are presented in the figure below which shows that the take-up for online shopping varies across the categories, from 15.6% (furniture goods) to 47.7% (clothing and footwear). On average, within the Study Area, 31.0% of respondents shop online for comparison goods, which is broadly consistent with the UK average of 32.5%.

Figure 5.1: Study Area Online Spending



Source: NEMS Household Survey

Retail Goods Market Share Analysis

Convenience Goods Market Share

- 5.9 Our analysis begins by reviewing the retention of convenience goods expenditure within each of the eleven Study Area zones (i.e. the proportion of expenditure originating within a given zone which is claimed by retailers located within that same zone). This enables an understanding of whether residents are having to travel to meet their convenience goods shopping requirements, or if they are typically able to meet their needs in proximity to where they live. It is accepted that some respondents will live towards the boundary of their respective zones and some trips will therefore be able to be undertaken to nearby zones in a sustainable manner. As such, although there are instances where zonal retention rates of zones are lower, this does not automatically mean that shoppers are having to travel considerable distances to meet their needs.

- 5.10 In the majority of cases, the top-up shopping retention rates are higher than the main food shopping retention rates, indicating that residents will typically choose convenience destinations closer to home to meet their day-to-day shopping needs such as purchasing a pint of milk or a loaf of bread.

**Table 5.1: Zonal Convenience Goods Retention Rates Across the Study Area at 2024**

Zone	Main Food Shopping Zonal Retention Rate 2024 (%)	Top-Up Food Shopping Zonal Retention Rate 2024 (%)	Combined Convenience Goods Shopping Zonal Retention Rate 2024 (%)	Combined Convenience Goods Shopping Zonal Retention Rate 2010 (%)
1 – Blackpool town centre (north)	30.6%	39.0%	32.7%	27.4%
2 – Blackpool town centre (south)	19.5%	44.6%	25.8%	14.9%
3 – Layton and Whitegate Drive	20.1%	41.8%	25.5%	20.0%
4 – Blackpool Retail Park and Highfield Rd	64.6%	62.7%	64.1%	67.6%
5 – Clifton Retail Park	65.2%	68.7%	66.1%	57.3%
6 – Bispham and Red Bank Road	40.8%	72.7%	48.8%	50.3%
7 – Thornton Cleveleys	69.9%	74.7%	71.1%	67.3%
8 – Poulton-le-Fylde	40.4%	78.0%	49.8%	39.8%
9 – Fleetwood	81.1%	97.1%	85.1%	83.8%
10 – Knott End-on-Sea	5.4%	77.8%	23.5%	27.2%
11 – Garstang	81.4%	88.4%	83.2%	73.6%

Source: Table 4 of Appendix 5 of this Study

- 5.11 Table 5.1 demonstrates that the highest main food shopping retention is found within Zones 4, 5, 7, 9 and 11, from which over 60% of the residents' main food convenience expenditure is being spent at convenience destinations in the same zone.
- 5.12 Within Blackpool, the highest retention rates can be seen in Zones 4 and 5, which both include the large out of centre facilities at Blackpool and Clifton Retail Parks respectively. The lowest retention rates are within Zones 2 and 3 and 19.5% and 20.1% respectively. Within Wyre, the highest main food retention rates are within Zones 9 and 11, and the lowest are within Zones 8 and 10. Within Zone 9, the geography of the northern part of the Wyre authority area means that shoppers are generally encouraged to shop at the convenience destinations within the area, as accessing other stores easily would be difficult.
- 5.13 Over the past 14 years, there has been a slight shift in the combined convenience goods zonal retention rates across all zones, with a more pronounced change noticeable in Zones 2, 8 and 11 where the retention rates have increased by approximately 10% in each case. Looking at Zone 2 in the first instance, the principal change for Zone 2 residents will be the growth of the popularity of the Lidl store at Bloomfield Road, which has ensured that a higher proportion of convenience expenditure has remained within the zone. For Zone 8 residents, the introduction of the Aldi store on Tithebarn Street in Poulton has attracted more of the residents' expenditure and therefore increased the zonal retention rate. A similar outcome can be seen for Zone 11 residents, where the Aldi store on Moss Lane has subsequently opened and now attracts a high proportion of main and top-up expenditure from Zone 11 residents.
- 5.14 Turning to top-up convenience shopping, the overall retention rates are higher within each zone (except Zone 4), which demonstrates the propensity of residents to shop locally to undertake their day-to-day 'basket' shops.
- 5.15 In terms of the zones which broadly cover the Blackpool authority area (Zones 1-6), the highest retention level is found in Zone 6 at 72.7%, with the lowest in Zone 1 at 39.0%. The market share for top-up shopping in each zone is

generally spread out across a higher number of destinations, including the smaller operators such as the Co-op stores, the Sainsbury's Locals and the Tesco Express'.

- 5.16 In terms of the Wyre zones, the top-up shopping retention levels are higher, ranging from 74.7% in Zone 7 (Thornton) to 97.1% in Zone 9 (Fleetwood).
- 5.17 Overall, we find that the broad zonal retention rates identified appear to appropriately reflect the geography of current provision. There may well be scope to improve local retention rates particularly within the central zones of Blackpool (Zones 1, 2 and 3) subject to provision coming forward in appropriate locations in the future.
- 5.18 It is also useful to establish which foodstores residents in each of the eleven zones are choosing to meet their main food shopping requirements, and if there are any trends in terms of whether residents choose to travel further to shop at specific stores.
- 5.19 Table 5.2 below provides the top three main food shopping destinations for residents in each of the eleven zones.

**Table 5.2: Principal Main Food Shopping Destinations for Residents**

Zone	Principal Destinations for Residents	Main Food Market Share
1 – Blackpool town centre (north)	Aldi, Holyoake Avenue, Blackpool (Zone 6) Sainsbury's, Talbot Gateway (Zone 1) Aldi, Blackpool Retail Park (Zone 4)	19.6% 11.9% 10.3%
2 – Blackpool town centre (south)	Lidl, Bloomfield Road (Zone 2) Tesco Extra, Clifton Retail Park (Zone 5) Sainsbury's, Talbot Gateway (Zone 1)	15.3% 14.3% 13.2%
3 – Layton and Whitegate Drive	Tesco Extra, Clifton Retail Park (Zone 5) Asda, Cherry Tree Road (Zone 5) Lidl, Devonshire Road (Zone 3)	19.0% 18.6% 16.3%
4 – Blackpool Retail Park and Highfield Rd	Morrisons, Squires Gate Lane (Zone 4) Aldi, Blackpool Retail Park (Zone 4) Lidl, Squires Gate Lane (Zone 4)	30.3% 20.2% 8.5%
5 – Clifton Retail Park	Asda, Cherry Tree Road (Zone 5) Tesco Extra, Clifton Retail Park (Zone 5) Aldi, Blackpool Retail Park (Zone 4)	30.9% 27.2% 8.5%
6 – Bispham and Red Bank Road	Sainsburys, Red Bank Road (Zone 6) Aldi, Holyoake Avenue (Zone 6) Aldi, Crescent West, Cleveleys (Zone 7)	22.5% 17.7% 10.5%
7 – Thornton Cleveleys	Morrisons, Amounderness Way (Zone 7) Aldi, Crescent West, Cleveleys (Zone 7) Lidl, Anchorholme Lane West, Cleveleys (Zone 7)	30.7% 16.9% 12.9%
8 – Poulton-le-Fylde	Morrisons, Amounderness Way, Thornton (Zone 7) Aldi, Tithebarn Street, Poulton (Zone 8) Booths, Teanlowe Centre (Zone 8)	33.0% 17.3% 13.7%
9 – Fleetwood	Asda, Cop Lane, Fleetwood (Zone 9) Aldi, Poulton Road, Fleetwood (Zone 9) Morrisons, Amounderness Way, Thornton (Zone 7)	38.3% 36.1% 4.8%
10 – Knott End-on-Sea	Aldi, Tithebarn Street, Poulton (Zone 8) Morrisons, Amounderness Way, Thornton (Zone 7) Aldi, Moss Lane, Garstang (Zone 11)	22.7% 11.8% 9.8%
11 – Garstang	Aldi, Moss Lane, Garstang (Zone 11) Sainsbury's, Park Hill Road, Garstang (Zone 11) Booths, Park Hill Road, Garstang (Zone 11)	35.9% 26.3% 17.3%

- 5.20 Focusing on the zones which principally cover the Blackpool authority area in the first instance, we provide our analysis on a zonal basis below.

## Blackpool

### Zone 1 Main Food Shopping Trips

- 5.21 For **Zone 1** residents, 30.6% of their main food shopping trips are being directed towards stores within Zone 1 (and within the town centre), with 11.9% at the Sainsbury's store on Talbot Road, a further 5.7% and 5.5% are at the Co-op at Warley Road and the Heron Foods on Talbot Road respectively.
- 5.22 Looking outside of Zone 1, residents are also looking to the Aldi stores to meet their main food shopping requirements, specifically the Aldi on Holyoake Avenue (19.6%) and the Aldi at Blackpool Retail Park (10.3%). Although the main food retention rates are not a cause for concern, there is a clear indication through the shopping patterns and trips attracted to the Aldi store at Holyoake Avenue in particular, that residents in Zone 1 are choosing specific operators (i.e. Aldi) to meet their needs, and that the responding provision in Zone 1 does not always meet this same need.

### Zone 2 Main Food Shopping Trips

- 5.23 For **Zone 2** residents, the main food shopping trips are principally distributed to the Sainsbury's on Talbot Road in Zone 1 (13.2%), the Lidl at Bloomfield Road in Zone 2 (15.3%), followed by the Aldi, Asda and Tesco stores in Zone 5 (11.0%, 12.6% and 14.3% respectively).
- 5.24 The zonal retention rate for Zone 2 residents is lower than that identified for Zone 1, with the Lidl being the dominant store. Zone 2 residents are also choosing destinations – principally in Zone 5 – to meet their main food shopping needs. Although these are not located within Zone 2, these stores are for the most part within a reasonable travel distance. The anomaly to this is the Tesco at Clifton Retail Park, which is considered to be some distance from Zone 2. However, there is likely to be some degree of trade attracted to the store associated with 'pass-by' trips given its location on a strategic route travelling into Blackpool town centre.

### Zone 3 Main Food Shopping Trips

- 5.25 Turning to **Zone 3** residents, 16.3% of the main food shopping trips are being directed to the Lidl on Devonshire Road (in Zone 3), followed by the Asda at Cherry Tree Road and the Tesco Extra at Clifton Retail Park, both located in Zone 5 at 18.6% and 19.0% respectively.
- 5.26 Although the main food retention levels in Zone 3 are not considered to be high (at 20.1% overall), the stores within Zone 5 which attract relatively high levels of main food shopping trips and expenditure are considered to be accessible for residents in Zone 3, particularly for those to the south of the zone.

### Zone 4 Main Food Shopping Trips

- 5.27 For **Zone 4** residents, the principal main food shopping destinations are the Aldi and Morrisons at Blackpool Retail Park (both located within Zone 4), which attract 20.2% and 30.3% of main food shopping trips respectively. The main food zonal retention rates are therefore considered to be good, with good overall provision of larger foodstores located within the zone. It is worth noting that although very much serving the needs of Blackpool's residents, both the Morrisons and Lidl stores on Squires Gate Lane are located within Fylde's administrative area.

### Zone 5 Main Food Shopping Trips

- 5.28 In terms of **Zone 5** residents, the Asda at Cherry Tree Road and the Tesco Extra at Clifton Retail Park are the principal destinations, attracting 30.9% and 27.2% of main food trips respectively. Overall, the provision of main food shopping destinations located within Zone 5 is considered to be good, with some of the larger foodstores within Blackpool located in the zone.
- 5.29 To a lesser extent, residents are also choosing destinations in Zone 4 to meet their main food shopping needs, including the Aldi at Blackpool Retail Park and the Morrisons at Squires Gate Lane.

### Zone 6 Main Food Shopping Trips

- 5.30 Finally, turning to **Zone 6** residents, the principal destinations for main food shopping are the Aldi store at Holyoake Avenue and the Sainsbury's store at Red Bank Road, both also located in Zone 6 and attracting 17.7% and 22.5% of main food trips respectively. In addition, 10.5% of main food trips from Zone 6 residents are being directed towards the Aldi in Thornton-Cleveleys, located just over the boundary of Zone 7 but close to residents in Blackpool.

### Wyre

- 5.31 Within Wyre, the highest main food shopping retention rates can be seen in Zones 9 and 11, which cover Fleetwood and Garstang respectively.
- 5.32 Looking at the shopping patterns within Wyre's Zones, we provide a summary below of the key main food shopping trips for Zones 7 to 11 residents.

### Zone 7 Main Food Shopping Trips

- 5.33 For **Zone 7** residents, which covers Thornton-Cleveleys, the principal main food destinations are the Aldi at Crescent West (16.9%), the Lidl at Anchorsholme Lane West (12.9%) and the Morrisons at Amounderness Way (30.7%), all also located in Zone 7. Residents have very good access to a range of convenience destinations within Zone 7 in particular.

### Zone 8 Main Food Shopping Trips

- 5.34 The Morrisons store at Amounderness Way in Thornton (Zone 7) is also the principal main food destination for **Zone 8** residents, attracting 33.0% of main food trips. In addition, the Aldi, Booths and the Lidl all in Poulton (located in Zone 8) are key main food destinations for Zone 8 residents, attracting 17.3%, 13.7% and 7.7% of main food shopping trips respectively.

### Zone 9 Main Food Shopping Trips

- 5.35 Looking at **Zone 9** main food shopping trips, the convenience destinations within Fleetwood are the most popular, with the Aldi on Poulton Road attracting 36.1% of trips and the Asda on Cop Lane attracting 38.3% of main food trips.
- 5.36 Due to the geography of this part of the authority area, it is not unsurprising that convenience shopping trips are retained within the area, and that the destinations are drawing a very high proportion of trips from these residents.

### Zone 10 Main Food Shopping Trips

- 5.37 Residents in **Zone 10** are choosing a wider range of convenience destinations to meet their main food shopping needs due to the rural nature of the area. In this regard, the Aldi in Poulton is the most popular destination, attracting 22.7% (Zone 8) of main food shopping trips. In addition, the Morrisons in Thornton attracts 11.8% of trips (Zone 7), the Aldi in Garstang attracts 9.8% of trips (Zone 11), followed by the Lidl in Poulton which attracts 8.1% of trips (Zone 8).
- 5.38 Although the convenience provision within the Zone itself is sparse, again this is not a cause for concern due to the rural nature of the zone. As such, there is a requirement for residents to travel greater distances to meet their convenience shopping needs, or alternatively, these needs may be met through online shopping.

### Zone 11 Main Food Shopping Trips

- 5.39 Within Zone 11, the residents are principally choosing the Aldi in Garstang (35.9%), followed by the Sainsbury's (26.3%) and the Booths (17.3%), all also located within Zone 11. The overarching offer within the zone itself is considered to be good and provides a range of convenience shopping destinations for residents.

### Convenience Goods Market Share Retention

- 5.40 The below Table 5.3 provides a different assessment of shopping patterns, this time setting out the proportion of zonal convenience goods expenditure which is claimed by operators located within the Blackpool and Wyre authority areas.
- 5.41 Table 5.3 identifies that the highest proportion of expenditure attracted to destinations within Blackpool authority area for both main and top-up convenience shopping trips occurs within Zones 2 and 5 but the market share within Zones 1 to 5 attracted to Blackpool authority area destinations is also considered to be high. As set out above, the general convenience offer within the authority area is considered to be good, which is indicated particularly through the good retention levels of expenditure within the zones.
- 5.42 The level in Zone 6 is slightly less, but this is not unexpected in light of the proximity of the zone to destinations within Wyre and there therefore being a degree of 'pull' to these destinations from Blackpool residents.
- 5.43 In terms of Zones 7 to 11, the proportion of shopping trips and convenience expenditure attracted to destinations within the authority area is high, with good retention rates within each zone. The main food and top-up food shopping trips spent at Wyre authority destinations in Zone 9 is the highest.

**Table 5.3: Convenience Goods Market Share by Zone at 2024**

Zone	Main Food Shopping Blackpool Market Share 2024 (%)	Top-Up Food Shopping Trips Blackpool Market Share 2024 (%)	Combined Convenience Goods Blackpool Market Share 2024 (%)	Main Food Shopping Wyre Market Share 2024 (%)	Top-Up Food Shopping Trips Wyre Market Share 2024 (%)	Combined Convenience Goods Wyre Market Share 2024 (%)
1	90.3%	81.2%	88.0%	4.9%	16.0%	7.6%
2	89.9%	93.6%	90.9%	3.8%	2.9%	3.5%
3	85.4%	84.8%	85.2%	10.2%	8.8%	9.9%
4	51.6%	68.2%	55.7%	2.3%	3.1%	2.5%
5	84.1%	88.6%	85.3%	0.0%	3.4%	0.8%
6	67.1%	76.9%	69.6%	32.5%	18.5%	29.0%
7	10.8%	4.6%	9.3%	86.2%	91.7%	87.5%
8	6.8%	1.2%	5.4%	91.2%	97.2%	92.7%
9	0.8%	0.4%	0.7%	95.3%	99.6%	96.4%
10	13.4%	0.9%	10.3%	79.1%	97.1%	83.6%
11	4.4%	1.0%	3.6%	82.9%	90.6%	84.8%
<b>Total</b>	<b>41.6%</b>	<b>41.8%</b>	<b>41.6%</b>	<b>49.0%</b>	<b>51.3%</b>	<b>49.5%</b>

Source: Table 4 of Appendix 5 of this Study for 2024 market shares;

- 5.44 In terms of the comparison with the previous studies, we set out below how the combined convenience goods market share of the Blackpool Borough facilities has altered since the previous calculations in 2017 and then from 2010.
- 5.45 The proportion of convenience expenditure being spent at destinations within Blackpool borough has on the whole, increased since 2010. For Zones 1, 2 and 3 residents, the proportion of expenditure being spent at Blackpool's destinations has increased from 2010 to 2017, and then again from 2017 to 2024. This is likely due to the introduction of new stores in the authority area, including the Aldi at Holyoake Avenue, which is particularly an important destination for residents in Zone 1.
- 5.46 Although the total proportion of expenditure being spent at Blackpool's destinations from Zone 4 residents has decreased since 2017, there has still been an overarching increased witnessed since the 2010 Study. Fluctuations of shopping patterns are not unexpected and the figures presented to not give any cause for concern. This is particularly the case for Zone 4 residents, who are also choosing destinations within the Fylde authority area to meet their convenience needs (principally the Morrisons and Lidl stores on Squires Gate Lane).

**Table 5.4: Blackpool Borough Market Share of Expenditure at 2024, 2017 and 2010**

Zone	Combined Convenience Goods Blackpool Market Share 2024 (%)	Combined Convenience Goods Blackpool Market Share 2017 (%)	Combined Convenience Goods Blackpool Market Share 2010 (%)
1 – Blackpool town centre (north)	88.0%	88.5%	75.8%
2 – Blackpool town centre (south)	90.9%	90.8%	81.4%
3 – Layton and Whitegate Drive	85.2%	83.9%	81.8%
4 – Blackpool Retail Park and Highfield Rd	55.7%	60.2%	50.0%
5 – Clifton Retail Park	85.3%	90.5%	87.4%
6 – Bispham and Red Bank Road	69.6%	65.0%	75.3%

- 5.47 We provide a similar analysis below of the Wyre authority area retention across Zones 7 to 11, using the data from 2024 and that which was presented in 2010. Table 5.5 indicates that the combined convenience goods market share retained by Wyre facilities has increased in Zones 7, 8 and 11 and there are nominal decreases in Zones 9 and 10. Overall, Table 5.5 indicates that the Wyre authority area convenience goods market share is very good for Zones 7 to 11, drawing a good proportion of convenience goods expenditure from Wyre residents.

**Table 5.5: Wyre Authority Area Market Share of Expenditure at 2024 and 2010**

Zone	Combined Convenience Goods Wyre Market Share 2024 (%)	Combined Convenience Goods Wyre Market Share 2010 (%)
7 – Thornton Cleveleys	87.5%	83.8%
8 – Poulton-le-Fylde	92.7%	84.5%
9 – Fleetwood	96.4%	97.0%
10 – Knott End-on-Sea	83.6%	83.8%
11 – Garstang	84.8%	76.9%

### Comparison Goods Market Share

- 5.48 The below Table 5.6 identifies comparison goods shopping patterns, relating to the proportion of zonal comparison goods expenditure which is claimed by operators located within the two authority areas.
- 5.49 In practice, Blackpool’s operators claim more than eight out of every ten pounds originating within Zones 1 to 5 within which between 80.6% (Zone 4) to 91.3% (Zone 2) of comparison expenditure is spent at Blackpool’s facilities. Of those zones which cover the Blackpool authority area, the lowest proportion of expenditure spent at Blackpool’s destinations is recorded in Zone 6 at 64.6%. For Zone 6 residents, residents are also choosing destinations within Zone 7 and within Wyre’s authority area to meet their comparison needs, and principally Cleveleys town centre.
- 5.50 In terms of the zones which cover the Wyre authority area, the comparison goods market share for Wyre facilities is a lot lower, with more than five out of every ten pounds in Zones 7, 9 and 10 and less than five in Zones 8 and 11. Importantly however, Blackpool comparison destinations play important roles in meeting residents’ comparison shopping needs particularly in Zones 7, 8, 9 and 10 where more than three in every ten pounds is spent at Blackpool destinations and just under one in every ten pounds in Zone 10.



**Table 5.6: Comparison Goods Market Share by Zone at 2024**

Zone	Comparison Goods Blackpool Market Share 2024 (%)	Comparison Goods Wyre Market Share 2024 (%)
1 – Blackpool town centre (north)	82.4%	4.2%
2 – Blackpool town centre (south)	91.3%	3.6%
3 – Layton and Whitegate Drive	85.0%	8.1%
4 – Blackpool Retail Park and Highfield Rd	80.6%	4.8%
5 – Clifton Retail Park	87.3%	3.4%
6 – Bispham and Red Bank Road	64.6%	25.8%
7 – Thornton Cleveleys	31.2%	56.6%
8 – Poulton-le-Fylde	43.6%	48.1%
9 – Fleetwood	32.9%	63.6%
10 – Knott End-on-Sea	31.4%	51.8%
11 – Garstang	9.1%	40.0%
<b>Total</b>	<b>55.2</b>	<b>31.2%</b>

Source: Table 4 of Appendix 5 of this Study for 2024 market shares.

- 5.51 The identified market shares are generally encouraging and are reflective of the fact that a good number of day-to-day comparison goods can be sourced close to home.
- 5.52 Looking again at the market shares established in the 2017 Blackpool Study, we can compare the comparison market share figures for Blackpool Borough facilities specifically. We set these out below.

**Table 5.7: Blackpool Borough Market Share of Expenditure at 2024, 2017 and 2010**

Zone	Combined Comparison Goods Blackpool Market Share 2024 (%)	Combined Comparison Goods Blackpool Market Share 2017 (%)	Combined Comparison Goods Blackpool Market Share 2010 (%)
1 – Blackpool town centre (north)	82.4%	85.0%	73.2%
2 – Blackpool town centre (south)	91.3%	89.7%	85.9%
3 – Layton and Whitegate Drive	85.0%	83.5%	79.8%
4 – Blackpool Retail Park and Highfield Rd	80.6%	75.0%	83.4%
5 – Clifton Retail Park	87.3%	81.8%	80.5%
6 – Bispham and Red Bank Road	64.6%	65.7%	72.5%

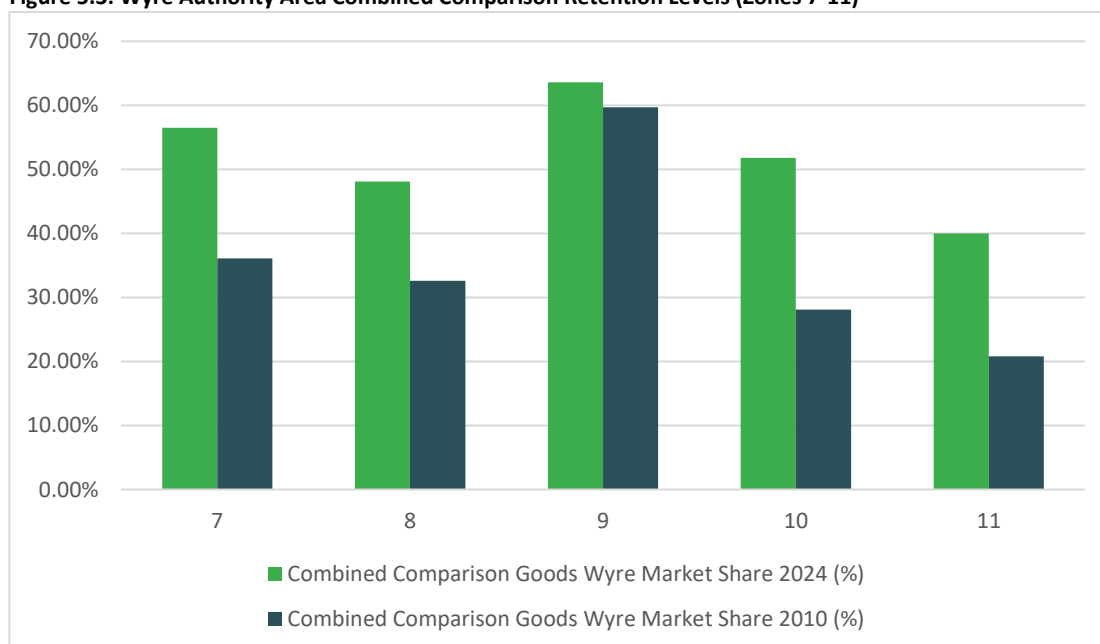
- 5.53 We can see from Table 5.7 above that across the six zones, the comparison market share has remained broadly consistent, with slight improvements seen in Zones 2, 3, 4 and 5 and more considerable improvement of 5.6 percentage points in Zone 4 since 2017. The general improvement and relatively high retention rate of comparison goods expenditure within Zones 1 to 5 indicates that the provision in the borough is good and in the most part, meeting residents’.
- 5.54 Figure 5.2 below provides the same detail, providing a good basis from which a comparison can be made of the borough’s retention levels on a zonal basis, from 2010 up to 2024.

**Figure 5.2: Blackpool Borough Combined Comparison Retention Levels (Zones 1-6)**



5.55 Using the data from Table 5.6 above, Figure 5.3 below provides the same chart for Wyre Comparison facilities on a zonal basis, looking at 2010 and 2024. Overall, we can see an increase in the proportion of comparison expenditure spent at Wyre facilities from residents in Zones 7 to 11 since 2010, which is a good indicator that residents' needs are being met in a relatively sustainable manner. In addition, as shown in Table 5.6 above, Blackpool's destinations also go some way to meeting Wyre borough's needs, ensuring that residents are not necessarily choosing to travel outside of the wider sub-region to meet their comparison needs.

**Figure 5.3: Wyre Authority Area Combined Comparison Retention Levels (Zones 7-11)**



## Clothing and Footwear

5.56 In reviewing the comparison shopping patterns within the Study Area, the analysis focuses on the eight separate categories of goods which fall within the 'non-bulky' and 'bulky' comparison goods sectors.

5.57 However, given the dominance of the clothing and footwear market and the level of expenditure which is spent on such goods (approximately 24.5% of residents' expenditure), we focus firstly on the clothing and footwear patterns, followed by a summary of the other seven categories below. Clothing and footwear retailing has traditionally been the bedrock of town centres' retail offer and it can therefore be a useful barometer of the popularity of high streets. Comparison goods purchases are generally made less often than convenience purchases, and residents are often willing to travel greater distances to meet their comparison shopping needs. As such, levels of zonal retention are often lower than those which are established by convenience goods.

5.58 Table 5.8 below provides the proportions of clothing and footwear shopping patterns to key destinations within the authority areas.

**Table 5.8: Clothing and Footwear Patterns on a Zonal Basis – Principal Destinations**

Zone	Destination	Zone 1 2024 (%)	Zone 2 2024 (%)	Zone 3 2024 (%)	Zone 4 2024 (%)	Zone 5 2024 (%)	Zone 6 2024 (%)	Zone 7 2024 (%)	Zone 8 2024 (%)	Zone 9 2024 (%)	Zone 10 2024 (%)	Zone 11 2024 (%)	Total 2024 (%)
1	Blackpool town centre	72.3%	52.8%	36.6%	28.1%	39.8%	41.0%	19.0%	25.0%	26.5%	20.4%	1.7%	30.6%
4	Blackpool Retail Park	0.0%	3.8%	6.9%	14.9%	0.9%	0.0%	0.6%	0.8%	9.2%	3.6%	0.0%	4.0%
5	Clifton Retail Park	9.8%	16.4%	28.6%	17.6%	15.1%	2.8%	1.9%	10.3%	1.6%	0.0%	3.6%	10.3%
7	Cleveleys Town Centre	0.0%	1.6%	1.0%	4.2%	0.0%	13.2%	14.7%	6.5%	1.6%	12.7%	0.0%	5.7%
8	Poulton-le-Fylde Town Centre	0.0%	0.8%	7.2%	0.0%	0.0%	0.9%	2.6%	11.7%	0.8%	13.5%	0.0%	3.7%
9	Affinity Outlet	0.0%	3.2%	3.0%	5.5%	5.7%	22.0%	18.1%	16.3%	21.9%	12.3%	0.8%	11.7%
9	Fleetwood Town Centre	1.3%	2.4%	1.0%	0.0%	0.0%	1.9%	8.6%	11.1%	21.1%	8.4%	0.0%	6.0%
11	Garstang Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	24.8%	1.8%

5.59 We can see from Table 5.9 that over 30% of trips from Zones 1, 2, 3, 5 and 6 residents are to Blackpool town centre to purchase clothing and footwear, with the highest proportion being from Zone 1 residents at 66.7% (which is not unexpected in light of the zone covering a substantial proportion of the town centre).

5.60 For Zone 4 residents, Blackpool town centre and Clifton Retail Park are both key destinations, followed by Blackpool Retail Park, attracting 28.1%, 17.6% and 14.9% of trips respectively. Elsewhere, clothing and footwear shopping trips are spread out across a broad range of destinations.

5.61 Looking at destinations within Wyre, Affinity Outlet is a key destination for purchasing clothing and footwear goods, particularly for Zones 6 to 10 residents, with Poulton and Fleetwood town centres being important for their respective Zones' residents (Zones 8 and 9) and Garstang is the principal destination for Zone 11 residents. Blackpool town centre is also a key destinations for residents in Zones 7 to 10 in particular, indicating that there is still a draw of Wyre residents to the town centre.

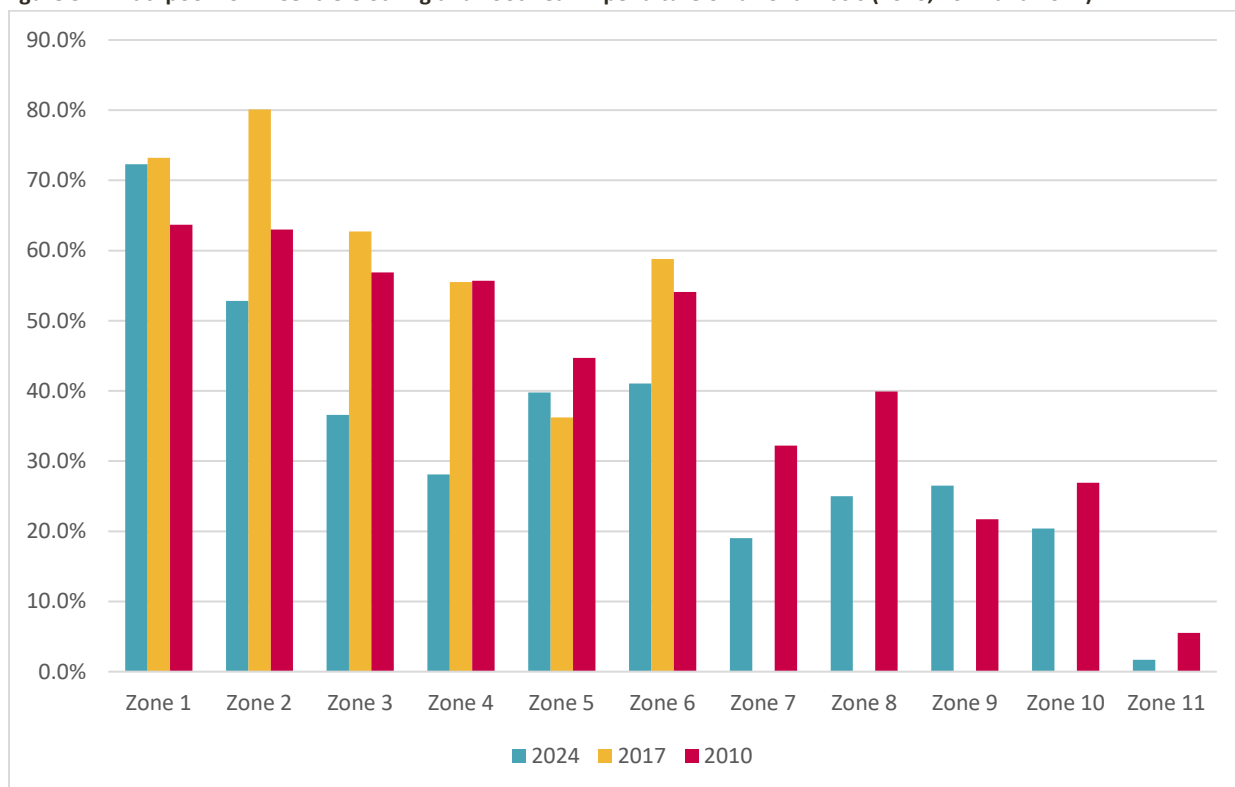
5.62 The Zone with the highest proportion of leakage of clothing and footwear shopping trips and expenditure is Zone 11, from which 61.5% of trips leak to destinations outside of the Study Area (and the authority areas). These trips

are principally going to destinations within Preston, including Deepdale Shopping Park (13.4%) and Preston city centre (4.2%) along with Lancaster city centre (9.2%).

5.63 Figure 5.4 below shows the proportion of comparison expenditure attracted to Blackpool town centre on a zonal basis, comparing the 2024 figures with those published from the 2010 survey. We also include the 2017 figure for Zones 1-6.

5.64 The Figure indicates that other than from Zone 1 and Zone 9 residents, the proportion of clothing and footwear trips attracted to retailers in the town centre has decreased between 2010 and 2024.

**Figure 5.4: Blackpool Town Centre Clothing and Footwear Expenditure on a Zonal Basis (2010, 2017 and 2024)**



### Other Comparison Goods Shopping Patterns

5.65 As set out above, given the proportion of expenditure spent on clothing and footwear goods, it is useful to understand in more detail where such trips are taking place. We also provide below a breakdown of the seven other comparison categories on a zonal basis, looking at the authority areas' retention rates.

5.66 We begin by looking at comparison shopping patterns within Blackpool and then move on to looking at Wyre's shopping patterns.

**Table 5.9: Blackpool Authority Area Individual Comparison Goods Patterns on a Zonal Basis**

	Zone 1 2024 (%)	Zone 2 2024 (%)	Zone 3 2024 (%)	Zone 4 2024 (%)	Zone 5 2024 (%)	Zone 6 2024 (%)
Clothing and Footwear	87.7%	87.9%	77.0%	68.2%	71.0%	44.8%
CDS, DVDs and Books	82.3%	90.8%	79.2%	77.8%	89.4%	50.8%
Small Household Goods	98.7%	96.7%	87.9%	83.5%	89.1%	71.3%
Toys, Games, Bicycles and Recreational Goods	85.6%	95.7%	98.3%	91.9%	95.9%	60.6%
Health and Beauty Goods	84.9%	95.5%	87.3%	88.3%	94.5%	67.4%
Electrical Goods	78.5%	95.7%	95.0%	98.3%	96.5%	81.7%
DIY and Gardening Goods	88.9%	92.2%	81.4%	89.0%	87.4%	56.2%
Furniture, Carpets and Floor Coverings	62.2%	66.3%	59.2%	71.3%	69.3%	62.8%

**5.67** Overall, it is clear that the retention rates of Blackpool authority facilities within Zones 1 to 5 are relatively high. Some key findings from the market share analysis is as follows:

- In terms of CDs, DVDs and books, for residents in Zones 1 to 6, the principal destination for purchasing such goods is Blackpool town centre. Smaller centres across the borough such as South Shore, Highfield Road and Cleveleys within Wyre are also key destinations.
- Looking at small household goods shopping patterns, the principal destinations for Zones 1 to 6 residents is Blackpool town centre, alongside operators at Blackpool Retail Park, including Dunelm. The larger out of centre foodstores, including the Asda at Cherry Tree Road, are also important destinations for purchasing such goods. The borough retention levels for all six zones are high, indicating a good provision of retailers across the authority area.
- Turning to toys, bicycles and recreational goods, Blackpool town centre, Blackpool Retail Park and Smyths Toys at Vicarage Lane are the principal destinations to purchase such goods. The borough zonal retention levels are particularly high for Zones 1 to 5.
- Looking at the final of the 'non-bulky' comparison goods, the health and beauty shopping patterns the zonal retention levels are higher for purchasing such goods, indicating that shoppers will typically choose more local destinations to meet their needs. Out of centre foodstores are important destinations for shoppers to meet their health and beauty shopping needs, alongside the defined centres across the borough.
- Turning to the first of the 'bulky' goods, we can see that residents from each of the six zones are choosing Blackpool Retail Park as their principal destination to purchase electrical goods, with the highest proportion being within Zone 4. Sainsbury's at Talbot Road is a key destination for Zones 2 and 3 residents, most likely due to the presence of the Argos operation.
- In terms of DIY and gardening goods, the retention level across Zones 1 to 5 are high, with Zone 6 just dropping slightly (but the corresponding proportion to Wyre facilities has increased). The principal destination for residents in Blackpool is the B&Q at Whitehills Retail Park.
- Finally, in terms of furniture, carpets and floor coverings, principal destinations include Blackpool town centre, alongside out of centre specialist retailers across the borough. The borough retention levels are less than the other seven categories, indicating residents are choosing facilities elsewhere to meet their needs in some occasions. These destinations include retailers in Wyre, alongside operators in Preston, such as the DFS at Mariners Way.

5.68 We turn to look at the comparison goods patterns within the Wyre zones below.

**Table 5.10: Wyre Authority Area Individual Comparison Goods Patterns on a Zonal Basis**

	Zone 7 2024 (%)	Zone 8 2024 (%)	Zone 9 2024 (%)	Zone 10 2024 (%)	Zone 11 2024 (%)
Clothing and Footwear	46.0%	45.7%	45.4%	50.5%	30.1%
CDS, DVDs and Books	91.0%	81.0%	85.8%	83.5%	64.4%
Small Household Goods	32.3%	46.9%	60.1%	49.5%	49.8%
Toys, Games, Bicycles and Recreational Goods	48.1%	27.5%	53.2%	31.1%	18.3%
Health and Beauty Goods	89.8%	75.3%	80.3%	75.0%	66.2%
Electrical Goods	51.7%	31.2%	57.2%	37.2%	10.2%
DIY and Gardening Goods	61.3%	59.5%	72.0%	59.9%	63.8%
Furniture, Carpets and Floor Coverings	40.4%	40.4%	61.8%	57.0%	40.2%

5.69 Overall, it is clear that the retention rates of Wyre authority facilities for CDs, DVDs and books, health and beauty goods are the strongest, with the electrical goods retention falling lower. We provide commentary in respect of the comparison goods categories below:

- In terms of clothing and footwear, for residents in Wyre, the retention levels are lower than Blackpool, indicating that residents are choosing facilities outside of the authority area to meet their needs. As indicated above, residents are often choosing Blackpool town centre, alongside other facilities outside of the Study Area such as Preston and Lancaster.
- Looking at CDs, DVDs and books, the retention levels are much higher, indicating that residents are looking more locally to meet their needs. Cleveleys and Poulton town centres both play important roles in attracting expenditure, alongside the larger out of centre foodstores within the authority area.
- Looking at small household goods shopping patterns, the retention level within Wyre is significantly lower than that identified for CDs and DVDs. For a number of residents in Zones 7 to 10 in particular, Blackpool Retail Park is an important destination for purchasing such goods. Cleveleys town centre, Affinity and the Asda in Fleetwood also play an important role within the Wyre authority area.
- Turning to toys, bicycles and recreational goods, the retention levels within the Wyre authority area are relatively low, particularly for residents in Zones 8, 10 and 11. Within the authority area, Cleveleys town centre and Affinity are both important destinations. Within Blackpool, the town centre and Smyths Toys are also principal destinations for Wyre residents. Within Zone 11 in particular, residents are choosing Lancaster and Preston destinations to meet their needs.
- Looking at the final of the 'non-bulky' comparison goods, the health and beauty shopping patterns, the retention levels are much higher within the authority area, including within Zone 11 which has in most instances been lower. Residents are choosing destinations closer to home, and town centres including Cleveleys, Poulton, Garstang and Fleetwood are all principal destinations for purchasing such goods.
- Turning to the first of the 'bulky' goods, residents are choosing facilities principally in out of centre locations to purchase electrical goods. Blackpool Retail Park is a principal destination, particularly for residents in Zones 7 to 10. However, both Cleveleys and Fleetwood town centres also attract a relatively high proportion of trips from their respective catchments.

- In terms of DIY and gardening goods, the authority area retention level is higher than that recorded for electrical goods. Again, Cleveleys and Fleetwood town centres are important destinations within the authority area and Garstang town centre is also a key destination for Zone 10 and 11 residents.
- Finally, in terms of furniture, carpets and floor coverings, residents are choosing a mixture of destinations both within and outside of Wyre to meet their needs, with the highest retention rates recorded in Zones 9 and 10. Cleveleys town centre is a principal destination for residents in Zones 7, 8 and 9 and Fleetwood town centre is key for Zone 10 residents. Garstang town centre is also a key destination for Zone 10 and 11 residents.

### Market Share Summary and Identification of Expenditure Claimed by Blackpool and Wyre Retailers

5.70 We identify the convenience goods, comparison goods, and overall market share of Study Area expenditure claimed by retailers located in Blackpool and Wyre authority areas in the below Table 5.11.

**Table 5.11: Comparison Goods Expenditure Retention and Leakage**

Type of Expenditure	2024 Blackpool Residents' Expenditure (£m)	2024 Blackpool Market Share (%)	2024 Wyre Residents' Expenditure (£m)	2024 Wyre Market Share (%)
Study Area Convenience Goods Expenditure	316.5	43.7%	345.4	47.6%
Study Area Comparison Goods Expenditure	384.9	55.2%	217.3	31.2%
Total Study Area Expenditure	701.4	49.3%	562.7	39.6%

Source: Table 25 of Appendix 5

Note: Both presented in a consistent 2023 Prices

- 5.71 In our view, the identified survey results reflect the geography of the Study Area insofar as the two authority areas are coastal and contain the majority of the convenience and comparison expenditure (when considered together). Furthermore, it is acknowledged that there is an attraction to other, larger nearby retail venues, which draw some levels of expenditure, and particularly comparison expenditure from residents in the two authority areas.
- 5.72 Accordingly, where expenditure 'leaks' to destinations outside of the authority areas, this is still generally reflective of logical and sustainable travel patterns.

## 6. Healthcheck Assessments and Land Use

### Introduction

- 6.1 Paragraph 90 of the NPPF indicates that planning policies should promote the long-term vitality and viability of town centres by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries. The same paragraph also states that town centres should accommodate a suitable mix of uses (including housing) and provide for development that reflects a centre's distinctive character.
- 6.2 Paragraph 006 of the Town Centres PPG identifies a range of indicators that should be assessed over time in reviewing the health of a town centre. The indicators include the following:
- diversity of uses;
  - proportion of vacant street level property;
  - retailer representation and intentions to change representation;
  - pedestrian flows;
  - accessibility;
  - perceptions of safety and occurrence of crime;
  - the state of town centre environmental quality;
  - the balance between independent and national multiple retailers; and
  - the extent to which there is an evening and night-time economy offer.
- 6.3 The assessments are based on a site visit which was undertaken in August and September 2024. These assessments should be taken as a 'snapshot' of the performance of each centre at a moment in time.
- 6.4 New healthcheck assessments have been undertaken for Blackpool town centre and the district centres of Highfield Road, Waterloo Road (South Shore), Whitegate Drive, Layton and Bispham in Blackpool; and for the town centres of Fleetwood, Cleveleys, Garstang and Poulton in Wyre. The detailed healthcheck assessments are provided at Appendix 3 and we provide a summary of the key conclusions below.
- 6.5 The healthchecks are based on the boundaries as defined by Experian Goad, and therefore in some cases include areas outside of the defined town centre boundaries as part of the overarching composition. Plans of the areas adopted for the purposes of the healthchecks are included with the healthchecks at Appendix 3.
- 6.6 For the purposes of the tables set out in this section of our report and in the full healthchecks in Appendix 3, the uses that fall into each land use category are as per the table below.

**Table 6.1 Land Use Categories**

Categories	
Comparison	Antique Shops, Art & Art Dealers, Booksellers, Carpets & Flooring, Catalogue Showrooms, Charity Shops, Chemist & Drugstores, Children's & Infants Wear, Clothing General, Crafts, Gifts, China & Glass, Cycles & Accessories, Department & Variety Stores, DIY & Home Improvement, Electrical & Other Durable Goods, Florists, Footwear, Furniture Fitted, Furniture General, Gardens & Equipment, Greeting Cards, Hardware & Household Goods, Jewellery, Watches & Silver, Ladies & Men's Wear & Acc., Ladies Wear & Accessories, Leather & Travel Goods, Men's Wear & Accessories, Music & Musical Instruments, Music & Video Recordings, Newsagents & Stationers, Office Supplies, Other Comparison Goods, Photographic



Categories	
	& Optical, Second-hand Goods, Books, etc., Sports, Camping & Leisure Goods, Telephones & Accessories, Textiles & Soft Furnishings, Toiletries, Cosmetics & Beauty Products, Toys, Games & Hobbies, Vehicle & Motorcycle Sales, Vehicle Accessories
<b>Convenience</b>	Bakers & Confectioners, Butchers, CTN, Convenience Stores, Fishmongers, Frozen Foods, Greengrocers, Grocers & Delicatessens, Health Foods, Markets, Off Licences, Shoe Repairs Etc, Supermarkets
<b>Retail Service</b>	Clothing & Fancy Dress Hire, Dry Cleaners & Launderettes, Filling Stations, Health & Beauty, Opticians, Other Retail Services, Photo Processing, Photo Studio, Post Offices, Repairs, Alterations & Restoration, Travel Agents, TV, Cable & Video Rental, Vehicle Rental, Vehicle Repairs & Services
<b>Leisure</b>	Bars & Wine Bars, Bingo & Amusements, Cafes, Casinos & Betting Offices, Cinemas, Theatres & Concert Halls, Clubs, Disco, Dance & Nightclubs, Fast Food & Take Away, Hotels & Guest Houses, Public Houses, Restaurants, Sports & Leisure Facilities
<b>Financial &amp; Business Service</b>	Building Societies, Building Supplies & Services, Business Goods & Services, Employment & Careers, Financial Services, Legal Services, Other Business Services, Printing & Copying, Property Services, Retail Banks
<b>Vacant</b>	Vacant Retail & Service Outlets

## Blackpool Town Centre

6.7 The composition of Blackpool town centre is set out at Table 6.2 below. As the table highlights, the floorspace vacancy rate in the town centre (11.8%) is lower than the national average of 14.3%. Conversely, the unit vacancy rate (20.8%) is substantially above the UK average (14.1%). This finding indicates that the majority of Blackpool's vacancies are relatively small in scale.

6.8 Our full healthcheck at Appendix 3 provides a more detailed breakdown of the changes in the land use composition of the town centre and how and why this has changed over time.

**Table 6.2: Composition of Blackpool Town Centre**

GOAD Category	Floorspace at 2024 (sq.m)	Floorspace at 2024 (%)	Floorspace at 2017 (sq.m)	Floorspace at 2017 (%)	Floorspace UK Average at 2024 (%)	Units at 2024 (no.)	Units at 2024 (%)	Units at 2017 (no.)	Units at 2017 (%)	Units UK Average at 2024 (%)
Comparison	38,000	21.7%	53,220	29.0%	29.2%	174	23.6%	198	27.4%	26.3%
Convenience	16,080	9.2%	20,520	11.2%	15.6%	56	7.6%	56	7.7%	9.3%
Financial Service	4,120	2.3%	7,440	4.1%	6.2%	26	3.5%	45	6.2%	8.3%
Leisure Service	89,180	50.8%	78,500	42.8%	26.7%	269	36.5%	235	32.5%	25.8%
Retail Service	7,330	4.2%	4,460	2.4%	7.4%	59	8.0%	51	7.1%	16.0%
Vacant	20,680	11.8%	19,270	10.5%	14.3%	153	20.8%	138	19.1%	14.1%
<b>Total</b>	<b>175,390</b>	<b>100.0%</b>	<b>183,410</b>	<b>100%</b>	<b>100.0%</b>	<b>737</b>	<b>100.0%</b>	<b>723</b>	<b>100%</b>	<b>100.0%</b>

Source: Composition of centre derived from Nexus Planning surveys of August 2024; Composition of centre derived from Blackpool Retail and Leisure Study 2018; and UK Average from Experian Goad report of September 2024

6.9 Table 6.3 provides our SWOT analysis and overall conclusions on the vitality and viability of Blackpool town centre. A full healthcheck of the town centre is provided at Appendix 3.

**Table 6.3: SWOT analysis and conclusions for Blackpool Town Centre**

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>Blackpool's retail offer is supported by the Houndshell Shopping Centre, which includes a mix of national multiple retailers, a cinema, and an on-site car park, enhancing convenience for shoppers and visitors.</li> <li>The centre represents the principal commercial offer within the Fylde Coast and provides an important focus of main town centre uses to meet residents' needs.</li> <li>The town's tourism economy is bolstered by its iconic attractions – such as Blackpool Tower, the Pleasure Beach, and the Winter Gardens – which draw footfall at different times of the year.</li> <li>Good public transport links, including the tram system, train station, and a well-connected bus network, make the centre accessible to residents and visitors alike.</li> <li>Most areas within Blackpool town centre are well pedestrianised and provide good accessibility for individuals with disabilities.</li> <li>The town centre boasts a strong leisure offer, which is further enhanced by the recently refurbished Abingdon Street Market.</li> <li>The significant levels of investment within the centre are a key strength, providing wider positive investor confidence for the future. Such schemes will bring much needed expenditure into the centre and diversify the offer further.</li> </ul>	<ul style="list-style-type: none"> <li>The town's commercial provision is heavily reliant on tourist trade, resulting in seasonal fluctuations in footfall and sales, which can impact business sustainability.</li> <li>A number of the operators within the centre are focused on the 'budget' end of the market, which do not attract a wide demographic into the centre.</li> <li>Although the provision has improved since the 2018 Study, the offer of family dining opportunities is still considered to be both a weakness and an opportunity.</li> <li>Vacant units along key streets, such as Talbot Road and Church Street, detract from the overall appearance and vibrancy of the centre, creating areas of underutilisation.</li> <li>Some areas of the town centre are of poorer environmental quality and would benefit from investment and public realm enhancements, particularly around the periphery of the centre.</li> <li>Perceptions of anti-social behaviour, crime, and public safety can act as a deterrent for some visitors, particularly in the evening.</li> <li>There are no notable green spaces within the centre.</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>The approved Talbot Gateway Phase 2 project, featuring a new hotel (this being the Holiday Inn which is now completed) and office space, provides scope to diversify the town centre's offer and increase local employment opportunities. This has the added potential of increasing available expenditure within the centre to help support commercial businesses.</li> <li>The Blackpool Town Centre Action Plan establishes a number of opportunities to help enhance the centre, including improvements to the public realm, providing space for community events within the centre, improving the town centre infrastructure, improving shopfronts and improving the town centre's connectivity.</li> <li>The high number of vacant properties creates potential for adaptive reuse (subject to market conditions and other factors), including independent retail, leisure, and workspace developments, fostering a more diverse and vibrant economy.</li> </ul>	<ul style="list-style-type: none"> <li>Competing retail destinations, such as Preston and Manchester, and online shopping pose a challenge for Blackpool in attracting comparison shopping spend.</li> <li>The direct impact of out of centre shopping and leisure facilities continues to affect the town centre, resulting in the draw of expenditure away from businesses.</li> <li>Continued economic uncertainty and cost-of-living pressures may impact visitor numbers and consumer spending, which are key to the town centre's vitality.</li> <li>Further closures of national multiple retailers and banking facilities could exacerbate existing vacancy issues and reduce the centre's overall appeal.</li> </ul>

## Conclusions

Blackpool town centre plays a critical role in supporting the retail, leisure, and service needs of its residents, as well as attracting a significant number of visitors throughout the year. The Houndhill Shopping Centre acts as a key anchor, offering a range of national multiples focused principally on the comparison sector, alongside a range of leisure uses including the IMAX cinema. Other key attractions within or in proximity to the town centre include the Blackpool Tower, Winter Gardens, and the Pleasure Beach, which ensure a steady stream of tourists that bolster footfall and expenditure.

However, the centre faces notable challenges, including high vacancy rates, areas of underinvestment, and an over-reliance on the tourism economy, which creates seasonal fluctuations in performance. Perceptions of anti-social behaviour and crime also impact the centre's appeal, particularly in the evening economy. Improved integration between key zones—such as the seafront, the town centre, and major developments like Blackpool Central—could help encourage linked trips and improve overall economic performance.

Recent and planned investments, including, the Houndhill Shopping Centre extension, and the Talbot Gateway project, represent significant opportunities to enhance the centre's offer and attract higher-spending demographics. Additionally, efforts to improve public realm, connectivity, and branding could strengthen Blackpool's position as a key destination for both leisure and business tourism.

Considering these factors, our overall conclusion is that while Blackpool town centre exhibits signs of vulnerability, particularly in its retail sector, there are considerable opportunities to leverage its existing strengths, ongoing investments, and cultural appeal to secure its vitality and viability for the future. Substantial work has already been undertaken to redevelop key sites, and future opportunities for redevelopment to bring a diversification of uses are planned, along with improvements to the environmental quality and public realm. All of these elements are working towards improving the town centre's vitality and viability and whilst there is some considerable distance to go, the trajectory for the town centre is positive on the whole.

## Blackpool's District Centres

- 6.10 The composition of each of the district centres in the Blackpool authority area is provided in Table 4.4 below. Vacancy rates also vary across the district centres but, with the exceptions of South Shore and Bispham, fall below UK averages.

**Table 6.4: Composition of Blackpool's District Centres at August 2024**

Centre	Comparison Units (%)	Convenience Units (%)	Financial & Business Service Units (%)	Leisure Units (%)	Retail Service Units (%)	Vacant Units (%)
Highfield Road	24.7%	9.7%	7.5%	34.4%	18.3%	5.4%
Waterloo Road (South Shore)	21.7%	7.1%	4.6%	26.3%	8.8%	31.7%
Whitegate Drive	17.7%	8.3%	14.6%	19.8%	29.2%	10.4%
Layton	22.9%	12.5%	2.1%	29.2%	31.3%	2.1%
Bispham	21.8%	3.8%	5.1%	25.6%	26.9%	16.7%
<b>National Average</b>	<b>29.2%</b>	<b>15.6%</b>	<b>6.2%</b>	<b>26.7%</b>	<b>7.4%</b>	<b>14.3%</b>
<b>Blackpool DCs Average</b>	<b>21.8%</b>	<b>8.3%</b>	<b>6.8%</b>	<b>27.1%</b>	<b>22.9%</b>	<b>13.3%</b>

Source: Composition of centre derived from Nexus Planning surveys of August 2024; UK Average from Experian Goad report of September 2024

- 6.11 Tables 6.5 to 6.9 provide our SWOT analysis and overall conclusions on the vitality and viability of Blackpool's district centres.

**Table 6.5: SWOT analysis and conclusions for Highfield Road District Centre**

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>• A relatively diverse composition of uses, with a particularly strong leisure offer.</li> <li>• Highfield Road has the highest proportion of comparison and leisure units out of the district centres in the borough.</li> <li>• Below national average vacancy rates in terms of both the proportion of floorspace and units.</li> <li>• Good provision of retail service operators, meeting residents' needs and encouraging trips into the centre.</li> </ul>	<ul style="list-style-type: none"> <li>• Busy vehicular traffic running through the centre</li> <li>• A relatively high number of takeaway uses, particularly towards the eastern periphery of the centre.</li> <li>• Cars often parking partly on pavements on either side of the road, detracting from the overarching environmental quality in places.</li> <li>• The number of takeaways present results in shutters being down during the day, detracting from the aesthetics of the centre in some areas.</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>• Opportunities to further enhance the composition of uses to best meet local residents' needs.</li> <li>• Potential to enhance the environmental quality of the centre through encouraging enhancements to shopfronts with new operators.</li> <li>• Opportunity to enhance the public realm through additional green infrastructure, street furniture and encouragement of outdoor seating where appropriate.</li> </ul>	<ul style="list-style-type: none"> <li>• Continued pressure for the reoccupation of otherwise vacant units with takeaway operators.</li> <li>• Pressure from out of centre retail and leisure development which could draw trade away from the centre.</li> </ul>
Conclusions	
<p>Highfield Road is linear in form, beginning with the terrace of commercial units at Lytham Road, leading to Highfield Road on the west, and the junction of Abbey Road and Highfield Road to the east.</p> <p>The centre comprises a total of 9,350 sq.m of commercial floorspace and 93 units. It is not 'anchored' by a larger convenience operator but does include a Tesco Express, alongside a range of smaller convenience, comparison, leisure and service uses. The centre's comparison and leisure offer is particularly strong in terms of the proportion of units, and the vacancy level is lower than the national average.</p> <p>There is an opportunity to enhance the centre through public realm improvements including additional green infrastructure, street furniture and the encouragement of outdoor seating for leisure operators, where appropriate and the physical environment allows.</p> <p>Overall, the centre is performing its role as a district centre, meeting the needs of the local residents in the walk-in catchment. It is considered to be vital and viable.</p>	

**Table 6.6: SWOT analysis and conclusions for Waterloo Road (South Shore) District Centre**

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>Waterloo Road has an above average provision of comparison floorspace (largely due to the presence of Parkinson Way Retail Park which includes The Range)<sup>15</sup>. Although towards the 'budget' end of the market, the offer and range of comparison operators is considered to be varied.</li> <li>There are a number of leisure units, although these are predominantly public houses.</li> <li>A varied provision of commercial units at a range of scales, including larger format units for some national multiples.</li> <li>Although the proportion of units occupied by convenience operators is below the national average, the nature of operators meets residents' needs, including both top-up and main food shopping opportunities.</li> </ul>	<ul style="list-style-type: none"> <li>The centre experiences very high vacancy rates, in terms of both the proportion of units and floorspace.</li> <li>Vacant units are of a variety of scales and located throughout the centre.</li> <li>The vacant units and inactive frontages detract from the environmental quality of the centre, leaving some particularly noticeable 'holes' along Waterloo Road.</li> <li>The operators are principally focused around the 'budget' market which although provides opportunity to purchase goods, limits the overarching diversity of the centre.</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>The centre benefits from an existing good local walk-in catchment, along with some inflow from tourism spending which can help to support businesses in the future.</li> <li>The vacant units and sites present opportunities to introduce new and alternative uses within the centre which could help to draw in additional spending.</li> <li>The centre's location in proximity to the seafront provides opportunities to encourage additional leisure uses within the centre to encourage additional footfall along Waterloo Road.</li> <li>Further opportunities exist to enhance the outside seating for leisure operators, through improvements to the public realm.</li> </ul>	<ul style="list-style-type: none"> <li>Ongoing long-term vacancies and lengthy marketing for some of the larger units and sites indicates a lack of investment interest. There may be opportunities to encourage investment through some wider public funding streams which could bring larger sites back into economically viable use.</li> <li>Ongoing commercial market implications may result in further vacancies in the centre.</li> </ul>
Conclusions	
<p>Overall, we consider the centre to still be performing its designated role as a district centre in terms of meeting the needs of local residents within the catchment, by providing facilities for convenience shopping and service uses (hairdressers, health and beauty salons and so on).</p> <p>However, the centre has a high vacancy rate in terms of both units and floorspace, with some particularly prominent units and sites detracting significantly from the centre's environmental quality. Further work to enhance the fascias and public realm within the centre could assist in improving the overall vitality of the district centre, along with the encouragement of alternative uses for the otherwise vacant units.</p>	

<sup>15</sup> As noted above, the Goad boundaries extend beyond the defined centre boundary, and as such Parkinson Way Retail Park does not fall within the defined centre but is included in the composition figures.

**Table 6.7: SWOT analysis and conclusions for Whitegate Drive District Centre**

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>Whitegate Drive district centre has a good overarching diversity of uses, meeting local residents' needs.</li> <li>The centre benefits from a particularly strong financial and retail service offer.</li> <li>The centre is surrounded by dense residential areas, providing a good walk-in catchment for the businesses.</li> <li>Good provision of national multiple top-up convenience facilities.</li> <li>The centre benefits from some green infrastructure and is generally well-kept with a high environmental quality overall.</li> <li>Good public transport links, with accessible bus stops along Whitegate Drive.</li> </ul>	<ul style="list-style-type: none"> <li>The centre is formed either side of a busy arterial route, resulting in a dominance of vehicular traffic through the centre.</li> <li>Direct and adjacent car parking is not always available, which is resulting in some pressure on surrounding streets and resultant parking permit areas.</li> <li>Some parking from businesses (either operators or visitors) takes place on the pavement, which detracts from the overarching pedestrian safety of the centre.</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>Opportunities exist in the centre to enhance the commercial offer through the introduction of a wider mix of retail and leisure operators.</li> <li>The centre benefits from wider pavements in some areas, which could lend themselves to opportunities for outdoor seating.</li> <li>Further opportunities exist to enhance the green infrastructure, building on the elements already present in the centre.</li> </ul>	<ul style="list-style-type: none"> <li>Ongoing risk to pedestrian safety in some parts of the centre through the dominance of vehicular traffic.</li> </ul>
Conclusions	
<p>Whitegate Drive district centre is a relatively diverse centre with a below average vacancy rate in terms of both the number of units and the proportion of floorspace. In terms of the level of floorspace, the centre is one of the smaller district centres in the authority area. However, the composition and offer of the centre ensures that it still meets the needs of the local catchment. The centre is particularly well provided for in terms of the financial and business offer and the retail service offer and provides a good top-up convenience offer for residents.</p> <p>Due to the centre's location and formation around a busy road, vehicular traffic dominates somewhat and there are instances of car parking on the pavement which can impact on pedestrian safety. There are some instances where green infrastructure benefits the centre and it may be that there are opportunities to enhance this further throughout the length of Whitegate Drive.</p> <p>Overall, the centre is considered to be healthy and is meeting the needs of the local catchment well.</p>	

**Table 6.8: SWOT analysis and conclusions for Layton District Centre**

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>Layton district centre has a particularly strong leisure and retail service offer, alongside a wider retail offer.</li> <li>There are a range of both national multiple and independent operators, which provide a good mix for the local community.</li> <li>The centre benefits from some positive public realm elements and features which help to add to the environmental quality.</li> <li>Traffic calming measures within the centre help to enhance pedestrian safety and take the dominance of vehicular traffic away.</li> <li>The centre benefits from good access to public transport, with easy access to bus stops along the A586.</li> <li>The vacancy level in terms of both units and floorspace is significantly below the national average, ensuring that in the most part, there are active ground floor uses throughout. The vacancy rate is also the lowest of the borough's district centres.</li> </ul>	<ul style="list-style-type: none"> <li>Some of the public realm elements such as seating are provided in the centre of a relatively busy road and therefore do not provide for a safe or quiet environment for people to sit and enjoy the centre's surroundings.</li> <li>Takeaway uses make up 50% of the centre's leisure offer and therefore, the leisure offer as a whole is not particularly diverse. There is a concentration on Westcliffe Drive which can in part, detract from the centre, particularly with closed shutters during the day.</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>There are opportunities within Layton to further build on the strong leisure offer, encouraging additional uses and the level of footfall throughout the daytime and evening.</li> <li>There may be opportunities to build on the provision of outdoor seating for leisure operators.</li> <li>There are opportunities to further enhance the public realm, improving the green infrastructure and creating safe spaces for people to meet informally to enjoy their surroundings.</li> </ul>	<ul style="list-style-type: none"> <li>Additional takeaway uses could detract from the offer of the centre, and proposals should be monitored and resisted wherever possible.</li> </ul>
Conclusions	
<p>Layton district centre is located approximately 2 km to the north-east of Blackpool town centre. Talbot Road adjoins the south-western boundary of the district centre, linking Layton with Blackpool town centre.</p> <p>The centre comprises a total of 4,871 sq.m of commercial floorspace, across a total of 48 units. It is not the largest district centre in the borough but provides a good diversity of uses, particularly focused around the leisure and retail service offer. The centre also includes both a Co-op foodstore and a Morrisons Daily, providing a good local convenience provision for the catchment.</p> <p>The centre benefits from a good quality public realm, which has sought to encourage people to sit and enjoy the centre. However, there are instances where this is perhaps not designed with safety in mind, and the location of benches and areas to meet are not within the optimal places within the centre.</p> <p>Overall, however, although one of the smaller district centres in the borough, it provides for its local catchment well and includes a good offer of commercial uses predominantly for the walk-in catchment. It is considered to be a vital and viable centre and continues to perform its role as a district centre well.</p>	

**Table 6.9: SWOT analysis and conclusions for Bispham District Centre**

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>Bispham district centre has a relatively diverse comparison offer, although the proportion of floorspace and units falls below the national average.</li> <li>The centre is anchored by a large Sainsbury's store, which is the largest convenience operator present across all of the district centres.</li> <li>The centre has a good retail, retail service and leisure offer, providing well for the local catchment.</li> <li>Efforts have been made to help enhance the public realm and there is a clear stakeholder intervention in some parts of the centre.</li> <li>The centre benefits from very good public transport modes and provides a good level of car parking, both on and off street.</li> <li>The bowling green is a positive contributor to the centre's overarching offer, providing space to play bowls, and adds to the environmental quality of the centre.</li> <li>Wider pavements in some locations of the centre provide good opportunities for outdoor seating, which have been explored by some operators.</li> </ul>	<ul style="list-style-type: none"> <li>The centre has a relatively high vacancy rate, particularly in terms of the number of vacant units. Although the vacant units are broadly spread across the centre and therefore do not detract significantly from the environmental quality, the vacant units are still a cause for concern.</li> <li>The Sainsbury's foodstore, although a positive contributor to the overarching composition and offer of the centre, does not add much to the visual appearance. In this regard, the store has its back to Red Bank Road, with the main access point directly off the dedicate car park. As such, the linked trips to the wider centre may not be as frequent as if the store had an active frontage along Red Bank Road.</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>There could be an opportunity around opening up the relatively extensive blank elevation of the Sainsbury's along Red Bank Road.</li> <li>There is an opportunity to further build on the outdoor seating provision within the centre, encouraging leisure operators to consider their options. This will encourage longer dwell times and provide more activity throughout the centre.</li> <li>The largest vacant unit within the centre fronts onto Queens Promenade and provides a good opportunity for revitalisation.</li> </ul>	<ul style="list-style-type: none"> <li>The number of vacant units is a cause for concern and efforts should be made to encourage the reoccupation of these moving forward.</li> </ul>
Conclusions	
<p>Bispham district centre is located approximately 5 km north of Blackpool town centre. The western boundary of the centre adjoins the Queen's Promenade which runs southwards towards Blackpool town centre. The centre is in walking distance of the seafront, and the Bispham tram stop is located adjacent to the Promenade. The centre is formed either side of Red Bank Road, with some on street parking and a quantum of off-street parking available adjacent to the Sainsbury's store.</p> <p>The centre comprises a total of 12,579 sq.m or 78 units, and other than the financial sector, is relatively diverse. The centre is one of the few anchored by a larger format convenience operator, which serves an important role in encouraging journeys into the centre.</p> <p>Overall, it is considered that the centre functions well as a district centre and is vital and viable overall, despite the relatively high number of vacant units.</p>	



## Wyre's Town Centres

6.12 The composition of each of the town centres in the Wyre authority area is provided in Table 6.10 below. With the exception of Fleetwood, Wyre's town centres enjoy lower-than-average vacancy rates.

**Table 6.10: Composition of Wyre's Town Centres at August 2024**

Centre	Comparison Units (%)	Convenience Units (%)	Financial & Business Service Units (%)	Leisure Units (%)	Retail Service Units (%)	Vacant Units (%)
Cleveleys	32.6%	7.7%	8.4%	23.8%	20.1%	7.3%
Fleetwood	21.7%	10.4%	6.5%	18.3%	19.1%	23.9%
Garstang	27.2%	9.6%	13.2%	20.6%	23.5%	5.9%
Poulton	21.9%	7.5%	8.2%	36.3%	19.2%	6.8%
<b>National Average</b>	<b>29.2%</b>	<b>15.6%</b>	<b>6.2%</b>	<b>26.7%</b>	<b>7.4%</b>	<b>14.3%</b>
<b>Wyre TCs Average</b>	<b>25.9%</b>	<b>8.8%</b>	<b>9.1%</b>	<b>24.7%</b>	<b>20.5%</b>	<b>11.0%</b>

Source: Composition of centre derived from Nexus Planning surveys of August 2024; UK Average from Experian Goad report of September 2024.

6.13 Tables 6.11 to 6.14 provide our SWOT analysis and overall conclusions on the vitality and viability of Wyre's town centres. Full copies of the healthchecks are provided at Appendix 3. It is important to note that the Goad boundaries do not always reflect the current defined town centre boundaries for Wyre's centres, and therefore the composition analysis does, in some instances, cover areas outside of the defined centre.

**Table 6.11: SWOT analysis and conclusions for Fleetwood Town Centre**

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>Strong convenience sector, anchored by the Asda superstore on Cop Lane</li> <li>Fleetwood Market, which has recently benefitted from public-sector investment, enjoys high occupancy rates and acts as a significant visitor draw</li> <li>Linear layout and relatively flat topography make the centre easily navigable, including for those with mobility impairments.</li> </ul>	<ul style="list-style-type: none"> <li>Comparison provision falls below national averages, and the balance is tilted towards the lower or value end of the market</li> <li>The leisure sector, and particularly the evening economy, is somewhat underdeveloped for a town of Fleetwood's size</li> <li>Poor connectivity between Affinity and the town centre, and between Asda and Lord Street</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>Wyre Council has recently approved a masterplan for the rejuvenation of Fleetwood's waterfront – with four key projects comprising the redevelopment of Marine Hall, the refurbishment of Fleetwood Leisure Centre, improvements to the public realm and reconfiguration of the promenade, and the development of a 'beach huts' accommodation offer – with the aim of boosting tourism and the local economy</li> </ul>	<ul style="list-style-type: none"> <li>Competition from Affinity, especially for anchor national multiple comparison and leisure occupiers</li> <li>The town centre contains just one bank (Halifax on Poulton Street), which is expected to close in June 2025 meaning residents would be left without a key financial service use. No formal plans have been announced about its replacement., although Halifax has stated that it has 'plans for a Banking Hub in this area'.<sup>16</sup></li> </ul>

<sup>16</sup> See: <https://www.halifax.co.uk/helpcentre/everyday-banking/banking-near-you/branch-closures.html>, accessed 9th May 2025.

- The Future Fleetwood partnership currently supports a number of projects to encourage the economic development of the town centre
- High unit vacancy rate creates opportunities for redevelopment/diversification

## Conclusions

Fleetwood performs well in providing for the convenience retail and service needs of its residents, with its Asda superstore in particular providing an extensive offer and drawing expenditure from a substantial catchment. On its trading days, Fleetwood Market also constitutes a major draw, attracting coach trips and other visitors from across the North West.

However, the town centre's non-food shopping sector is impacted by its proximity to Affinity, which has resulted in a relative lack of national multiples and an offer that is largely skewed towards the lower or value end of the market. Improved connectivity between Affinity and the town centre could help to generate linked trips to help support the vitality and viability of Fleetwood.

Another key challenge for Fleetwood is its high vacancy rates<sup>17</sup>, which are above national averages in terms of both floorspace and units, and which consequently have a negative impact on the street-scene and wider centre environment. One beneficial way to repurpose some of the town centre's vacant retail floorspace could be the introduction of a more diverse range of uses to support the evening economy, especially family restaurants.

In recent years, Fleetwood has benefitted from substantial public-sector investment and partnership working through Future Fleetwood, including improvements to the appearance and working environment of the Market. More recent planned interventions, and particularly the projects outlined in the Fleetwood Waterfront Leisure Masterplan 2024, represent significant opportunities to build on and complement this work in order to secure Fleetwood's long-term resilience.

Taking all of these factors into account, our overall conclusion is that while the health of Fleetwood town centre is currently vulnerable, there are considerable opportunities to enhance its vitality and viability over the long term.

**Table 6.12: SWOT analysis and conclusions for Cleveleys Town Centre**

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>• Cleveleys performs well as a food shopping and service destination, anchored by Aldi and supported by a good range of national multiple convenience retailers and independent traders that fulfil many of the day-to-day needs of residents</li> <li>• Strong family-focussed daytime leisure offer comprising various amusement arcades, cafés and restaurants</li> <li>• Low vacancy rates compared to UK averages, particularly in terms of floorspace</li> <li>• Footfall data show that Cleveleys is by far Wyre's busiest town centre, attracting almost 1.5m daily visits in 2022 and well over 1m visits in the first nine months of 2023</li> <li>• Significant investment (amounting to over £20m in public funding) has resulted in a more attractive Promenade and seafront</li> </ul>	<ul style="list-style-type: none"> <li>• Tramway that bisects the centre and the elongated nature of its high street (measuring c. 700m) are barriers to walkability</li> <li>• Many of Cleveleys' shopfronts would benefit from modernisation and the bus station in particular needs further phases of enhancements to its appearance</li> <li>• The evening economy could be better developed, with the centre lacking a focal point for night-time uses and with only two hotels within its Goad area (both of which are independent)</li> </ul>

<sup>17</sup> As explained in the full healthcheck in Appendix 3, the Goad area of Fleetwood is larger than the defined Town Centre Boundary. Nonetheless, vacancy rates are above national averages in both areas.

<ul style="list-style-type: none"> <li>Well-connected by public transport, with its own tram stop and bus station</li> </ul>	
Opportunities	Threats
<ul style="list-style-type: none"> <li>Role as a seaside visitor attraction offers opportunities for the development of evening food and drink and/or hotel uses to capitalise on tourist trade</li> <li>Ambition to expand and relocate the current Cleveleys Market into a more permanent, sheltered location</li> <li>The bus station is a key gateway location/arrival point for visitors that would benefit greatly from refurbishment or redevelopment</li> <li>Whilst the bus station has had its first phase of enhancement through a wall mural there are opportunities for further phases of enhancement to its appearance</li> </ul>	<ul style="list-style-type: none"> <li>Competition from Blackpool town centre, in particular, for overnight visitor accommodation</li> <li>Comparison offer is focussed towards the lower or value end of the market, which may hinder the town centre's ability to draw visitors from all market sectors</li> <li>Few opportunities for large-scale redevelopment within the centre boundary and limited options for significant edge-of-centre development due to density of surrounding built form</li> </ul>
Conclusions	
<p>Cleveleys town centre performs well in serving a dual function as both a shopping and service destination that fulfils the everyday needs of local residents, as well as a seaside visitor attraction underpinned by a strong family-friendly leisure offer. As a consequence, the centre enjoys high footfall and low vacancy rates, which contribute to a general perception of safety and security during daytime hours.</p> <p>The evening economy could be better developed, with the centre lacking a focal point for night-time uses that could ensure they become mutually reinforcing. Similarly, the Goad area of Cleveleys contains just two hotels, with the majority of overnight visitors staying in Blackpool and undertaking daytrips to the town centre.</p> <p>Accessibility is a key strength, particularly via public transport, with Cleveleys being well-served and benefitting from its own tram stop and bus station. However, the tramline does obstruct pedestrian movement between the west and east of the centre, and the elongated nature of the high street (which measures c. 700m) is another barrier to walkability.</p> <p>While the town centre has benefitted from investment in its seafront and Promenade, many of its shopfronts would benefit from modernisation and the bus station in particular needs further phases of enhancements to its appearance. Nevertheless, the centre is generally free of graffiti and litter, and its linear layout, wide streets and flat topography make it traversable for those with impaired mobility. Our overall conclusion is that Cleveleys is a reasonably vital and viable town centre.</p>	

**Table 6.13: SWOT analysis and conclusions for Garstang Town Centre**

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>Strong retail offer, being anchored by the in-centre Booths and Aldi supermarkets and containing a good range of high-quality independent convenience and comparison operators</li> <li>Garstang's popular Indoor and Outdoor Markets contribute to the diversity and vibrancy of its shopping provision</li> <li>The town centre enjoys very low vacancy rates compared to UK averages, especially in terms of floorspace</li> </ul>	<ul style="list-style-type: none"> <li>Although current parking provision meets most current demand, there is a lack of long-stay parking and visitors report difficulty finding spaces at peak times</li> <li>While there are some late-opening food and drink uses that contribute to the evening economy, these lack a focal point which would allow them to become more mutually reinforcing.</li> <li>Representation from comparison national multiples is limited and largely comprises charity shops, albeit the</li> </ul>

<ul style="list-style-type: none"> <li>Garstang is compact in nature and all parts enjoy at least a moderate level of footfall, so that it feels safe and secure during the day</li> <li>The environmental quality of Garstang is generally high, with the town centre falling within a Conservation Area and containing a number of high-quality listed buildings</li> </ul>	town centre enjoys a good range of independent non-food retailers
Opportunities	Threats
<ul style="list-style-type: none"> <li>Potential for the in-centre Cherestanc Square to be 'reimagined' as civic space with opportunities for commercial leisure uses</li> <li>A Town Centre Parking Strategy, as recommended in the Garstang Regeneration Framework, could help to address the identified parking issues</li> <li>The introduction of dedicated parking spaces for buses could increase Garstang's ability to attract coach trips</li> <li>Scope to increase diversity in the leisure offer through, for example, the introduction of more family-focussed facilities or upmarket restaurants that could capitalise on the centre's affluent catchment</li> </ul>	<ul style="list-style-type: none"> <li>Few opportunities for large-scale redevelopment within and on the edge of Garstang due to its historic nature and the surrounding development</li> <li>As with many centres, Garstang has experienced a number of bank closures in recent years as more banking services have moved online. Natwest is the only remaining retail bank and is expected to close in 2025, though no definite plans have been announced for its replacement.<sup>18</sup> The town centre does contain three building societies.</li> </ul>
Conclusions	
<p>The historic and compact nature of the town centre means that Garstang offers a pleasant shopping and leisure environment which attracts good levels of footfall. Garstang's market heritage is evident, with both its Indoor Market and its popular Thursday Outdoor Market hosting a variety of unique local and artisanal traders, which contribute to the appeal of the centre.</p> <p>The convenience offer is particularly strong, being anchored by the in-centre Booths and Aldi supermarkets and complemented by a range of high-quality independents. With regard to comparison shopping, while there is a lack of national multiples in the town centre, we consider one of Garstang's key strengths to be the quality and quantity of its independent retailers.</p> <p>The leisure offer – while including several independent pubs, bars, restaurants and cafés – would benefit from increased diversity in the form of more family-focussed facilities or the introduction of more upmarket restaurants to capitalise on the centre's affluent catchment.</p> <p>Although research for the Garstang Regeneration Framework suggests that the current provision is meeting most of the demand, parking issues are another key challenge for the town centre. There is a lack of long-stay parking and no dedicated coach parking spaces, both issues that could be addressed through a Town Centre Parking Strategy. In general, however, the centre is accessible by a range of means of transport and reasonably walkable.</p> <p>Our overall conclusion is that Garstang is a healthy town centre. It is performing well when compared against several key indicators and enjoys low vacancy rates both in terms of the number of units and proportion of floorspace.</p>	

<sup>18</sup> See: <https://www.natwest.com/banking-with-natwest/other-ways-to-bank-with-natwest/natwest-branch-banking/branch-closures.html>, accessed 9th May 2025.

**Table 6.14: SWOT analysis and conclusions for Poulton Town Centre**

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>Poulton serves an important main and top-up food shopping function for local residents that caters for a broad spectrum of the grocery shopping market</li> <li>The town centre is a significant local food and drink destination, with a thriving evening economy. The majority of leisure operators are independent and of high quality.</li> <li>Vacancy rates in Poulton are well below the national averages with regard to both floorspace and the proportion of units.</li> <li>Good levels of footfall throughout</li> <li>Well-connected by road and public transport, with its own railway station</li> <li>Poulton boasts an attractive town centre, with its pedestrianised areas offering a pleasant shopping and leisure experience. Greenspace and mature trees are provided by the Church of St Chad and the edge-of-centre Jean Stansfield Memorial Park.</li> <li>The Teanlowe Centre was redeveloped in 2015, with the project involving the construction of the Booths supermarket. This investment has resulted in a higher-quality, modern shopping centre.</li> </ul>	<ul style="list-style-type: none"> <li>Comparison provision is below UK averages in terms of both floorspace and the proportion of units, likely due to Poulton's relative proximity to Blackpool town centre, and national multiple representation in the town centre is concentrated at the lower end of the market</li> <li>Poulton can feel car-dominated and the congested traffic, on-street parking and layout can contribute to a lack of safety for both drivers and pedestrians</li> <li>There is a perception that Poulton's numerous pubs and bars can face issues with anti-social behaviour from a minority of uses at night</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>The forthcoming Bobby's Yard foodhall and retail development within the former Police Station at Market Place (planning permission reference: 23/00231/FUL) has the potential to enhance the vitality and viability of the town centre by contributing to its already strong daytime and evening food and drink offer</li> <li>A number of transport improvements to support the highways network in and around Poulton are identified in the Poulton-Le-Fylde Highway Mitigation Strategy, including the new car park permitted under reference 17/00632/OUTMAJ</li> </ul>	<ul style="list-style-type: none"> <li>Poulton is constrained by its historic character (all of the town centre is within a Conservation Area) and the surrounding residential development. As a result, there are few opportunities for large-scale redevelopment.</li> <li>Like many centres, Poulton has experienced a number of bank closures in recent years as services have moved online, and it no longer has representation from any retail banks. However, there are two building societies remaining in the centre.</li> </ul>
Conclusions	
<p>Poulton effectively fulfils the everyday convenience retail and service needs of its local residents, being anchored by Booths and Aldi and containing a good variety of independent traders. Moreover, the town centre achieves success as a daytime and evening food and drink destination.</p> <p>Comparison provision is more limited, likely reflecting the proximity of Blackpool town centre, which is a focus of higher order goods. Nonetheless, the centre supports a range of national multiples, albeit skewed towards the lower or value end of the market, and some high-quality independent retailers.</p> <p>However, Poulton's layout and traffic congestion pose some challenges, particularly for pedestrians. The busy and wide roads detract from the overall walkability of the centre and, while there are areas of the town centre that benefit from</p>	

pedestrianisation, further improvements are recommended to prioritise pedestrians and enhance safety. Anti-social behaviour associated with the evening economy uses focussed in the north of the town centre is another issue in Poulton.

Despite these challenges, we consider that Poulton is overall a healthy town centre benefitting from low vacancy rates, high footfall, an attractive and historic environment, and good public transport connections.

## 7. Population and Expenditure

### Study Area and Household Survey

- 7.1 A survey of 1,150 households was undertaken by NEMS Market Research in order to ascertain where residents go to undertake a range of shopping and leisure activities.
- 7.2 The below Table 7.1 identifies the postcode sectors which define each of the zones. A plan defining the geographic extent of the Study Area and the below zones is provided at Appendix 1.

**Table 7.1: Study Area Zones by Postcode Sector**

Survey Zone	Postcode Sectors
1	FY1 1, FY1 2, FY1 3
2	FY1 4, FY1 5, FY1 6
3	FY3 0, FY3 7, FY3 8, FY3 9
4	FY4 1, FY4 2, FY4 3
5	FY4 4, FY4 5
6	FY2 0, FY2 9
7	FY5 1, FY5 2, FY5 3
8	FY5 4, FY5 5, FY6 7, FY 6 8
9	FY7 6, FY7 7, FY7 8
10	FY6 0, FY6 9, PR3 6
11	PR3 0, PR3 1

- 7.3 The above zones were used as the basis for the NEMS household survey, which underpin the quantitative retail capacity assessment which follows at Section 6 of the report and the quantitative leisure capacity assessment at Section 8.
- 7.4 To identify the expenditure claimed by retail destinations (and the capacity which is potentially available to support additional retail and leisure development), the first step is to estimate the population and future convenience and comparison goods expenditure associated with the Study Area.

### Study Area Population

- 7.5 The population within each postcode sector and each zone at 2024 has been calculated using Experian Micromarketer G3 data (2023 estimate, which was issued in March 2025). We have confirmed with Council Officers that Experian's population projections are broadly consistent with the level of growth which is being planned for across each authority area in practice. Importantly however, any substantial growth in population associated with strategic extensions have not been accounted for and should any significant growth be planned for in the future in the local plan, then wider assessments of requirements for additional floorspace should be undertaken.
- 7.6 Table 7.2 below sets out Experian's population projections for each zone in the Study Area for reporting years 2024, 2029, 2034, 2039 and 2041.<sup>19</sup>

<sup>19</sup> The reporting years relate to five year intervals across the forthcoming plan period (working back from 2040), with an additional reporting year of 2041.

**Table 7.2: Estimated Study Area Population by Survey Zone**

Zone	2024	2029	2034	2039	2041
1	12,868	12,930	13,174	13,490	13,632
2	20,464	20,556	20,814	21,118	21,271
3	32,049	32,397	32,839	33,506	33,807
4	25,883	25,830	25,890	25,988	26,038
5	19,340	19,458	19,531	19,676	19,757
6	23,331	23,309	23,258	23,263	23,215
7	30,908	30,980	31,074	31,087	31,037
8	34,307	34,988	35,562	36,142	36,314
9	26,005	26,614	27,216	27,796	28,074
10	13,385	13,641	13,877	14,033	14,086
11	20,947	21,479	21,872	22,218	22,339
<b>Total</b>	<b>259,487</b>	<b>262,182</b>	<b>265,107</b>	<b>268,317</b>	<b>269,570</b>

Source: Table 1 of Appendix 5

- 7.7 Based on Experian’s population projections, we estimate that the Study Area population will increase from 259,487 persons at 2024 to 269,570 persons at 2041. This equates to an increase of 10,083 persons (or 3.9% over the 17-year period).

## Retail Expenditure

- 7.8 In order to calculate per capita convenience and comparison goods expenditure, we have utilised Experian Micromarketer G3 data, which provides detailed information on local consumer expenditure that takes into consideration the socio-economic characteristics of the local population. The base year for the Experian expenditure data is 2023. Our methodology takes account of the fact that some special forms of trading expenditure<sup>20</sup> is not available to support retail floorspace and then allows for increases in per capita expenditure growth on an annual basis.
- 7.9 Figure 5 of Appendix 3 of ERPBN22 provides estimates in respect of the proportion of convenience and comparison goods expenditure that will be committed through special forms of trading both now and in the future. We have ‘stripped out’ any survey responses which relate to expenditure committed via special forms of trading and have instead made an allowance derived from Experian’s recommendations (which we consider to be the most appropriate means by which to account for such expenditure).
- 7.10 We set out Experian’s expenditure growth estimates within the below Table 7.3.
- 7.11 In considering special forms of trading, many products which are ordered online are actually sourced from a store’s shelves or stockroom in practice (this is particularly the case with convenience goods). As such, expenditure committed in this manner acts to sustain shops and can be considered ‘available’ to support floorspace within the Study Area. Accordingly, in order not to overstate the influence of special forms of trading on retailers, our methodology utilises Experian’s ‘adjusted’ allowance for special forms of trading (which is provided at Figure 5 of ERPBN22). This allowance indicates that 5.1% of convenience goods expenditure and 23.7% of comparison goods expenditure is ‘lost’ to shops at base year 2024 through special forms of trading purchases.

<sup>20</sup> Identified as comprising sales via the internet, mail order, stalls and markets, door-to-door and telephone sales (i.e. all non-store sales).



7.12 Having made an allowance for special forms of trading, we then take account of projected changes in expenditure in accordance with the recommendations provided by Figure 6 of Appendix 3 of ERPBN22. Experian provides overall growth rates and ‘adjusted’ rates, which account for any additional increases in expenditure lost to special forms of trading. The annual per capita growth rates are set out below at Table 7.3.

**Table 7.3: Experian Retail Planner Briefing Note 22 Convenience and Comparison Goods Annual Per Capita Growth Rates**

Year	Convenience Goods	Convenience Goods ‘Adjusted SFT’	Comparison Goods	Comparison Goods ‘Adjusted SFT’
2022	-5.0	-5.1	8.0	6.4
2023	-2.8	-3.3	-1.7	-2.2
2024	-2.4	-1.9	-2.0	-1.7
2025	-1.3	-0.9	-0.7	0.4
2026	-1.0	-0.7	0.7	0.9
2027	-1.1	-0.6	1.0	1.3
2028	-0.9	-0.4	1.8	2.0
2029	-0.8	-0.4	2.0	2.2
2030	-0.8	-0.4	2.0	2.2
2031	-0.8	-0.4	1.9	2.2
2032	-0.8	-0.3	1.9	2.2
2033	-0.8	-0.3	1.9	2.2
2034	-0.8	-0.3	1.9	2.1
2035	-0.7	-0.3	1.9	2.1
2036	-0.7	-0.3	1.8	2.1
2037	-0.7	-0.3	1.8	2.1
2038	-0.7	-0.3	1.8	2.1
2039	-0.7	-0.3	1.8	2.1
2040	-0.7	-0.3	1.8	2.0

Source: Figure 7 of Appendix 3, Experian Retail Planner Briefing Note 22 (March 2025)

7.13 For convenience goods, Experian does not forecast any per capita expenditure growth across the entire period to 2040. The position in respect of comparison goods expenditure is more positive.

7.14 This Study utilises the most up to date Experian expenditure data and growth forecasts. However, longer term growth forecasts (beyond the next ten years) should be treated with caution given the inherent uncertainties associated with predicting the performance of the economy over time (particularly in the current economic, health and political climates). As such, assessments of this nature should be reviewed on a regular basis to ensure that forecasts over the medium and longer term reflect changing circumstances.

7.15 In this regard, we note that paragraph 90 of the NPPF requires local planning authorities to allocate sites to meet likely town centre needs ‘...looking at least ten years ahead’, which differs from the previous requirement to meet needs across the entire plan period. This change is reflective of turbulent economic conditions and the pace of change within the retail sector in recent years. By applying Experian’s recommendations in respect of special forms of trading and expenditure growth, we can produce expenditure estimates for each survey zone and the overall Study Area at 2024, 2029, 2034, 2039 and 2041.

## Convenience Goods Expenditure

- 7.16 Considering the Study Area resident population and the available per capita convenience goods expenditure, we estimate that £724.9m<sup>21</sup> of convenience goods expenditure originates within the Study Area at 2024. The below Table 7.4 indicates that available Study Area convenience goods expenditure is forecast to decrease to £696.9m at 2041.

**Table 7.4: Total Available Study Area Convenience Goods Expenditure**

2024 (£m)	2029 (£m)	2034 (£m)	2039 (£m)	2041 (£m)
724.9	703.7	700.2	698.0	696.9

Note: In 2023 Prices

- 7.17 Table 7.5 indicates that this represents a decrease of £28.0m across the Study Area between 2024 and 2041.

**Table 7.5: Growth in Available Study Area Convenience Goods Expenditure**

Growth 2024-29 (£m)	Growth 2024-34 (£m)	Growth 2024-2039 (£m)	Growth 2024-2041 (£m)
-21.3	-24.8	-27.0	-28.0

Note: In 2023 Prices

- 7.18 We have assumed that 75% of available convenience goods expenditure would take the form of main food shopping and that 25% would take the form of top-up shopping (which relates to smaller purchases often made using a basket rather than a shopping trolley).<sup>22</sup>
- 7.19 By applying this ratio, we estimate that main food shopping trips account for £543.7m of Study Area convenience goods expenditure at 2024, and top-up shopping trips account for £181.2m.

## Comparison Goods Expenditure

- 7.20 For comparison goods, Table 7.6 sets out our estimate that the resident population of the Study Area will generate £696.7m of comparison goods expenditure at 2024. Available comparison goods expenditure is then forecast to increase to £960.2m at 2041.

**Table 7.6: Total Available Study Area Comparison Goods Expenditure**

2024 (£m)	2029 (£m)	2034 (£m)	2039 (£m)	2041 (£m)
696.7	729.5	816.8	917.0	960.2

Note: In 2023 Prices

- 7.21 The identified increase in comparison goods expenditure growth is substantial, but it represents a level of annual growth that is more circumspect than that which has been achieved in the past. This is due to both a reduction in the overall level of growth when compared to that achieved in the early part of this millennium, and as a result of further forecast increases in expenditure committed via special forms of trading (most obviously, internet shopping).
- 7.22 As the below Table 7.7 identifies, our assessment estimates that there will be an increase of £263.5m (equating to 37.8%) in respect of Study Area comparison goods expenditure between 2024 and 2041. The increase in

<sup>21</sup> In 2023 Prices, as is every subsequent monetary reference.

<sup>22</sup> This is a standard split applied in undertaking this exercise.

comparison expenditure is associated with the forecasted growth in per capita expenditure across the local plan period.

**Table 7.7: Growth in Available Study Area Comparison Goods Expenditure**

Growth 2024-29 (£m)	Growth 2024-34 (£m)	Growth 2024-2039 (£m)	Growth 2024-2041 (£m)
32.8	120.1	220.3	263.5

Note: In 2023 Prices

- 7.23 We sub-divide comparison goods expenditure into eight categories, these being: ‘DIY’, ‘Electrical’ and ‘Furniture’ (collectively referred to as bulky goods); and ‘Clothing and Footwear’, ‘Books, CDs and DVDs’, ‘Health, Beauty and Chemist Goods’, ‘Small Household Goods’, and ‘Toys, Games, Bicycles and Recreational Goods’ (collectively referred to as non-bulky goods). The proportion of expenditure directed to each sub-category is estimated by Experian on a zonal basis. Experian’s estimates are reflected in the detailed expenditure tables set out at Table 7b of Appendix 5 of this report.
- 7.24 In considering expenditure growth, it should be noted that not all growth arising within the Study Area is available to support additional floorspace in both Blackpool and Wyre authority areas. Instead, account needs to be taken of:
- the market share of expenditure secured by retailers within the two authority areas (and the fact that many needs are successfully met outside the two authority areas);
  - the claim made by existing retailers on expenditure growth (the future efficiency of retail floorspace); and
  - the expenditure that will be claimed by committed retail developments.
- 7.25 These issues are addressed in the assessment of retail capacity provided in Section 8 of this report.

## 8. Assessment of Retail Capacity

- 8.1 Our retail capacity tables set out our step-by-step approach to estimating the expenditure surplus which is available to support additional retail floorspace and are provided at Appendix 5. A summary of our methodology, together with our findings, is provided below.

### General Approach to Estimating Quantitative Capacity

- 8.2 Retail capacity modelling follows the basic principle that:

**Available Expenditure minus Expected Turnover of Existing and Committed Floorspace equals Expenditure Surplus or Deficit.**

- 8.3 An identified quantitative expenditure surplus indicates that there is capacity to support additional retail floorspace. We summarise the key considerations relating to each component of the equation below.

### Methodology

- 8.4 We turn first to a description of the methodology we have employed in assessing quantitative need in both the comparison and convenience goods sectors in the period up to 2041. It is important to recognise, however, that the effects of expenditure growth over time become exponential. Thus, in looking to the period beyond 2034, the Council should adopt a plan, monitor and manage approach, so as to ensure that the forecast floorspace requirements are kept in line with changes in expenditure and changing methods of retailing.
- 8.5 There is no detailed guidance as to how to assess the quantitative need for retail development in the NPPF, or in the PPG. As a consequence, we have applied an eight step approach which has been tested at Examination
- 8.6 The eight broad steps to calculating the quantitative need are as follows:
- i) The first step is to establish the appropriate overall retail catchment area for the hierarchy of centres in Blackpool and Wyre, which is shown at Appendix 1. This catchment area covers the whole of the administrative areas of Blackpool and Wyre, together with parts of the surrounding administrative areas.
  - ii) The second step is to assess the existing level of population and the existing volume of retail expenditure of those who reside within the overall catchment area.
  - iii) The third step is to establish where the retail expenditure of residents of the overall catchment area is currently spent, through the use of an empirical telephone survey of households and thereby establish the proportion of the retail expenditure of catchment area residents which is currently retained by town centres, retail parks and freestanding stores located within the overall catchment area – that is the aggregate retention rate within the two authority areas.
  - iv) The fourth step is to apply forecasts of population change and per capita expenditure change, so as to establish the overall level of projected growth in expenditure for residents of the overall catchment area, and an assessment of growth in retained expenditure, based, initially, on a constant retention scenario.
  - v) The fifth step is to make an allowance for growth in inflows of expenditure into the catchment area from those who reside outside in the catchment area (i.e. those who live outside of the defined Study Area but which choose retail destinations in the Study Area to meet their shopping needs). This can be achieved through the analysis of retail studies of adjacent authority areas and the analysis of available tourism data. We explain this in further detail below.

- vi) The sixth step is to make an allowance for under-trading, or over-trading of the larger existing stores in the base year, but only if this is justified on the basis of the clear empirical evidence.
- vii) The growth in retained expenditure (step iv), is added to the growth in inflows (step v), and an allowance for under / over-trading (step vi), so as to derive an initial expenditure surplus. Thus, the seventh step is to make allowance for 'claims' on the initial expenditure surplus, as a result of:
  - Floorspace Efficiency Change for Existing Retailers (growth over time in turnover per sq. m sales area).
  - Growth Over Time in Special Forms Of Trading (SFT), which we derive from the final two columns of Figure 5 of Experian's Retail Planner Briefing Note 22 of March 2025.
  - Planning Commitments, for which information has been provided by Blackpool and Wyre Councils.
- viii) The culmination of steps i) to vii) is the calculation of the residual expenditure pot which is potentially available for new retail floorspace, under a constant retention assumption. Thus, the final step, where appropriate, is to develop alternative scenarios for calculating growth in residual expenditure, based on:
  - increases or decreases in the projected retention level; and
  - sensitivity testing of key assumptions, such as projected population change.

8.7 As a consequence, we adopt the position for comparison goods floorspace that it is trading 'at equilibrium' at base year 2024 (i.e. our survey-derived turnover estimate effectively acts as benchmark). This is a standard industry approach.

### Inflow

8.8 Tourist spending has been estimated using data from the Marketing Lancashire Scarborough Tourism Economic Activity Monitor (STEAM) Tourism Economic Impacts Report for 2023 and the Blackpool STEAM Final Trend Report for 2017 to 2019, prepared by Global Tourism Solutions (UK) Ltd. The former provides estimates of tourism spend in Lancashire, and specifically Blackpool at 2023 and represents the most recent available data.

8.9 The STEAM report estimates that Blackpool attracted £1,978.8m<sup>23</sup> of direct and indirect visitor and tourism business expenditure in 2023.<sup>24</sup> This expenditure was divided among the following sectors:

- Accommodation
- Food & Drink
- Recreation
- Shopping
- Transport
- Direct Revenue
- VAT

8.10 The 2023 STEAM report does not provide an estimate of what proportion of the total tourism expenditure was spent on 'shopping' (i.e. on convenience and comparison goods) by visitors to Blackpool in 2023. The most recent data for Blackpool in respect of how this spending is divided among the categories listed above are set out in the STEAM Final Trend Report 2017 to 2019. This report shows that, in 2019, the 'shopping' category accounted for

<sup>23</sup> In 2023 prices.

<sup>24</sup> The 2023 STEAM figures reported have been adjusted from inflation. The rate of inflation in 2023 is estimated at 13.4%, based on the Retail Price Index (RPI). This rate is higher than the Consumer Price Index (CPI), reflecting that many visitor expenditure items, such as food and fuel, experienced higher inflation levels than the CPI.

21.7% of Blackpool's direct and indirect tourism expenditure and the 'food and drink' category accounted for 18.6%.

- 8.11 Given the lack of significant store openings in the Blackpool authority area since 2019, we consider that this proportion remains a reasonable basis for estimating current levels of tourism expenditure directed to shopping. As such, we estimate that 21.7% of the direct and indirect visitor and tourism business expenditure that flowed in Blackpool in 2023, equating to £429.3m, was used to purchase goods within Blackpool's shops (comparison spend).

**Table 8.1a: Tourism Expenditure Distributed to the Shopping Sector in Blackpool in 2023**

Total Tourism Expenditure in Blackpool in 2023 (£m)	Proportion of Tourism Expenditure Distributed to 'Shopping' Sector in Blackpool in 2023 (%)	Tourism Expenditure Distributed to 'Shopping' Sector in Blackpool in 2023 (£m)	Tourism Expenditure Distributed to Comparison Goods in Blackpool in 2023 (£m)
1,978.8	21.7%	429.3	429.3

Notes: Estimates derived from the Lancashire STEAM Tourism Economic Impacts Report for 2023 and the Blackpool STEAM Final Trend Report for 2017 to 2019; in 2023 prices.

- 8.12 In addition to the above, the STEAM Final Trend Report 2017 to 2019 report also showed that the 'food and drink' category accounted for 18.6% of the direct and indirect visitor and tourism business expenditure. Again, we consider this to be an accurate reflection of the split of tourism inflow, and has again been adopted for the purposes of this Study. As such, we estimate that 18.6% of the direct and indirect visitor and tourism business expenditure that flowed in Blackpool in 2023, equating to £429.3m, was used to purchase goods within Blackpool's shops (comparison spend).
- 8.13 As was the case in the 2018 Study, it is important to make a deduction for spending on eating and drinking in restaurants, cafes and other venues as part of the overarching 'food and drink' category.
- 8.14 To estimate the visitor spending on groceries and other food and snacks bought in shops only, we then make a deduction for spending on eating and drinking at restaurants, cafes and other venues based on data sourced from VisitBritain. VisitBritain<sup>25</sup> provides further detail on the breakdown of domestic tourism expenditure at a national level and identifies that 33% of total day visitor expenditure across Great Britain is spent on eating and drinking, of which 77% is spent on eating/drinking out in cafes and restaurants etc. and 23% is spent in food bought in shops/takeaways. We have therefore applied this to the total 'food and drink' expenditure figure in Table 8.1b below to calculate the level of inflow to help support convenience goods retailers in the authority area.

**Table 8.1b: Tourism Expenditure Distributed to the Food and Drink Sector in Blackpool in 2023**

Total Tourism Expenditure in Blackpool in 2023 (£m)	Proportion of Tourism Expenditure Distributed to 'Food and Drink' Sector in Blackpool in 2023 (%)	Tourism Expenditure Distributed to 'Food and Drink' Sector in Blackpool in 2023 (£m)	Tourism Expenditure Distributed to Convenience Goods in Blackpool in 2023 (£m)
1,978.8	18.6%	368.1	84.7

<sup>25</sup> [Great Britain domestic day trips | VisitBritain.org](https://www.visitbritain.org)

- 8.15 In practice, we allow for a slightly higher level of convenience and comparison goods inflow to Blackpool as we believe that some expenditure is attracted from residents of the Fylde district who live outside our defined Study Area, but which would not be considered as tourism expenditure by STEAM.<sup>26</sup>

### Surplus/Deficit

- 8.16 The expenditure surplus (or deficit) is calculated by subtracting the turnover of existing and committed floorspace from the available expenditure directed to retailers within each of the authority areas. A surplus figure effectively represents an under-provision of retail facilities within the authority area (and may indicate that additional floorspace could be supported), whereas a deficit would suggest a quantitative over-provision of retail floorspace.
- 8.17 Although a surplus is presented as a monetary figure, it can be converted to a floorspace requirement through the application of an appropriate sales density. In this regard, the floorspace requirement will vary according to operator and the likely sales density they could achieve. For example, in the case of comparison goods, non-bulky goods retailers tend to achieve higher sales densities than bulky goods retailers. However, within the bulky goods sector itself there is significant variation, with electrical retailers typically having higher sales densities than DIY or furniture retailers.
- 8.18 The turnover of destinations is generally considered with reference to retailers' net sales areas and all of the following floorspace figures are presented on this basis.
- 8.19 Our methodology in calculating comparison goods capacity necessarily departs from that used in considering convenience goods needs. This is because it is difficult to accurately estimate a benchmark turnover for comparison goods floorspace due to the large number of operators and the variation in the trading performance of floorspace, depending on its location, character, and the nature of the catchment. As a consequence, we adopt the position for comparison goods floorspace that it is trading 'at equilibrium' at base year 2024 (i.e. our survey-derived turnover estimate effectively acts as benchmark).

### Future Quantitative Convenience Goods Capacity

- 8.20 In identifying the requirement for additional convenience goods floorspace, the estimated turnover of the existing collective provision (with reference to the shopping patterns established by the household survey) is compared to its benchmark turnover (calculated with reference to company average sales densities and the net convenience goods sales areas of individual stores). The identified benchmark turnover changes across future reporting years to account for Experian's forecasts in respect of the future sales efficiency of convenience goods floorspace.
- 8.21 We begin by providing the convenience capacity figures for the Blackpool authority area and then follow this by providing the corresponding figures for the Wyre authority area.

#### Blackpool Convenience Goods Capacity

- 8.22 As Table 8.2 demonstrates, convenience goods floorspace across the authority area has a survey-derived turnover of £316.5m and an expected benchmark turnover of £386.7m. Once inflow is considered, a convenience expenditure surplus of £39.5m is identified at 2024, which decreases to £27.4m by 2029. By 2041, the surplus in expenditure decreases slightly again to £27.2m.

---

<sup>26</sup> STEAM's definition of tourism expenditure excludes regular shopping trips within neighbouring authorities.

**Table 8.2: Quantitative Capacity for Additional Convenience Goods Floorspace in the Blackpool Authority Area**

Year	Benchmark Turnover (£m)	Available Expenditure (£m)	Inflow (£m)	Surplus Expenditure (£m)
2024	386.7	316.5	109.7	39.5
2029	386.3	307.2	106.5	27.4
2034	385.2	305.7	106.0	26.5
2039	383.3	304.7	105.6	27.1
2041	382.5	304.3	105.5	27.2

Source: Table 6a of Appendix 5

Notes: Assumes constant market share (43.7%) of Study Area expenditure claimed by facilities within Blackpool authority area; allows for changes in benchmark turnover sales efficiency in accordance with Figure 4b of Experian Retail Planner Briefing Note 22; in 2023 prices.

**8.23** We have identified one convenience commitment (extant consent) within the Blackpool authority area which needs to be taken account of in calculating the capacity, being the extant permission at Blackpool Retail Park. As such, Table 8.3 below then provides the residual capacity and floorspace requirement taking account of the turnover of the single identified commitment within the authority area. The allocation for a new foodstore within the adopted local plan within Blackpool town centre has not been accounted for within the quantitative capacity assessment as it is not subject to a current or extant planning application. We do however provide further commentary on this in respect of the qualitative discussions below.

**8.24** Table 8.3 identifies a positive monetary surplus across the entirety of the plan period to 2041 when commitments have been considered. In practice, our assessment suggests that there will be an effective quantitative undersupply of floorspace in Blackpool (equating to between 1,600 sq.m and 2,100 sq.m of convenience goods floorspace at 2041).

**Table 8.3: Quantitative Capacity for Convenience Goods Floorspace in the Blackpool Authority Area after Commitments**

Year	Surplus (£m)	Commitments (£m)	Residual (£m)	Floorspace Requirement	
				Minimum (sq.m)	Maximum (sq.m)
2024	39.5	8.9	30.6	2,700	3,500
2029	27.4	8.9	18.4	1,600	2,100
2034	26.5	8.9	17.6	1,600	2,000
2039	27.1	8.8	18.2	1,600	2,100
2041	27.2	8.8	18.4	1,600	2,100

Source: Table 6d of Appendix 5

Notes: Assumes constant market share (43.7%) of Study Area expenditure claimed by facilities within the authority area; allows for changes in benchmark turnover sales efficiency in accordance with Figure 4a of Experian Retail Planner Briefing Note 22; in 2023 Prices

### Wyre Convenience Goods Capacity

**8.25** As Table 8.4 demonstrates, convenience goods floorspace across the authority area has a survey-derived turnover of £345.4m and an expected benchmark turnover of £265.8m. Once inflow is considered, a convenience expenditure surplus of £86.5m is identified at 2024, which decreases to £76.4m by 2029. By 2041, the surplus in expenditure decreases slightly to £75.8m.



**Table 8.4: Quantitative Capacity for Additional Convenience Goods Floorspace in the Wyre Authority Area**

Year	Benchmark Turnover (£m)	Available Expenditure (£m)	Inflow (£m)	Surplus Expenditure (£m)
2024	265.8	345.4	6.9	86.5
2029	265.6	335.3	6.7	76.4
2034	264.8	333.6	6.7	75.5
2039	263.5	332.6	6.7	75.8
2041	262.9	332.1	6.6	75.8

Source: Table 6a of Appendix 5

Notes: Assumes constant market share (47.9%) of Study Area expenditure claimed by facilities within Wyre authority area; allows for changes in benchmark turnover sales efficiency in accordance with Figure 4b of Experian Retail Planner Briefing Note 22; in 2023 Prices.

- 8.26 The Council has provided details of a series of small scale convenience commitments within the authority area which need to be taken account of in calculating the capacity. These commitments are detailed within the quantitative capacity tables.
- 8.27 As such, Table 8.5 below then provides the residual capacity and floorspace requirement, taking account of the commitments within the Wyre authority area for new convenience floorspace.
- 8.28 Table 8.5 identifies a positive monetary surplus across the entirety of the plan period to 2041. In practice, our assessment suggests that there will be an effective quantitative undersupply of floorspace (equating to between 4,500 sq.m and 5,800 sq.m of convenience goods floorspace at 2041).

**Table 8.5: Quantitative Capacity for Convenience Goods Floorspace in the Wyre Authority Area after Commitments**

Year	Surplus (£m)	Commitments (£m)	Residual (£m)	Floorspace Requirement	
				Minimum (sq.m)	Maximum (sq.m)
2024	86.5	25.3	61.2	5,400	6,900
2029	76.4	25.3	51.1	4,500	5,800
2034	75.5	25.2	50.3	4,500	5,700
2039	75.8	25.1	50.7	4,500	5,800
2041	75.8	25.0	50.8	4,500	5,800

Source: Table 6d of Appendix 5

Notes: Assumes constant market share (47.8%) of Study Area expenditure claimed by facilities within Wyre authority area; allows for changes in benchmark turnover sales efficiency in accordance with Figure 4a of Experian Retail Planner Briefing Note 22

## Future Quantitative Comparison Goods Capacity

- 8.29 For comparison goods, we assume that floorspace is 'in equilibrium' at the start of an assessment (i.e. its turnover is in line with expectations, and that the sector has evolved to meet local/regional needs).

## Blackpool Comparison Capacity

- 8.30 As identified by the below Table 8.6, our assessment estimates that the comparison goods turnover of the authority area is £384.9m, or £814.3m after account is taken of inflow.
- 8.31 Experian anticipates that improvements in the sales efficiency of existing comparison goods floorspace will outstrip per capita comparison goods expenditure growth in the very short term.

8.32 As such, a deficit in expenditure of -£36.6m is identified at 2029. We anticipate that the identified expenditure deficit will increase to -£46.0m at 2041.

**Table 8.6: Quantitative Capacity for Comparison Goods Floorspace in the Blackpool Authority Area**

Year	Benchmark Turnover (£m)	Available Expenditure (£m)	Inflow (£m)	Surplus Expenditure (£m)
2024	814.3	384.9	429.4	0.0
2029	889.3	403.0	449.6	-36.6
2034	996.4	451.2	503.4	-41.7
2039	1,116.3	506.6	565.2	-44.6
2042	1,168.3	530.5	591.8	-46.0

Source: Table 26a of Appendix 5

Notes: Assumes constant market share (55.2%) of Study Area expenditure claimed by facilities in the authority area; allows for changes in benchmark turnover sales efficiency in accordance with Figure 4b of Experian Retail Planner Briefing Note 22; in 2023 Prices

8.33 Due to the single extant comparison commitment identified within the Blackpool authority area at Blackpool Retail Park, as Table 8.7 below shows, the assessment identifies an oversupply of comparison floorspace in the early part of the plan period. This oversupply then continues throughout the plan period, with no comparison capacity identified within the assessment.

**Table 8.7: Quantitative Capacity for Comparison Goods Floorspace in the Blackpool Authority Area**

Year	Surplus (£m)	Commitments (£m)	Residual (£m)	Floorspace Requirement	
				Minimum (sq.m)	Maximum (sq.m)
2024	0.0	3.7	-3.7	-600	-1,100
2029	-36.6	4.1	-40.7	-6,200	-10,600
2034	-41.7	4.5	-46.2	-6,300	-10,800
2039	-44.6	5.1	-49.7	-6,000	-10,300
2041	-46.0	5.5	-51.5	-5,800	-10,000

Source: Table 26d of Appendix 5

Notes: Assumes constant market share (55.2%) of Study Area expenditure claimed by facilities in the authority area; allows for changes in benchmark turnover sales efficiency in accordance with Table 4a of Experian Retail Planner Briefing Note 22; minimum floorspace requirement based on an assumed sales density of £6,000 per sq.m at 2024; maximum floorspace requirement based on an assumed sales density of £3,500 per sq.m at 2024; in 2023 Prices

### Wyre Comparison Capacity

8.34 As identified by the below Table 8.8, our assessment estimates that the comparison goods turnover of the authority area is £217.3m, or £228.2m after account is taken of inflow.

8.35 Experian anticipates that improvements in the sales efficiency of existing comparison goods floorspace will outstrip per capita comparison goods expenditure growth in the very short term. The capacity assessment does not identify any capacity for additional comparison floorspace within the Wyre authority area across the plan period.

**Table 8.8: Quantitative Capacity for Comparison Goods Floorspace in the Wyre Authority Area**

Year	Benchmark Turnover (£m)	Available Expenditure (£m)	Inflow (£m)	Surplus Expenditure (£m)
2024	228.2	217.3	10.9	0.0
2029	249.2	227.6	11.4	-10.3
2034	279.2	254.8	12.7	-11.7
2039	312.9	286.1	14.3	-12.5
2042	327.4	299.5	15.0	-12.9

Source: Table 26a of Appendix 5

Notes: Assumes constant market share (31.2%) of Study Area expenditure claimed by facilities in the authority area; allows for changes in benchmark turnover sales efficiency in accordance with Figure 4b of Experian Retail Planner Briefing Note 22; in 2023 Prices

- 8.36 Table 8.9 below identifies an oversupply of comparison floorspace across the plan period within the Wyre authority area.

**Table 8.9: Quantitative Capacity for Comparison Goods Floorspace in the Wyre Authority Area**

Year	Surplus (£m)	Commitments (£m)	Residual (£m)	Floorspace Requirement	
				Minimum (sq.m)	Maximum (sq.m)
2024	0.0	0.0	0.0	0	0
2029	-10.3	0.0	-10.3	-1,600	-2,700
2034	-11.7	0.0	-11.7	-1,600	-2,700
2039	-12.5	0.0	-12.5	-1,500	-2,600
2041	-12.9	0.0	-12.9	-1,500	-2,500

Source: Table 26d of Appendix 5

Notes: Assumes constant market share (50.4%) of Study Area expenditure claimed by facilities in the authority area; allows for changes in benchmark turnover sales efficiency in accordance with Table 4a of Experian Retail Planner Briefing Note 22; minimum floorspace requirement based on an assumed sales density of £6,000 per sq.m at 2024; maximum floorspace requirement based on an assumed sales density of £3,500 per sq.m at 2024; in 2023 Prices

## Convenience and Comparison Requirements

- 8.37 In assessing the potential qualitative need for additional retail provision, whilst this is a more subjective matter, there are important factors to consider when reviewing the existing provision within each of the respective administrative areas. Considerations such as ‘gaps’ in existing provision, ensuring that communities have easy access to retail facilities and that there are a range of operators to provide choice to residents, along with location specific needs such as higher levels of deprivation, all need to be taken account of when assessing the qualitative need.
- 8.38 In order to consider the potential qualitative requirements within both of the authority areas, we have produced a convenience foodstore plan which provides a spatial overview of where the principal foodstores (with a net convenience sales floorspace over 500 sq.m) are located within both Wyre and Blackpool. A copy of the plan is included at Appendix 8, and the findings are discussed in more detail below as part of the qualitative analysis. It is worth noting that there are a range of smaller convenience facilities located across both authority areas, which provide for a day-to-day local offer, such as purchasing a loaf of bread or pint of milk, and other ‘basket’ shops. However, our focus below is on the larger convenience provision and whether residents have good access to facilities which meet the more substantial shopping needs. Another relevant consideration in this regard is whether convenience facilities within each adjacent authority area also meet the needs of the other authority area (i.e. if Wyre’s facilities are also at least in part meeting the needs of some of Blackpool’s residents).

8.39 As set out in detail above, we have identified a quantitative capacity for additional convenience floorspace within both the Blackpool and Wyre authority areas. However, we have not identified any capacity for additional comparison floorspace within either of the authority areas.

8.40 Taking the above into account, and the findings of the previous studies (and associated planning policy recommendations), we provide our consideration of the quantitative and qualitative need for additional convenience and comparison goods retailing within each of the authority areas.

#### Convenience Requirements – Blackpool Authority Area

8.41 Reviewing the convenience spatial plan, it is clear overall that the Blackpool authority area is generally well provided for in terms of the scale and offer of foodstores. Indeed, Blackpool's foodstores are also in part serving Wyre's residents in the northern part of the borough. The positioning, types of operators and scale of these operators is well provided for across the authority area on the whole.

8.42 Looking specifically at the convenience turnovers in Zones 4 and 6, although there is a level of overtrading identified, when taken on a zonal basis, this is not considered to be at a level which would support a material quantum of additional floorspace on a solely quantitative basis.

8.43 If we look at individual stores across the authority area and when consideration is given to the level of overtrading of stores, alongside matters such as ensuring there is appropriate consumer choice and shopping destinations located in sustainable locations, the picture is slightly different.

8.44 The 2018 Blackpool Study identified a qualitative need for an additional convenience operator, within the discount end of the market within Blackpool town centre and specifically Zones 1 and 2 of the Study. This recommendation was made on the basis of:

1. The shopping patterns in 2018 demonstrated that only a low proportion of expenditure generated by residents in Zones 1 and 2 was being retained within their respective zone. Instead, residents were choosing to undertake their main food shop in Zones 4 and 5.
2. Shoppers seeking a more affordable choice of convenience destination to meet their main food shopping demands were prepared to travel to fulfil this requirement. Beyond the Sainsbury's Superstore within the town centre, the alternative convenience provision in the locality was focused either on specialist retailing or the smaller format operators. In this regard, consideration was given specifically to the qualitative demand for an operator such as Aldi or Lidl within the town centre.

8.45 On the basis of the above, the Council subsequently allocated a site within the town centre in the Blackpool Local Plan Part 2. In this regard, Policy MUSA1 allocates the land at Church Street (former Syndicate site) for a mixed-use development, including a foodstore (up to 2,500 sq.m) and a multistorey car park. It is understood that no proposal has yet been progressed on the site in accordance with the allocation. In coming to a conclusion on the potential qualitative need for a new foodstore, it is important that this existing allocation is given due consideration. We return to this later in this section.

8.46 Looking at the current picture across the authority area and focusing on Zones 1 to 6 in particular, it is clear that for each zone except Zones 4 and 6, the convenience operators when considered together on a zonal basis, are performing below their benchmark averages. It follows that for the purposes of the benchmark turnover assessment, inflow of expenditure from visitors outside of the authority area is not taken into account. Therefore, the level of undertrading of some of the stores (particularly those in Blackpool town centre which will be most

frequented by visitors to the authority area) may not be as substantial as that which is presented in the quantitative tables. In this regard, it is considered likely that the majority of inflow into Blackpool will be spent at retailers within and surrounding the town centre, for both convenience and comparison retailing. Therefore, any consideration for additional floorspace should in practice be focused to this key tourist area.

- 8.47 In this regard, the larger superstores, comprising the Sainsbury's at Talbot Gateway (Zone 1), the Asda on Cherry Tree Road (Zone 5) and the Tesco at Clifton Retail Park (Zone 5) are all identified to be undertrading, with the Sainsbury's in Blackpool town centre identified to be performing considerably below the national company benchmark average (although we do note that a proportion of the inflow identified will likely be directed to this store). The same position was also established as part of the 2018 Study, insofar as the same stores were identified as undertrading at that point too.
- 8.48 It is important to note that there are a number of stores, principally discount retailers (Aldi and Lidl stores) which are trading above company benchmark average, indicating a continued strong demand for these types of operators from residents within Blackpool, and beyond. One such retailer is the relatively new Aldi at Holyoake Avenue, (Zone 6) which is a new entrant into the market subsequent to the previous Study and which draws expenditure from residents in Zone 1 in particular. Furthermore, the Lidl at Bloomfield Road (Zone 2) also draws expenditure from residents in Zone 2. It is considered that the new Aldi at Holyoake Avenue will have to some degree, met the qualitative need identified in the 2018 Study.
- 8.49 However, the zonal retention level of main food convenience expenditure of residents in Zones 1 to 3 is still relatively low, with the lowest identified in Zone 2. As discussed above, key convenience operators include the Sainsbury's at Talbot Gateway, the Lidl at Bloomfield Road and the Lidl at Devonshire Road. Although in each of these zones there are main food shopping facilities, it could be argued that there is a general lack of consumer choice, which is why shoppers are traveling further to meet their needs.
- 8.50 Given the above, it is therefore of relevance to reconsider the potential qualitative need for additional convenience floorspace within these Zones (1-3) and whether the existing provision – although not located in the same corresponding zone – still represents a sustainable shopping option for residents.
- 8.51 In this instance, alongside the Sainsbury's at Talbot Gateway, residents of Zone 1 are choosing the Aldi stores at Holyoake Avenue and Blackpool Retail Park to meet their main food shopping needs, and alongside the Lidl at Bloomfield Road. In addition, residents in Zone 2 are choosing the Aldi at Oxford Square, the Asda at Cherry Tree Road and the Tesco at Clifton Retail Park all in Zone 5 to meet their main food shopping needs. As such, it is clear that residents are still choosing to travel to these stores to meet their needs. Although for some, this will not equate to unsustainable shopping patterns, it does in some cases indicate that the overarching provision within easy access of those living and visiting (staying) in the town centre may be limited.
- 8.52 Again, taking account of the fact that the quantitative need arises solely due to level of inflow included in the assessment, and this demand being principally within the town centre, it is relevant to consider the potential opportunities to improve the provision in the town centre, as was the case in 2018. As noted, any need that may arise would need to be suitably located to meet the requirements of those visiting the town centre from outside of the area. The quantitative need identified across the plan period is for one medium-sized foodstore, or a series of smaller stores equating to the same level of floorspace. On this basis, should an appropriate site come forward in the town centre for additional convenience floorspace, this would meet that identified qualitative and quantitative need (i.e. the need generated by the level of tourism inflow).

- 8.53 We are not aware of any additional sites within the town centre which could meet this need, beyond that which is allocated at the former Syndicate Site. As such, should a site become available within the town centre or the wider resort core, there could be a case to be made that this could meet that identified deficiency. Whether this is on the currently allocated site, or an alternative site, will be market driven.
- 8.54 Given the above, it is recommended that should a suitable site come forward within the town centre or wider resort core over the plan period, then the suitability of that site to accommodate an additional convenience store to complement the existing convenience offer should be explored. It may be that the existing allocated site continues to be the most appropriate site, or that an alternative comes forward as part of the wider town centre redevelopment schemes over the coming years.
- 8.55 Should proposals come forward outside of this area for additional floorspace, they should be assessed on their own merits against the relevant retail policy tests. This will ensure that should a town centre or edge of centre site be available, then proposals will be directed to these sites as part of the sequential test.

### Convenience Requirements – Wyre Authority Area

- 8.56 As noted above, there is an identified quantitative requirement for additional convenience floorspace within the Wyre authority area. The quantitative capacity identified is due to the number of stores over trading in the authority area. This can be seen in particular in respect of the Aldi and Morrisons stores in Cleveleys (Zone 7), the Aldi and to a lesser extent the Lidl in Poulton, the Aldi and Asda stores in Fleetwood and the Aldi store in Garstang.
- 8.57 Overall when taken together, the stores in Zones 7, 8, 9 and 11 are all overtrading, indicating that there is perhaps both a quantitative and qualitative demand for additional convenience operator representation within Wyre but specifically within these geographical areas of the authority area. We discuss each area in turn below.
- 8.58 Looking firstly at Thornton-Cleveleys, there is a clear level of overtrading identified, where not only do the discounters (Aldi and Lidl) overtrade, but also the Morrisons foodstore, which is identified as performing strongly against its company benchmark average. However, the level of offer in terms of the nature of operators and size of stores within Zone 7 as a whole (and the offer in the adjacent zones such as 6 and 8) provide for good access overall for residents in this part of the authority area. Furthermore, no sites have been identified within Cleveleys centre and in any event, given the proximate stores to the south within the Blackpool authority area but which still very much provide additional consumer choice for residents in Wyre, we do not recommend allocating any additional sites for convenience provision and that instead, should any proposals come forward, these are assessed on their own merits against the relevant retail policy tests.
- 8.59 Looking at Fleetwood, again there is a clear quantitative and qualitative requirement to improve the convenience offer within the wider settlement area, with the Asda and Aldi stores (both situated in 'in centre' locations in planning policy terms) performing well and the offer in terms of store fascia being relatively limited. If it were the case that an appropriate site was to come forward within the centre, the potential impact on the existing convenience provision within Fleetwood would need to be considered, including on the Asda store. In any event, potential site opportunities for additional convenience provision have been discussed with the local authority, and no suitable town centre sites have been identified as part of this process. As such, we again do not recommend that a site is allocated as part of the local plan but that any proposals are assessed against the relevant retail policy tests and in particular, ensuring that they benefit Fleetwood town centre.
- 8.60 It is considered that although overtrading of the existing stores within Garstang has been identified in the Study, the overarching offer (including the number of stores and types of retailers) within Garstang is suitable for the catchment, and that there is no immediate requirement to grow the convenience offer or representation. Again,

should proposals come forward, then these should be assessed on a case by case basis accordance with adopted planning policy, which seeks to protect the defined centre.

- 8.61 Overall, it is considered that although there is a quantitative capacity identified, the provision of foodstores both within the Wyre authority area, when taken together with the offer in Blackpool, broadly meets the needs of the residents within the authority area. As such, we do not recommend allocating any sites for additional floorspace within the authority area and that any proposals are assessed on their own merits against the relevant retail policy tests. In particular, specific emphasis should be placed on the need to help improve the vitality and viability of Fleetwood town centre should additional proposals for convenience floorspace come forward in the northern part of the authority area.

### Comparison Requirements – Blackpool Zones

- 8.62 The comparison retailing market is more volatile than the convenience market, with both the level of online spending being higher and the propensity of shopping trips to purchase comparison goods generally being less frequent. Residents are often willing to travel greater distances to meet their comparison shopping needs, which can have implications on operator requirements and demands.
- 8.63 The quantitative assessment provided above indicates no capacity across the plan period. Importantly, it is considered that any comparison capacity would be absorbed through the reoccupation of suitable vacant floorspace within defined centres
- 8.64 The market share analysis indicates that there is still a draw to the out of centre facilities in terms of residents' available comparison expenditure, which is to the most part, a detriment to Blackpool town centre and to a lesser extent, the smaller centres within the authority area.
- 8.65 However, Blackpool town centre and specifically Houndshell Shopping Centre, is still a key draw for residents both within the borough and further afield, and which houses a range of comparison operators meeting a variety of needs. The operators range from relatively high level clothing and footwear operators such as Frasers and Flannels, to the more affordable operators such as Primark and New Look. The shopping centre also includes a range of health and beauty operators, telecommunication operators, shoe shops and jewellery shops. Although the comparison offer within the town centre has contracted since the previous study, and there is a real concentration of retailing focused around Houndshell and the surrounding adjacent streets, there is not an immediate requirement for additional floorspace or operators within the centre.
- 8.66 Given the above, and taking account of the commercial climate, we do not conclude that there is a qualitative demand for additional comparison floorspace within Blackpool town centre. As such, we do not recommend that sites are specifically allocated for additional comparison floorspace within or adjacent to the town centre.
- 8.67 Looking at the smaller centres within the authority area, these are broadly meeting local and day-to-day needs, including from a comparison retailing perspective. Although the centres vary in terms of the qualitative offer and the types of operators range throughout the authority area, we consider that demand for additional facilities within these centres will not be considerable. As such, we again do not recommend that sites are allocated for additional comparison floorspace within or adjacent to the district centres within the borough.



### Comparison Requirements – Wyre Zones

- 8.68 It is clear that Blackpool town centre still performs an important role in meeting the qualitative needs of Wyre's residents, but that centres such as Cleveleys and the out of centre facility at Affinity are also very important in retaining expenditure and providing an offer which meets some of the demand of residents.
- 8.69 The 2011 Study identified that both Fleetwood and Cleveleys serve as important comparison goods destinations for Wyre residents, which continues to be the case. The requirement to improve the quality and quantity of comparison goods retailing in these centres was noted as an important recommendation, in order to draw expenditure back into the authority area. Whilst this would still be recommended, there has been an overarching improvement in terms of the offer of comparison retailing at Affinity, which is certainly going some way to meeting residents' needs. Although not located within the defined town centre boundary of Fleetwood, there are wider benefits of continuing to support its ongoing diversity and offer.
- 8.70 In any event, the comparison offer in Fleetwood is still one of the draws of the centre, and continues to perform an important role in helping to draw expenditure in. However, the offer has reduced considerably since the 2011 Study which although is partly due to wider commercial market implications, is also reflective of the overarching vitality and viability of the centre. Given this, wider physical improvements to the centre could help to encourage additional comparison operators in to the centre, and this should continue to be an important element of local plan policy, which should seek to encourage a diverse offer and the reoccupation of otherwise vacant units.
- 8.71 The 2011 Study also noted that there was a need for investment within Poulton-le-Fylde town centre, and that the redevelopment of the Teanlowe Centre could provide a good opportunity to meet this aspiration. This regeneration took place and subsequently opened in 2015, with a new foodstore operated by Booths, alongside smaller units occupied by a range of main town centre uses, including comparison operators. Although the nature of the comparison operators within Poulton leans towards the budget end of the market, the operators are well visited and there is an indication that the offer meets the needs of the local residents. We therefore do not consider there to be any requirement to plan for the growth of the comparison sector within Poulton.
- 8.72 Turning to Garstang, again the 2011 Study noted that the comparison offer was niche and that policy should protect this moving forward. The same conclusions apply today. The comparison offer within Garstang is considered to be good, and dominated by independent and boutique shops, many of which are high quality. Representation from national multiples is much more limited and largely comprises charity shops, although this is supplemented by the range of everyday non-food products available in the town's supermarkets. Overall, we consider that the comparison offer is good for a centre of Garstang's size and role.
- 8.73 In relation to decision taking, the lack of significant demonstrable quantitative capacity should not necessarily prevent the Councils from allowing new applications for retail development in existing designated centres, particularly where such developments would bolster the draw of such centres and encourage growth in line with the Council's aspirations and the centre's position within the retail hierarchy.
- 8.74 We would also stress that, in accordance with national planning policy and guidance, applications for retail developments above the locally set threshold (which we go on to consider below) and outside of the designated primary shopping area boundaries (where defined) would need to be considered in accordance with the sequential approach and retail impact assessment methodology. In this regard, if a primary shopping area is defined, then in accordance with the definitions provided within Annex 2 of the NPPF, this comprises the defined town centre for the purposes of retail planning considerations.



## 9. Assessment of Leisure Capacity

9.1 Our approach in considering leisure capacity is in two parts:

- For food and beverage floorspace, we adopt a similar approach as to that set out in respect of retail floorspace in the preceding Section 8 of this report.
- For large format commercial uses, we adopt a 'benchmarking' approach where we consider the typical population required to support different types of facilities. The benchmarking exercise reflects the fact that large format commercial uses are relatively limited in number and residents may be prepared to travel to watch a film or to go ten pin bowling. The current Study Area market share may not be instructive in respect of identifying future large format leisure requirements and therefore our preference is to undertake a benchmarking exercise.

9.2 For the purposes of the leisure capacity assessment below, we have not accounted for inflow of expenditure from visitors outside of the two authority areas. This is consistent with the approach adopted in the previous 2018 Blackpool Retail and Leisure Study. In any event, we provide further commentary on this point below, given the potential for these additional visitors to the authority areas to generate additional commercial leisure requirements.

### Need for Additional Leisure Facilities

9.3 Question 50 of the Household Survey found that over half of all respondents across both of the Blackpool and Wyre Council areas (55.5%) did not identify any leisure facilities which they wished to see more. This suggests that residents are largely happy with the provision of facilities.

9.4 In the figure below, we isolate the responses for each Zone in order to identify what the main requests for new leisure facilities were from residents in each area, and whether there are any easily identifiable gaps in provision. More than one suggestion was allowed.

**Table 9.1: Leisure Activities Requested by Zone (all Responses Totalling in Over 3.0%)**

Leisure Activity	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
Swimming pool	6.2%	2.9%	5.9%	2.5%	5.8%	3.6%	10.3%	6.4%	7.7%	4.6%	15.1%	5.7%
Cinema	5.8%	18.7%	5.7%	4.2%	4.1%	5.5%	9.0%	0.0%	4.1%	9.9%	0.0%	9.2%
Festivals / events	5.7%	5.6%	5.7%	4.0%	5.0%	3.9%	8.7%	1.4%	8.0%	11.8%	4.0%	3.6%
Better shopping facilities	5.5%	31.4%	9.6%	1.0%	10.7%	7.7%	4.2%	1.8%	2.1%	4.6%	0.0%	0.4%
Art galleries	5.1%	42.1%	19.8%	0.0%	1.7%	0.0%	2.1%	0.0%	0.0%	4.6%	0.0%	6.9%
Leisure facilities / activities for young children	4.9%	0.0%	4.1%	2.3%	8.8%	4.1%	2.7%	7.8%	7.5%	7.4%	1.6%	1.6%
Leisure facilities / activities for teenagers	4.1%	2.4%	6.9%	2.6%	0.9%	4.4%	4.7%	2.5%	5.9%	7.2%	3.1%	4.6%
Live music venues	3.4%	4.5%	2.1%	3.1%	5.0%	3.3%	2.1%	0.0%	6.9%	6.6%	0.0%	1.6%

Leisure Activity	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
Climbing centres	3.3%	7.7%	8.7%	2.1%	5.0%	3.3%	8.7%	0.0%	0.0%	2.9%	0.0%	0.0%
Comedy clubs	3.2%	14.9%	3.9%	0.0%	3.4%	0.0%	4.2%	0.0%	4.8%	5.7%	0.0%	3.1%
Pubs / bars	3.2%	16.2%	5.4%	0.0%	3.5%	0.0%	4.2%	0.4%	1.8%	7.9%	2.1%	0.0%
More sports facilities (football pitches, tennis courts)	3.1%	2.0%	0.0%	0.0%	1.7%	3.3%	2.7%	3.0%	6.8%	8.0%	0.0%	4.0%

Source: Appendix 2. Question 50 of NEMS Household Survey

- 9.5 The results show that other than within Zone 1, there is no notable area within which residents have a general consensus over the desired type of additional leisure facility. Within Zone 1, high proportions of residents state that they would like to see additional art galleries (42.1%), followed by better shopping facilities (31.4%) and 18.7% stated a cinema. It is noted that this section concentrates on leisure facilities instead of shopping and that the town centre is served well by the new Backlot cinema.
- 9.6 Broadly speaking though, residents within the two authority areas are happy with their provision of leisure facilities, with a total of 55.5% of residents stating that they did not like to see any more leisure facilities.
- 9.7 Despite a broad picture of residents being content with their leisure provision, this does not mean though, that qualitative or quantitative improvements might not be welcome in all areas of the authority areas. We examine below the scale of capacity which might arise by the end of the Plan period in 2041.

## Food and Beverage Requirements

### Leisure Expenditure Growth

- 9.8 To calculate per capita food and beverage expenditure, we have again utilised Experian Micromarketer G3 data. The base year for this expenditure data is also 2023. Experian provides separate per capita expenditure estimates on a zonal basis for 'restaurant and café meals per person' and 'alcoholic drinks (away from home) per person'.
- 9.9 There is no need to make allowance for special forms of trading expenditure (given that all food and beverage expenditure identified by Experian relates to eating and drinking in bars, pubs, cafes, and restaurants).
- 9.10 ERPBN22 provides annual leisure expenditure growth forecasts which we set out at the below Table 9.2. These growth rates are used to estimate increases in per capita food and beverage expenditure across the plan period to 2040.

Table 9.2: Experian Retail Planner Briefing Note 21 Leisure Expenditure Annual Per Capita Growth Rates

Year	Leisure Per Capita Annual Growth
2024	-1.6 %
2025	-0.0%
2026	0.3%
2027-31	0.6%
2032-40	0.7%

Source: Figure 1a of Experian Retail Planner Briefing Note 22 (March 2025)

9.11 We again recognise that growth in expenditure forecasts in the longer-term should be treated with caution given the difficulties in predicting economic performance over such an extensive timeframe.

9.12 Accepting this caveat, we are able to use Experian's recommendations in respect of annual expenditure growth to calculate expenditure across the food and beverage sectors at 2024, 2029, 2034, 2039 and 2041.

### Restaurant and Café Floorspace Requirements

9.13 Based on the assumed Study Area resident population and the available per capita restaurant and café expenditure, we estimate that £215.0m of such expenditure originates within the Study Area at 2024.

9.14 The below Table 9.3 indicates that available Study Area restaurant and café expenditure is forecast to increase to £247.5m at 2041.

**Table 9.3: Total Available Study Area Restaurant and Café Expenditure**

2024 (£m)	2029 (£m)	2034 (£m)	2039 (£m)	2041 (£m)
215.0	222.0	232.0	243.0	247.5

Source: Table 2 of Appendix 6  
Note: In 2023 Prices

9.15 Table 9.4 indicates that this represents an increase of £13.2m (or 6.1%) across the Study Area between 2024 and 2041.

**Table 9.4: Growth in Available Study Area Restaurant and Café Expenditure**

Growth 2024-41 (£m)
13.2

Source: Table 2 of Appendix 6  
Note: In 2023 Prices

9.16 Our methodology accounts for the fact that existing operators will look to increase their turnover going forward to remain viable. We provide a breakdown of the floorspace requirements for the Blackpool and Wyre authorities in turn below.

### Blackpool Restaurant and Café Floorspace Requirements

9.17 In terms of restaurant and café leisure patterns for residents in Blackpool, the town centre is the principal destination for residents in Zones 1 to 6, with the highest proportion of trips retained within the zone coming from Zone 1 and Zone 2 residents at 47.5% and 42.2% respectively. For Zone 3 residents, the town centre is still the principal destination at 26.0%, followed by Highfield Road at 10.3%. For Zone 4 and 5 residents, South Shore also features highly (at 18.5% and 11.7% respectively) and Bispham is a principal destination for Zone 6 residents, attracting 31.5% of trips.

9.18 As with retail capacity, this monetary surplus can be converted into a floorspace requirement. The average sales density of UK floorspace was around £9,581 per sq.m at 2024.<sup>27</sup>

<sup>27</sup> As derived from Figure 2 of Experian Retail Planner Briefing Note 22 – Leisure (March 2025).

- 9.19 We are aware of one major leisure commitment within the Blackpool authority area, this being the extant scheme at Blackpool Central. The hybrid consent permits a mixed use development which allows for additional food and beverage floorspace.
- 9.20 However, it has been recently announced that following the withdrawal of the former development partners, the Council is seeking a new investment partner to bring forward a scheme on the site. There is still a clear commitment to deliver a large-format leisure development but the precise details, quantum of floorspace or indeed resultant turnover is now an unknown. Given this, we do not provide a specific figure in the table below, but it is clear that any proposal at Blackpool Central would likely absorb any capacity across the plan period. In this regard, the figures presented below, which do not take account of the Blackpool Central proposal, indicate that the borough has capacity for up to 1,400 sq.m of additional restaurant or café floorspace across the plan period.

**Table 9.5: Net Quantitative Capacity for Restaurant and Café Floorspace in the Blackpool Authority Area**

Year	Surplus Expenditure (£m)	Residual Expenditure (£m)	Residual Floorspace Capacity (sq.m net)
2024	0.0	0.0	0
2029	2.9	2.9	300
2034	7.0	7.0	700
2039	11.6	11.6	1,200
2041	13.5	13.5	1,400

Source: Table 5d\_BBC of Appendix 6

Notes: Assumes constant market share (32.3%) of Study Area expenditure claimed by facilities in the authority area; allows for changes in benchmark turnover sales efficiency in accordance with Figure 2 of Experian Retail Planner Briefing Note 22 - Leisure; in 2023 Prices

### Wyre Restaurant and Café Floorspace Requirements

- 9.21 Looking at existing restaurant and café trips from Wyre residents, Cleveleys acts as an important destination for Zone 7 and 9 residents, attracting 33.9% and 26.2% of trips respectively, with Garstang featuring highly for Zone 10 residents at 22.9%. For Zone 8, Poulton is the principal centre, attracting a total of 41.8% of trips.
- 9.22 We are not aware of any commitments within the Wyre authority area for additional restaurant and café floorspace and that instead, such proposals have generally come forward on an ad-hoc basis within the centres.
- 9.23 Table 9.6 indicates that based on the current market share of restaurant and café facilities within the authority area, there is an identified capacity of 400 sq.m by 2029, which increases to 1,600 sq.m at 2041.

**Table 9.6: Net Quantitative Capacity for Restaurant and Café Floorspace in the Authority Area**

Year	Surplus Expenditure (£m)	Residual Expenditure (£m)	Residual Floorspace Capacity (sq.m net)
2024	0.0	0.0	0
2029	3.4	3.4	400
2034	8.2	8.2	900
2039	13.6	13.6	1,400
2041	15.8	15.7	1,600

Source: Table 5d\_WBC of Appendix 6

Notes: Assumes constant market share (51.1%) of Study Area expenditure claimed by facilities in the authority area; allows for changes in benchmark turnover sales efficiency in accordance with Figure 2 of Experian Retail Planner Briefing Note 22 - Leisure; in 2023 Prices

- 9.24 We anticipate that the required floorspace will comprise of relatively small-scale cafés and restaurants which would generally be accommodated within the principal centres on an ad hoc basis. We recommend that this floorspace requirement is directed towards Wyre’s defined centres in order to secure the re-use and repurposing of vacant floorspace, and do not recommend that the Council specifically allocates any additional sites.

### Licensed Premises Floorspace Requirements

- 9.25 Based on the assumed Study Area resident population and the available per capita alcoholic drinks expenditure, we estimate that £99.4m of alcoholic beverage expenditure originates within the Study Area at 2024.
- 9.26 The below Table 9.7 indicates that available Study Area licensed premises expenditure is forecast to increase to £114.3m at 2041.

**Table 9.7: Total Available Study Area Licensed Premises Expenditure**

2024 (£m)	2029 (£m)	2034 (£m)	2039 (£m)	2041 (£m)
99.4	102.6	107.2	112.3	114.3

Source: Table 7 of Appendix 5

Note: In 2023 Prices

- 9.27 Table 9.8 indicates that this represents an increase of £15.0m (or 15.0%) across the Study Area between 2024 and 2041.

**Table 9.8: Growth in Available Study Area Licensed Premises Expenditure**

Growth 2024-41 (£m)
14.9

Source: Table 7 of Appendix 6

Note: In 2023 Prices

### Blackpool Licensed Premises Floorspace Requirements

- 9.28 Our complete licensed premises quantitative assessment model is provided at Appendix 5 of this Study. Table 10a\_BBC of Appendix 6 identifies that £36.5m (equating to 36.2%) of Study Area alcoholic drink expenditure is directed to licensed premises in the Blackpool authority area at 2024.
- 9.29 Our methodology accounts for the fact that existing operators will look to increase their turnover going forward to remain viable. On this basis, we identify an expenditure surplus of £1.3m at 2029. Due to subsequent expenditure and population increases, the identified surplus increases to £3.2m at 2034, to £5.2m at 2039 and to £6.1m at 2041.
- 9.30 Once again, this monetary surplus can be converted into a floorspace requirement. Based on the average UK leisure sales density of £9,581 sq.m at 2024 (and allowing for future increases in the sales efficiency of leisure floorspace going forward), we estimate that 100 sq.m of additional licensed premises floorspace could be supported at 2029, increasing to 600 sq.m at 2041.
- 9.31 As set out above, we are aware of the continued investment aspirations for Blackpool Central, and that any capacity will likely be absorbed by this development across the plan period. We therefore do not recommend the allocation of additional sites for food and beverage development within or adjacent to Blackpool town centre.

**Table 9.9: Net Quantitative Capacity for Licensed Premises Floorspace in the Blackpool Authority Area after Commitments**

Year	Surplus Expenditure (£m)	Residual Expenditure (£m)	Residual Floorspace Capacity (sq.m net)
2024	0.0	0.0	0
2029	1.3	1.3	100
2034	3.2	3.2	300
2039	5.2	5.2	500
2041	6.1	6.1	600

Source: Table 10d\_BBC of Appendix 6

Notes: Assumes constant market share (36.2%) of Study Area expenditure claimed by facilities in the authority area; allows for changes in benchmark turnover sales efficiency in accordance with Figure 2 of Experian Retail Planner Briefing Note 21 - Leisure; in 2023 Prices

### Wyre Licensed Premises Floorspace Requirements

9.32 As set out in Table 9.10 below, we are not aware of any commitments for additional licenced premises within the Wyre authority area.

9.33 We therefore identify that across the plan period, there will be capacity for an additional 800 sq.m of licenced premises within the Wyre authority area.

**Table 9.10: Net Quantitative Capacity for Licensed Premises Floorspace in the Authority Area after Commitments**

Year	Surplus Expenditure (£m)	Residual Expenditure (£m)	Residual Floorspace Capacity (sq.m net)
2024	0.0	0.0	0
2029	1.6	1.6	200
2034	3.8	3.8	400
2039	6.3	6.3	700
2041	7.3	7.3	800

Source: Table 10d\_WBC of Appendix 6

Notes: Assumes constant market share (51.9%) of Study Area expenditure claimed by facilities in the authority area; allows for changes in benchmark turnover sales efficiency in accordance with Figure 2 of Experian Retail Planner Briefing Note 21 - Leisure; in 2023 Prices

9.34 Once again, we anticipate that this floorspace will typically consist of relatively small-scale licensed premises which come forward on an ad hoc basis and do not propose to allocate any specific sites. The identified floorspace requirement should, in the first instance, be directed towards Wyre's defined centres to facilitate the re-use and repurposing of vacant units.

### Commercial Leisure: Bingo, Cinemas, Ten Pin Bowling and Casinos

9.35 Our approach in identifying the potential for large format to the assessment of commercial leisure needs departs from the above monetary capacity assessment. This is because the commercial leisure sector is different to the retail and food and beverage sectors; large-scale leisure uses are relatively limited in number and customers often expect to travel at least some distance in order to access them. As such, we believe it is sensible to consider the general appropriateness of provision on a Study Area basis, with reference to the typical number of persons required to support particular uses.

9.36 Our assessment considers the typical population required to support bingo halls, casinos, cinema screens and ten pin bowling alleys, and is based around three key stages.

- 9.37 We firstly calculate the expected Study Area and local authority populations for the relevant reporting years.
- 9.38 We then calculate the number of persons required to support a bingo hall, casino, cinema screen and bowling alley nationally, across the UK. We have identified the current level of provision across the UK with reference to the following sources:
- figures supplied by the Bingo Association, a trade body representing licensed bingo operators, in 2024, which identify that there are 253 bingo halls across the UK;
  - Mintel's Casinos and Bingo UK report (March 2019), which confirm that there are 145 casinos across the UK;
  - the UK Cinema Association website<sup>28</sup> which identifies that there are 4,539 cinema screens across the UK; and
  - Mintel's Ten Pin Bowling UK report (May 2017), which identifies that there are 5,242 bowling lanes across the UK.
- 9.39 We then apply the respective ratio to the Study Area population and to the population of the two respective authority areas to gauge the benchmark level of provision, based on the position evident across the UK. We supplement our assessment with an overview of current patterns of commercial leisure trips throughout the Study Area (as identified by the NEMS household survey) to help identify any qualitative deficiencies in provision.
- 9.40 We recognise that some of these facilities are not as important as they perhaps once were in underpinning the local leisure economy. However, all four uses generally occupy large-format premises and, as such, if a requirement were to be identified then there are potential land use implications.

## Bingo

- 9.41 The Bingo Association identifies that there are 253 bingo halls across the UK, which equates to a bingo hall for every 268,830, persons or thereabouts.<sup>29</sup> Accordingly, we estimate that the Study Area population could theoretically support 1 bingo hall across the plan period.
- 9.42 Looking at the Study Area as a whole, the most popular destination is the Club 3000 located on Rigby Road attracting 47.7% of trips, followed by the Mecca Bingo on Talbot Road in Blackpool, attracting 39.1% of trips. Taken together, these facilities are the principal bingo destinations on a zonal basis too.
- 9.43 Table 9.11 below confirms the bingo hall capacity within Blackpool over the period to 2041.

**Table 9.11: Bingo Hall Capacity in the Blackpool Authority Area**

Year	Study Area Population	Typical Population Required to Support Hall	Potential Number of Halls Supported in the Study Area	Potential Number of Halls Supported in the Authority Area	Outstanding Potential Capacity in the Authority Area
2024	259,487	268,830	1.0	0.5	-1.5
2029	262,182	268,830	1.0	0.5	-1.5
2034	265,107	268,830	1.0	0.5	-1.5
2039	268,317	268,830	1.0	0.5	-1.5
2041	269,570	268,830	1.0	0.5	-1.5

Note: Typical population to support bingo hall calculated with reference to the Bingo Association figures supplied in 2024 and to Experian Micromarketer population forecasts for the UK

<sup>28</sup> <https://www.cinemauk.org.uk/the-industry/facts-and-figures/uk-cinema-industry-infrastructure/sites-and-screens/>, consulted on 28 November 2024.

<sup>29</sup> Based on Experian Micromarketer G3 data issued in October 2024, which identify a UK population of 68,014,115 persons at 2024.

9.44 We provide the bingo hall capacity within Wyre below.

**Table 9.12: Bingo Hall Capacity in the Wyre Authority Area**

Year	Study Area Population	Typical Population Required to Support Hall	Potential Number of Halls Supported in the Study Area	Potential Number of Halls Supported in the Authority Area	Outstanding Potential Capacity in the Authority Area
2024	259,487	268,830	1.0	0.4	0.4
2029	262,182	268,830	1.0	0.4	0.4
2034	265,107	268,830	1.0	0.4	0.4
2039	268,317	268,830	1.0	0.5	0.5
2041	269,570	268,830	1.0	0.5	0.5

Note: Typical population to support bingo hall calculated with reference to the Bingo Association figures supplied in 2024 and to Experian Micromarketer population forecasts for the UK

9.45 Based on the above, we do not identify any material levels of capacity for additional bingo halls within either authority area and the existing facilities are meeting demands.

## Cinemas

9.46 The UK Cinema Association website estimates that there are 4,539 cinema screens in the UK30, which equates to one screen for every 14,984 persons or thereabouts. On this basis, we estimate that the Study Area population could support around 7.1 cinema screens at 2024, increasing to around 8.3 screens at 2041.

9.47 Residents within the Study Area are typically choosing the Vue cinema in Cleveleys, where a total of 54.0% of trips are recorded in the household survey. However, for Zone 1 and 2 residents in particular, the Backlot cinema at Houndshill in the town centre is the principal destination, attracting 53.4% and 45.2% of trips respectively. For Zones 3, 4 and 5 residents, the Backlot Cinema (including IMAX screen) attracts a total of 23.1%, 19.3% and 37.9% of trips respectively. In terms of Zone 11 residents, they are travelling to The Flower Bowl to meet their cinema needs (64.4% of all trips).

9.48 There is one cinema within the Blackpool authority area, this being the Backlot Cinema at Houndshill. It is noted that some respondents stated they last visited the Odeon, but this closed in June 2023.

9.49 As Table 9.13 indicates below, the provision within Blackpool therefore exceeds the identified capacity up to 2041. Furthermore, as is indicated by the responses, residents have good access to additional cinema screens within neighbouring authority areas, including the Vue cinema in Cleveleys.

<sup>30</sup> At 2023.



**Table 9.13: Cinema Screen Requirement in the Blackpool Authority Area**

Year	Study Area Population	Typical Population Required to Support Cinema Screen	Potential Number of Cinema Screens Supported by Study Area	Potential Number of Cinema Screens Supported in the Authority Area	Outstanding Potential Capacity in the Authority Area
2024	259,487	14,984	17.3	9.3	-0.7
2029	262,182	14,984	17.5	9.3	-0.7
2034	265,107	14,984	17.7	9.4	-0.6
2039	268,317	14,984	17.9	9.4	-0.6
2041	269,570	14,984	18.0	9.5	-0.5

Note: Typical population to support a cinema screen calculated with reference to data provided by the UK Cinema Association website and to Experian Micromarketer population forecasts for the UK

9.50 We then provide the cinema screen requirement in the Wyre authority area below. Again, it is clear that there is no demand for additional cinema screens within the Wyre authority area. Although some residents in Zone 11 are travelling to the Flower Bowl to meet their needs, this is not considered to be an unsustainable journey and that there is limited opportunity to claw back this loss in expenditure within Garstang itself.

**Table 9.14: Cinema Screen Requirement in the Wyre Authority Area**

Year	Study Area Population	Typical Population Required to Support Cinema Screen	Potential Number of Cinema Screens Supported by Study Area	Potential Number of Cinema Screens Supported in the Authority Area	Outstanding Potential Capacity in the Authority Area
2024	259,487	14,984	17.3	7.7	-0.3
2029	262,182	14,984	17.5	7.8	-0.2
2034	265,107	14,984	17.7	8.0	0.0
2039	268,317	14,984	17.9	8.1	0.1
2041	269,570	14,984	18.0	8.1	0.1

Note: Typical population to support a cinema screen calculated with reference to data provided by the UK Cinema Association website and to Experian Micromarketer population forecasts for the UK

## Ten Pin Bowling

9.51 Mintel's Ten Pin Bowling UK 2017 report identifies that there are 5,242 ten pin bowling lanes across the UK, which equates to a bowling lane for every 12,975 persons or thereabouts.

9.52 Residents within the Study Area are principally choosing the Blackpool Bowl on Market Street (29.1%), followed by the YMCA Health and Fitness Centre in Cleveleys (21.2%). An additional 19.6% of trips are travelling to the Flower Bowl near Catterall.

9.53 As Table 9.15 indicates below, once the existing provision is considered within the authority area, there is no identified capacity for additional ten-pin bowling lanes within Blackpool.

**Table 9.15: Ten Pin Bowling Lane Requirement in the Blackpool Authority Area**

Year	Study Area Population	Typical Population Required to Support Bowling Lane	Potential Number of Bowling Lanes Supported by Study Area	Potential Number of Bowling Lanes Supported in the Authority Area	Outstanding Potential Capacity in the Authority Area
2024	260,418	12,975	20.0	10.8	-9.2
2029	263,132	12,975	20.2	10.8	-9.2
2034	266,029	12,975	20.4	10.8	-9.2
2039	269,235	12,975	20.7	10.9	-9.1
2041	270,509	12,975	20.8	10.9	-9.1

Note: Typical population to support ten pin bowling alley calculated with reference to the Mintel Ten Pin Bowling UK 2017 report and to Experian Micromarketer population forecasts for the UK

- 9.54 We then provide the ten pin bowling requirement in the Wyre authority area below. It is clear that there is also an oversupply of ten pin bowling lanes within the Wyre authority area.

**Table 9.16: Ten Pin Bowling Lane Requirement in the Wyre Authority Area**

Year	Study Area Population	Typical Population Required to Support Bowling Lane	Potential Number of Bowling Lanes Supported by Study Area	Potential Number of Bowling Lanes Supported in the Authority Area	Outstanding Potential Capacity in the Authority Area
2024	260,418	12,975	20.0	8.8	-1.2
2029	263,132	12,975	20.2	9.0	-1.0
2034	266,029	12,975	20.4	9.2	-0.8
2039	269,235	12,975	20.7	9.4	-0.6
2041	270,509	12,975	20.8	9.4	-0.6

Note: Typical population to support ten pin bowling alley calculated with reference to the Mintel Ten Pin Bowling UK 2017 report and to Experian Micromarketer population forecasts for the UK

## Casinos

- 9.55 Mintel's Casinos and Bingo UK 2018 report identifies that there are 145 casinos across the UK, which equates to a casino for every 469,063 persons or thereabouts.
- 9.56 Table 9.17 confirms that we estimate that the Blackpool authority area is well provided for in terms of casinos. In this regard, existing casinos include the Mecca Bingo on Talbot Road, Grosvenor Casino at The Sandcastle and Genting Casino on Queen's Promenade.

**Table 9.17: Casino Requirement in the Blackpool Authority Area**

Year	Study Area Population	Typical Population Required to Support a Casino	Potential Number of Casinos Supported by Study Area	Potential Number of Casinos Supported in the Authority Area	Outstanding Potential Capacity in the Authority Area
2024	260,418	469,063	0.6	0.3	-2.7
2029	263,132	469,063	0.6	0.3	-2.7
2034	266,029	469,063	0.6	0.3	-2.7
2039	269,235	469,063	0.6	0.3	-2.7
2041	270,509	469,063	0.6	0.3	-2.7

Note: Typical population to support casino calculated with reference to the Mintel Casinos and Bingo UK 2018 report and to Experian Micromarketer population forecasts for the UK

- 9.57 We then provide the casino requirement in the Wyre authority area below. Although there is a small capacity identified, we do not recommend the allocation of additional sites to meet this limited demand.

**Table 9.18: Casino Requirement in the Wyre Authority Area**

Year	Study Area Population	Typical Population Required to Support a Casino	Potential Number of Casinos Supported by Study Area	Potential Number of Casinos Supported in the Authority Area	Outstanding Potential Capacity in the Authority Area
2024	336,263	469,063	0.7	0.2	0.2
2029	349,567	469,063	0.7	0.2	0.2
2034	361,241	469,063	0.8	0.3	0.3
2039	372,051	469,063	0.8	0.3	0.3
2041	376,292	469,063	0.8	0.3	0.3

Note: Typical population to support casino calculated with reference to the Mintel Casinos and Bingo UK 2018 report and to Experian Micromarketer population forecasts for the UK

### Health and Fitness Centres

- 9.58 Despite the current uncertainties associated with available household income, the most recent research shows that the UK health and fitness industry is stronger than it has ever been as measured by number of gyms, membership and market value. The State of the Fitness Industry Report 2024, produced by the Leisure Database Company, finds overall, the UK health and fitness industry is performing strongly, with data indicating that member numbers, market value and penetration all surpassing pre-pandemic levels and reaching all-time highs. The report identifies that as of 2024, the number of gym members increased to 10.7m from 10.3m in 2023.
- 9.59 Gyms and health and fitness facilities of course make an important contribution to the health of the local authority's population across the complete spectrum of ages. The range of operators and brands within the health and fitness sector are now relatively broad, with a number of budget brands topping the market in terms of number of clubs open and who have experienced the most significant growth in recent years. Indeed, Puregym is hoping to add an additional 60-70 gyms to their portfolio by the end of 2025<sup>31</sup>.
- 9.60 Looking across the authority areas, there appears to be a good choice of health and fitness facilities, with a number of national multiples, independents and community run gyms and fitness facilities. The Table 9.19 below provides the details of the top ten health and fitness facilities within the authority areas.

**Table 9.19: Principal Health and Fitness Facilities (Top Ten)**

Leisure Activity	T'tal	Zone										
		1	2	3	4	5	6	7	8	9	10	11
Village Gym, East Park Drive, Blackpool, FY3 8LL	9.9%	0.0%	15.0%	38.8%	0.0%	6.6%	0.0%	26.2%	4.3%	0.0%	3.1%	0.0%
Bannatyne Health Club & Spa, Rigby Road, Blackpool, FY1 5EP	9.6%	18.9%	11.8%	0.0%	44.2%	20.8%	0.0%	9.2%	0.0%	0.0%	3.1%	0.0%
Moor Park Health & Leisure Centre, Bristol Avenue, Blackpool, FY2 0JG	8.0%	10.7%	0.0%	3.2%	0.0%	3.3%	47.0%	10.6%	15.8%	0.0%	0.0%	0.0%

<sup>31</sup> <https://www.puregym.com/blog/uk-fitness-report-gym-statistics/>

Leisure Activity	T'tal	Zone										
		1	2	3	4	5	6	7	8	9	10	11
JD Gyms, North Promenade, Cleveleys, Thornton-Cleveleys, FY5 1DW	5.7%	0.0%	0.0%	0.0%	0.0%	0.0%	15.6%	26.4%	0.0%	12.5%	11.5%	0.0%
Gymetc, Garstang Road East, Poulton-le-Fylde, FY6 8JP	4.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	30.3%	0.0%	0.0%	0.0%
YMCA Fleetwood Health & Fitness Centre, Esplanade, Fleetwood, FY7 6HF	4.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.3%	0.0%	50.7%	3.1%	0.0%
Palatine Leisure Centre, St Anne's Road, Blackpool, FY4 2AP	3.8%	0.0%	4.1%	13.6%	13.6%	6.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
YMCA Thornton Health & Fitness Centre, Victoria Road East, Thornton-Cleveleys, FY5 3SX	3.6%	0.0%	2.1%	0.0%	0.0%	0.0%	0.0%	10.6%	8.6%	3.3%	0.0%	5.8%
The Gym Group, Cookson Street, Blackpool, FY1 3EJ	3.5%	10.9%	0.0%	25.5%	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
JD Gyms, Vicarage Lane, Blackpool, FY4 4XL	3.5%	0.0%	17.5%	0.0%	9.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.5%

- 9.61 In terms of capacity, the results of the household survey indicate that a total of 20.7% of the population regularly participate in indoor sports or health fitness activities. The results also indicate that facilities within the authority area retain approximately 92.6% of trips.
- 9.62 The Study Area population is estimated to increase by 10,091 people by 2041. Assuming that a similar gym/health club participation level would apply to the new population as has been identified for the Study Area (i.e., 20.7%) this would equate 2,018 potential new gym members over the ten year period. Based on average membership levels for major gym operators (2,897 members) and budget gym operators (3,452 members), the anticipated uplift in the population over the period to 2041 could potentially support one additional small-scale gym.
- 9.63 Bringing forward new gym and health and fitness facilities will be dependent on market demand from operators seeking space in local authority areas. Proposals for new health and fitness facilities should be directed to defined centres in the first instance, in accordance with national policy. We do not however recommend the allocation of specific sites for such uses within the local plan, and that demand will very much be market-led.

### Other Commercial Leisure

- 9.64 There has been a growth in recent years in other more specialist commercial leisure attractions, including facilities such as trampoline parks, indoor soft play centres, ninja courses and a range of competitive social destinations. The latter is a fast-paced sector and is still continuing to grow and evolve throughout 2024 and into 2025, with new formats becoming present in the market. Such uses include urban golf, bar and game formats, which include games such as axe-throwing, shuffleboard, table tennis and so on, virtual reality gaming and escape

rooms. All of these commercial leisure uses fall within the defined town centre use bracket and typically require large floorplates.

- 9.65 Calculating a quantitative need for such uses is not possible, particularly given the evolving market and relative infancy of such uses. However, we are able to review the existing offer and consider whether there may be a qualitative requirement to increase the offer across the authority areas.
- 9.66 In terms of competitive leisure facilities, Blackpool town centre in particular is well served by facilities such as 'breakout rooms', urban mini golf, bar and game facilities and virtual reality experiences. These facilities typically provide a wider offer including a bar and restaurant and encourage longer dwell-times. Such uses are typically found in larger centres, as demonstrated by the concentration within the town centre, but there may be a market demand for such uses within some of the other larger district centres in the authority areas.
- 9.67 Although the market for such commercial leisure uses is still evolving, and alternative operators may still continue to require new premises across the authority areas, these should be assessed on a case-by-case basis, ensuring that such uses are directed towards defined centres in the first instance. This is particularly important given the wider benefits such uses can have in terms of encouraging longer dwell-times and increasing footfall and associated expenditure within centres.

## 10. Summary, Conclusions and Policy Recommendations

### Context

- 10.1 The principal purpose of the Study is to understand future retail and leisure needs, and to provide policy recommendations to assist the Councils in their preparation of the forthcoming respective Local Plans.
- 10.2 The Local Plans will set out the Council's strategy in respect of delivering new future growth in respect of a range of new developments, including housing, jobs, and main town centre uses. To ensure that commercial uses are delivered in sustainable locations, the Local Plan will provide up to date policies in respect of town centre boundaries, the hierarchy of defined centres, and local impact thresholds of relevance to retail and leisure developments.
- 10.3 In preparing the summary and conclusions below, it is also useful to refer back to the currently adopted local plan policies of relevance to defined centres and other commercial development within the authority areas. In this regard, understanding how they have worked in practice and how effective the policies have been in helping to support the vitality and viability of centres is key.
- 10.4 This concluding section of our report summarises the key findings of the Study and addresses planning policy requirements of relevance to retail, leisure, and town centres.

### Key Findings: Retail

#### Quantitative and Qualitative Capacity

- 10.5 The first step is to establish the quantitative capacity for additional convenience and comparison floorspace within each of the authority areas. Of course there is a degree of overlap between the two given that residents in Blackpool sometimes choose facilities in Wyre to meet their needs and vice versa, and that planning for any growth for residents on the periphery of the respective authorities within neighbouring authorities may be appropriate.
- 10.6 Table 10.1 below indicates that within the Blackpool authority area, there is capacity for additional convenience floorspace across the plan period. However, in terms of comparison floorspace, the Study does not identify any capacity for additional comparison floorspace across the plan period. As noted above, we recommend that longer-term forecasts are treated with caution, and that focusing on the first ten years is appropriate.
- 10.7 It is important to note that the convenience goods capacity identified within Blackpool is due to the level of inflow of expenditure estimated to be drawn to destinations within the borough from visitors. In this regard, the only suitable location to accommodate quantitative capacity would be in the town centre to specifically meet the needs of the tourism spend.
- 10.8 However, as we go on to explore in more detail below, we are of the view that the overarching offer within the central zones of the authority area is generally sufficient to meet both the residents' needs, and that if a site was to be brought forward for additional convenience floorspace then this would need to be centrally located to meet the needs of visitors into the authority area.

**Table 10.1: Quantitative Capacity for Convenience Goods and Comparison Goods Floorspace in the Blackpool Authority Area**

Year	Convenience Goods Floorspace Requirement		Comparison Goods Floorspace Requirement	
	Minimum (sq.m)	Maximum (sq.m)	Minimum (sq.m)	Maximum (sq.m)
2024	2,700	3,500	-600	-1,100
2029	1,600	2,100	-6,200	-10,600
2034	1,600	2,000	-6,300	-10,800
2039	1,600	2,100	-6,000	-10,300
2041	1,600	2,100	-5,800	-10,000

Source: Table 6d and 26d of Appendix 5

Note: In 2023 Prices

10.9 Turning to the Wyre authority area, as Table 10.2 below indicates, the Study identifies that there is capacity for between 4,200 and 4,800 sq.m of additional convenience floorspace by 2041 but no capacity for additional comparison floorspace.

10.10 Again, focusing on the shorter-term forecasts, Table 10.2 identifies that by 2034 the convenience capacity is for between 4,100 and 4,700 sq.m of additional convenience floorspace.

**Table 10.2: Quantitative Capacity for Convenience Goods and Comparison Goods Floorspace in the Wyre Authority Area**

Year	Convenience Goods Floorspace Requirement		Comparison Goods Floorspace Requirement	
	Minimum (sq.m)	Maximum (sq.m)	Minimum (sq.m)	Maximum (sq.m)
2024	5,400	6,900	0	0
2029	4,500	5,800	-1,600	-2,700
2034	4,500	5,700	-1,600	-2,700
2039	4,500	5,800	-1,500	-2,600
2041	4,500	5,800	-1,500	-2,500

Source: Table 6d and 26d of Appendix 5

Note: In 2023 Prices

10.11 We comment on the wider retail capacity findings later in this section, and how these relate to the qualitative findings and recommendations.

## Key Findings: Commercial Leisure

10.12 Our assessment of future leisure needs is in two parts, firstly looking at food and beverage floorspace and then moving onto looking at the larger-format leisure uses.

### Food and Beverage

10.13 Firstly, in terms of food and beverage floorspace, we have undertaken a quantitative assessment which identifies available expenditure and takes account of the need for existing businesses to increase their turnover to remain viable.

- 10.14 As Table 10.3 below indicates, the assessment for Blackpool borough has identified that at 2041 there is a requirement for 1,400 sq.m of restaurant and café floorspace and for 600 sq.m of licensed premises floorspace (this equating to a total of 2,000sq.m of food and beverage floorspace).
- 10.15 We are aware of one major leisure commitment within the Blackpool authority area, this being the extant scheme at Blackpool Central. The hybrid consent permits a mixed use development which allows for additional food and beverage floorspace.
- 10.16 However, it has been recently announced that following the withdrawal of the former development partners, the Council is seeking a new investment partner to bring forward a scheme on the site. There is still a clear commitment to deliver a large format leisure development but the precise details, quantum of floorspace or indeed resultant turnover is now an unknown. Given this, we do not provide a specific commitment figure in the table below as matters are likely to change, but it is clear that any proposal at Blackpool Central would likely absorb any capacity across the plan period. Should there be any 'spare' capacity beyond the Blackpool Central scheme, it is recommended that this is used to reoccupy otherwise vacant units within the defined centres, and that there may be an opportunity to encourage additional 'family orientated' style restaurants across Blackpool town centre in particular.

**Table 10.3: Net Quantitative Capacity for Restaurant and Café Floorspace and Licensed Premises Floorspace in Blackpool After Commitments**

Year	Restaurant and Café Floorspace Requirement (sq.m)	Licensed Premises Floorspace Requirement (sq.m)	Total Food and Beverage Floorspace Requirement (sq.m)
2024	0	0	0
2029	300	100	400
2034	700	300	1,000
2039	1,200	500	1,700
2041	1,400	600	2,000

Source: Tables 5\_BBC and 10\_BBC in Appendix 6

Note: Assumes constant market share of Study Area expenditure claimed by facilities in the authority area; allows for changes in benchmark turnover sales efficiency in accordance with Figure 2 of Experian Retail Planner Briefing Note 22 - Leisure; in 2023 Prices

- 10.17 Table 10.4 below also provides the comparable quantitative capacity figures focussing specifically on the Wyre authority area. In this regard, our assessment has identified that at 2041 there is a requirement for 1,600 sq.m of restaurant and café floorspace and for 800 sq.m of licensed premises floorspace (this equating to a total of 2,400 sq.m of food and beverage floorspace).



**Table 10.4: Quantitative Capacity for Restaurant and Café Floorspace and Licensed Premises Floorspace in Wyre Authority Area after Commitments**

Year	Restaurant and Café Floorspace Requirement (sq.m)	Licensed Premises Floorspace Requirement (sq.m)	Total Food and Beverage Floorspace Requirement (sq.m)
2024	0	0	0
2029	400	200	600
2034	800	400	1,200
2039	1,400	700	2,100
2041	1,600	800	2,400

Source: Tables 5\_WBC and 10\_WBC in Appendix 6

Note: Assumes constant market share of Study Area expenditure claimed by facilities in the authority area; allows for changes in benchmark turnover sales efficiency in accordance with Figure 2 of Experian Retail Planner Briefing Note 22 - Leisure; in 2023 Prices

10.18 We anticipate that the required floorspace will comprise of relatively small-scale cafés, restaurants and licensed premises which would generally be accommodated within the principal centres on an ad hoc basis. We recommend that this floorspace requirement is directed towards Wyre’s defined centres in order to secure the re-use and repurposing of vacant floorspace.

### Large Format Leisure

10.19 We have undertaken a quantitative benchmarking exercise to identify general requirements in respect of large format leisure uses.

10.20 This has identified that in terms of the large format leisure facilities across both authority areas, residents are generally well provided for (either within the authority area, or within a sustainable travel distance to neighbouring authority areas). Whilst there may be opportunities to enhance the leisure offer through ad-hoc planning applications, we do not recommend that sites are specifically allocated for additional large format leisure schemes within either authority area. Any such planning applications should be assessed against the relevant sequential and impact policy tests provided for within the two local plans and the NPPF.

10.21 Overall, we do not anticipate there to be operator demand to bring forward larger format leisure uses in the authority areas over the plan period to 2041.

### Key Findings: Principal Centres

10.22 The Study has reviewed the vitality and viability of defined town and district centres across the two authority areas. Our assessments have been undertaken with reference to the town centre healthcheck indicators set out at paragraph 006 of the Town Centres and Retail PPG.

10.23 We set out the overarching conclusions in respect of Blackpool’s principal centres below.

**Table 10.5: Summary of Findings of the Healthchecks of Principal Centres**

Name	Centre Summary
<b>Blackpool Centres</b>	
Blackpool town centre	Blackpool town centre plays a critical role in supporting the retail, leisure, and service needs of its residents, as well as attracting a significant number of visitors throughout the year. The Houndshell Shopping Centre acts as a key anchor, offering a range of national multiples focused principally on the comparison sector,

Name	Centre Summary
<b>Blackpool Centres</b>	
	<p>alongside a range of leisure uses including the Backlot cinema. Other key attractions within or in proximity to the town centre include the Blackpool Tower, Winter Gardens, and the Pleasure Beach ensure a steady stream of tourists that bolster footfall and expenditure.</p> <p>However, the centre faces notable challenges, including high vacancy rates, areas of underinvestment, and an over-reliance on the tourism economy, which creates seasonal fluctuations in performance. Perceptions of anti-social behaviour and crime also impact the centre's appeal, particularly in the evening economy. Improved integration between key zones—such as the seafront, the town centre, and major developments like Blackpool Central—could help encourage linked trips and improve overall economic performance.</p> <p>Recent and planned investments, including the Blackpool Central leisure scheme, the Houndshill Shopping Centre extension which houses Backlot Cinema, and the Talbot Gateway project, represent significant opportunities to enhance the centre's offer and attract higher-spending demographics. Additionally, efforts to improve public realm, connectivity, and branding could strengthen Blackpool's position as a key destination for both leisure and business tourism.</p> <p>Considering these factors, our overall conclusion is that while Blackpool town centre exhibits signs of vulnerability, particularly in its retail sector, there are considerable opportunities to leverage its existing strengths, ongoing investments, and cultural appeal to secure its vitality and viability for the future.</p>
Highfield Road district centre	<p>Highfield Road is linear in form, beginning with the terrace of commercial units at Lytham Road, leading to Highfield Road on the west, and the junction of Abbey Road and Highfield Road to the east.</p> <p>The centre comprises a total of 9,350 sq.m of commercial floorspace and 93 units. It is not 'anchored' by a larger convenience operator but does include a Tesco Express, alongside a range of smaller convenience, comparison, leisure and service uses. The centre's comparison and leisure offer is particularly strong in terms of the proportion of units, and the vacancy level is lower than the national average. There is an opportunity to enhance the centre through public realm improvements including additional green infrastructure, street furniture and the encouragement of outdoor seating for leisure operators, where appropriate and the physical environment allows.</p> <p>Overall, the centre is performing its role as a district centre, meeting the needs of the local residents in the walk-in catchment. It is considered to be vital and viable.</p>
Waterloo Road district centre	<p>Overall, we consider the centre to still be performing its designated role as a district centre in terms of meeting the needs of local residents within the catchment, by providing facilities for convenience shopping and service uses (hairdressers, health and beauty salons and so on).</p> <p>However, the centre has a high vacancy rate in terms of both units and floorspace, with some particularly prominent units and sites detracting significantly from the centre's environmental quality. Further work to enhance the fascias and public</p>

Name	Centre Summary
<b>Blackpool Centres</b>	
	realm within the centre could assist in improving the overall vitality of the district centre, along with the encouragement of alternative uses for the otherwise vacant units.
Whitegate Drive district centre	<p>Whitegate Drive district centre is a relatively diverse centre with a below average vacancy rate in terms of both the number of units and the proportion of floorspace. In terms of the level of floorspace, the centre is one of the smaller district centres in the authority area. However, the composition and offer of the centre ensures that it still meets the needs of the local catchment. The centre is particularly well provided for in terms of the financial and business offer and the retail service offer and provides a good top-up convenience offer for residents.</p> <p>Due to the centre's location and formation around a busy road, vehicular traffic dominates somewhat and there are instances of car parking on the pavement which can impact on pedestrian safety. There are some instances where green infrastructure benefits the centre and it may be that there are opportunities to enhance this further throughout the length of Whitegate Drive.</p> <p>Overall, the centre is considered to be healthy and is meeting the needs of the local catchment well.</p>
Layton district centre	<p>Layton district centre is located approximately 2 km to the north-east of Blackpool town centre. Talbot Road adjoins the south-western boundary of the district centre, linking Layton with Blackpool town centre.</p> <p>The centre comprises a total of 4,871 sq.m of commercial floorspace, across a total of 48 units. It is not the largest district centre in the borough but provides a good diversity of uses, particularly focused around the leisure and retail service offer. The centre also includes both a Co-op foodstore and a Morrisons Daily, providing a good local convenience provision for the catchment.</p> <p>The centre benefits from a good quality public realm, which has sought to encourage people to sit and enjoy the centre. However, there are instances where this is perhaps not designed with safety in mind, and the location of benches and areas to meet are not within the optimal places within the centre.</p> <p>Overall however, although one of the smaller centres in the borough, it provides for its local catchment well and includes a good offer of commercial uses predominantly for the walk-in catchment. It is considered to be a vital and viable centre and continues to perform its role as a district centre well.</p>
Bispham district centre	<p>Bispham district centre is located approximately 5 km north of Blackpool town centre. The western boundary of the centre adjoins the Queen's Promenade which runs southwards towards Blackpool town centre. The centre is in walking distance of the seafront, and the Bispham tram stop is located adjacent to the Promenade. The centre is formed either side of Red Bank Road, with some on street parking and a quantum of off street parking available adjacent to the Sainsbury's store.</p> <p>The centre comprises a total of 12,579 sq.m or 78 units, and other than the financial sector, is relatively diverse. The centre is one of the few anchored by a</p>

Name	Centre Summary
<b>Blackpool Centres</b>	
	<p>larger format convenience operator, which serves an important role in encouraging journeys into the centre.</p> <p>Overall, it is considered that the centre functions well as a district centre and is vital and viable overall, despite the relatively high number of vacant units.</p>

10.24 We then set out the overarching conclusions in respect of Wyre’s principal centres below.

**Table 10.6: Summary of Findings of the Healthchecks of Principal Centres in Wyre**

Name	Centre Summary
<b>Wyre Centres</b>	
Fleetwood town centre	<p>Fleetwood performs well in providing for the convenience retail and service needs of its residents, with its Asda superstore in particular providing an extensive offer and drawing expenditure from a substantial catchment. On its trading days, Fleetwood Market also constitutes a major draw, attracting coach trips and other visitors from across the North West.</p> <p>However, the town centre’s non-food shopping sector is impacted by its proximity to Affinity, which has resulted in a relative lack of national multiples and an offer that is largely skewed towards the lower or value end of the market. Improved connectivity between Affinity and the town centre could help to generate linked trips to help support the vitality and viability of Fleetwood.</p> <p>Another key challenge for Fleetwood is its high vacancy rates, which are above national averages in terms of both floorspace and units, and which consequently have a negative impact on the street-scene and wider centre environment. One beneficial way to repurpose some of the town centre’s vacant retail floorspace could be the introduction of a more diverse range uses to support the evening economy, especially family restaurants.</p> <p>In recent years, Fleetwood has benefitted from substantial public-sector investment and partnership working through Future Fleetwood, including improvements to the appearance and working environment of the Market. More recent planned interventions, and particularly the projects outlined in the Fleetwood Waterfront Leisure Masterplan 2024, represent significant opportunities to build on and complement this work in order to secure Fleetwood’s long-term resilience.</p> <p>Taking all of these factors into account, our overall conclusion is that while the health of Fleetwood town centre is currently vulnerable, there are considerable opportunities to enhance its vitality and viability over the long term.</p>
Cleveleys town centre	<p>Cleveleys town centre performs well in serving a dual function as both a shopping and service destination that fulfils the everyday needs of local residents, as well as a seaside visitor attraction underpinned by a strong family-friendly leisure offer. As</p>

Name	Centre Summary
<b>Wyre Centres</b>	
	<p>a consequence, the centre enjoys high footfall and low vacancy rates, which contribute to a general perception of safety and security during daytime hours.</p> <p>The evening economy could be better developed, with the centre lacking a focal point for night-time uses that could ensure they become mutually reinforcing. Similarly, the Goad area of Cleveleys contains just two hotels, with the majority of overnight visitors staying in Blackpool and undertaking daytrips to the town centre.</p> <p>Accessibility is a key strength, particularly via public transport, with Cleveleys being well-served and benefitting from its own tram stop and bus station. However, the tramline does obstruct pedestrian movement between the west and east of the centre, and the elongated nature of the high street (which measures c. 700m) is another barrier to walkability.</p> <p>While the town centre has benefitted from investment in its seafront and Promenade, many of its shopfronts would benefit from modernisation and the bus station in particular needs further phases of enhancements to its appearance. Nevertheless, the centre is generally free of graffiti and litter, and its linear layout, wide streets and flat topography make it traversable for those with impaired mobility. Our overall conclusion is that Cleveleys is a reasonably vital and viable town centre.</p>
Garstang town centre	<p>The historic and compact nature of the town centre means that Garstang offers a pleasant shopping and leisure environment which attracts good levels of footfall. Garstang's market heritage is evident, with both its Indoor Market and its popular Thursday Outdoor Market hosting a variety of unique local and artisanal traders, which contribute to the appeal of the centre.</p> <p>The convenience offer is particularly strong, being anchored by the in-centre Booths and Aldi supermarkets and complemented by a range of high-quality independents. With regard to comparison shopping, while there is a lack national multiples in the town centre, we consider one of Garstang's key strengths to be the quality and quantity of its independent retailers.</p> <p>The leisure offer – while including several independent pubs, bars, restaurants and cafés – would benefit from increased diversity in the form of more family-focussed facilities or the introduction of more upmarket restaurants to capitalise on the centre's affluent catchment.</p> <p>Although research for the Garstang Regeneration Framework suggests that the current provision is meeting most of the demand, parking issues are another key challenge for the town centre. There is a lack of long-stay parking and no dedicated coach parking spaces, both issues that could be addressed through a Town Centre Parking Strategy. In general, however, the centre is accessible by a range of means of transport and reasonably walkable.</p> <p>Our overall conclusion is that Garstang is a healthy town centre. It is performing well when compared against several key indicators and enjoys low vacancy rates both in terms of the number of units and proportion of floorspace.</p>

Name	Centre Summary
<b>Wyre Centres</b>	
Poulton town centre	<p>Poulton effectively fulfils the everyday convenience retail and service needs of its local residents, being anchored by Booths and Aldi and containing a good variety of independent traders. Moreover, the town centre achieves success as a daytime and evening food and drink destination.</p> <p>Comparison provision is more limited, likely reflecting the proximity of Blackpool town centre, which is a focus of higher order goods. Nonetheless, the centre supports a range of national multiples, albeit skewed towards the lower or value end of the market, and some high-quality independent retailers.</p> <p>However, Poulton's layout and traffic congestion pose some challenges, particularly for pedestrians. The busy and wide roads detract from the overall walkability of the centre and, while there are areas of the town centre that benefit from pedestrianisation, further improvements are recommended to prioritise pedestrians and enhance safety. Anti-social behaviour associated with the evening economy uses focussed in the north of the town centre is another issue in Poulton.</p> <p>Despite these challenges, we consider that Poulton is overall a healthy town centre benefitting from low vacancy rates, high footfall, an attractive and historic environment, and good public transport connections.</p>

## Future Retail and Centres Strategy

- 10.25 It will be important to ensure that any further development is appropriately located in respect of the needs that it would serve and in respect of ensuring that no defined centre is the subject of a 'significant adverse' impact as a result of new entrants into the grocery market in particular.
- 10.26 The provision of main food shopping destinations within and around defined centres is a key strength of some of the centres across the two authority areas and the benefit of retaining this should be given substantial weight when considering future convenience goods retail proposals. Ensuring competing out of centre developments do not proceed to the detriment of existing in centre or even edge of centre stores will need to continue to be Blackpool and Wyre's priority moving forward. Given this, it is important that although a quantitative capacity has been identified for additional convenience goods within Wyre, that any schemes for additional floorspace are not brought forward to the detriment of existing centres and their respective convenience facilities.
- 10.27 There may be opportunities to enhance the convenience offer of centres within the authority areas should appropriate sites within or on the edge of the centres come forward. Importantly, any scheme would need to demonstrate that there would not be a significant adverse impact on the defined centres.
- 10.28 In terms of service sectors, financial and business transactions have increasingly moved online and 'bricks and mortar' financial service provision has significantly reduced as a consequence. This trend will not be reversed. It will be important to ensure that premises previously put to such use are repurposed and brought back into active use. By way of example, former bank and building society premises can often be made into attractive bars and restaurants which are able to enhance a centre's wider offer (including the evening economy).

- 10.29 Whilst the economic picture is currently challenging for hospitality operators, we consider that further potential exists to expand the leisure sector offer within the authority's principal centres across the medium to longer term and the assessment undertaken to support this Study confirms that there is a capacity for additional food and beverage floorspace across the authority areas and in particular, within Wyre (due to the Blackpool Central scheme in Blackpool likely absorbing future food and beverage capacity). This is likely to come forward on a case by case basis and we do not recommend that specific sites are identified for any growth. Instead, policy should support the diversification of centres where appropriate, encouraging wider uses which draw in visitors throughout the day and into the evening, which will include the widening of the leisure offer in the centres.
- 10.30 It is highly unlikely that there will be substantial comparison goods retail development coming forward within the local authority areas across the plan period. In practice, some in-centre retailers may close. This could open up town centre space for convenience retailers, and for the growth of the leisure and retail service sectors.
- 10.31 In particular, food and drink operators are a critical component of a modern town centre, and the future success of these operators is inextricably linked to centres' overall vitality. Improved local leisure provision will mean a reduced need to travel further afield to eat, drink and socialise. This reduces carbon emissions and accords with sustainable development principles (particularly as a rounded retail and service offer should encourage linked trips and reduce travel).

## Meeting Retail Needs

### Convenience Requirements – Blackpool Authority Area

- 10.32 It is clear overall that the Blackpool authority area is generally well provided for in terms of the scale and offer of foodstores. Indeed, Blackpool's foodstores are also in part serving Wyre's residents in the northern part of the borough (and vice versa). The positioning, types of operators and scale of these operators is well provided for across the authority area on the whole.
- 10.33 The Council allocated a site within the town centre in the Blackpool Local Plan Part 2. In this regard, Policy MUSA1 allocates the land at Church Street (former Syndicate site) for a mixed-use development, including a foodstore (up to 2,500 sq.m) and a multistorey car park. It is understood that no proposal has yet been progressed on the site in accordance with the allocation. In coming to a conclusion on the potential qualitative need for a new foodstore, it is important that this existing allocation is given due consideration. We return to this later in this section.
- 10.34 Looking at the current picture across the authority area and focusing on Zones 1 to 6 in particular, it is clear that for each zone except Zones 4 and 6, the convenience operators when considered together on a zonal basis, are performing below their benchmark averages. It follows that for the purposes of the benchmark turnover assessment, inflow of expenditure from visitors outside of the authority area is not taken into account. Therefore, the level of undertrading of some of the stores (particularly those in Blackpool town centre which will be most frequented by visitors to the authority area) may not be as substantial as that which is presented in the quantitative tables. In this regard, it is considered likely that the majority of inflow into Blackpool will be spent at retailers within and surrounding the town centre, for both convenience and comparison retailing. Therefore, any consideration for additional floorspace should in practice be focused to this key tourist area.
- 10.35 In this regard, the larger superstores, comprising the Sainsbury's at Talbot Gateway (Zone 1), the Asda on Cherry Tree Road (Zone 5) and the Tesco at Clifton Retail Park (Zone 5) are all identified to be undertrading, with the Sainsbury's in Blackpool town centre identified to be performing considerably below the national company benchmark average (although we do note that a proportion of the inflow identified will likely be directed to this



store). The same position was also established as part of the 2018 Study, insofar as the same stores were identified as undertrading at that point too.

- 10.36 It is important to note that there are a number of stores, principally discount retailers (Aldi and Lidl stores) which are trading above company benchmark average, indicating a continued strong demand for these types of operators from residents within Blackpool, and beyond. One such retailer is the relatively new Aldi at Holyoake Avenue, (Zone 6) which is a new entrant into the market subsequent to the previous Study and which draws expenditure from residents in Zone 1 in particular. Furthermore, the Lidl at Bloomfield Road (Zone 2) also draws expenditure from residents in Zone 2. It is considered that the new Aldi at Holyoake Avenue will have to some degree, met the qualitative need identified in the 2018 Study.
- 10.37 However, the zonal retention level of main food convenience expenditure of residents in Zones 1 to 3 is still relatively low, with the lowest identified in Zone 2. As discussed above, key convenience operators include the Sainsbury's at Talbot Gateway, the Lidl at Bloomfield Road and the Lidl at Devonshire Road. Although in each of these zones there are main food shopping facilities, it could be argued that there is a general lack of consumer choice, which is why shoppers are traveling further to meet their needs.
- 10.38 Given the above, it is therefore of relevance to reconsider the potential qualitative need for additional convenience floorspace within these Zones (1-3) and whether the existing provision – although not located in the same corresponding zone – still represents a sustainable shopping option for residents.
- 10.39 In this instance, alongside the Sainsbury's at Talbot Gateway, residents of Zone 1 are choosing the Aldi stores at Holyoake Avenue and Blackpool Retail Park to meet their main food shopping needs, and alongside the Lidl at Bloomfield Road. In addition, residents in Zone 2 are choosing the Aldi at Oxford Square, the Asda at Cherry Tree Road and the Tesco at Clifton Retail Park all in Zone 5 to meet their main food shopping needs. As such, it is clear that residents are still choosing to travel to these stores to meet their needs. Although for some, this will not equate to unsustainable shopping patterns, it does in some cases indicate that the overarching provision within easy access of those living and visiting (staying) in the town centre may be limited.
- 10.40 Again, taking account of the fact that the quantitative need arises solely due to level of inflow included in the assessment, and this demand being principally within the town centre, it is relevant to consider the potential opportunities to improve the provision in the town centre, as was the case in 2018. As noted, any need that may arise would need to be suitably located to meet the requirements of those visiting the town centre from outside of the area. The quantitative need identified across the plan period is for one medium-sized foodstore, or a series of smaller stores equating to the same level of floorspace. On this basis, should an appropriate site come forward in the town centre for additional convenience floorspace, this would meet that identified qualitative and quantitative need (i.e. the need generated by the level of tourism inflow).
- 10.41 We are not aware of any additional sites within the town centre which could meet this need, beyond that which is allocated at the former Syndicate Site. As such, should a site become available within the town centre or the wider resort core, there could be a case to be made that this could meet that identified deficiency. Whether this is on the currently allocated site, or an alternative site, will be market driven.
- 10.42 Given the above, it is recommended that should a suitable site come forward within the town centre or wider resort core over the plan period, then the suitability of that site to accommodate an additional convenience store to complement the existing convenience offer should be explored. It may be that the existing allocated site continues to be the most appropriate site, or that an alternative comes forward as part of the wider town centre redevelopment schemes over the coming years.



- 10.43 Should proposals come forward outside of this area for additional floorspace, they should be assessed on their own merits against the relevant retail policy tests. This will ensure that should a town centre or edge of centre site be available, then proposals will be directed to these sites as part of the sequential test.

#### Convenience Requirements – Wyre Authority Area

- 10.44 As noted above, there is an identified quantitative requirement for additional convenience floorspace within the Wyre authority area. The quantitative capacity identified is due to the number of stores over trading in the authority area. This can be seen in particular in respect of the Aldi and Morrisons stores in Cleveleys (Zone 7), the Aldi and to a lesser extent the Lidl in Poulton (Zone 8), the Aldi and Asda stores in Fleetwood (Zone 9) and the Aldi store in Garstang (Zone 11).
- 10.45 Overall when taken together, the stores in Zones 7, 8, 9 and 11 are all overtrading, indicating that there is perhaps both a quantitative and qualitative demand for additional convenience operator representation within Wyre but specifically within these geographical areas of the authority area.
- 10.46 Looking firstly at Thornton-Cleveleys, there is a clear level of overtrading identified, where not only do the discounters (Aldi and Lidl) overtrade, but also the Morrisons foodstore, which is identified as performing strongly against its company benchmark average. However, it is considered that the convenience offer in terms of the nature of operators and size of stores within Zone 7 as a whole (and the offer in the adjacent zones such as 6 and 8) provide for good access overall for residents in this part of the authority area. In any event, given the proximate stores to the south within the Blackpool authority area but which still very much provide additional consumer choice for residents in Wyre, we do not recommend allocating any additional sites for convenience provision and that instead, should any proposals come forward, these are assessed on their own merits against the relevant retail policy tests.
- 10.47 Looking at Fleetwood, again there is a clear quantitative and qualitative requirement to improve the convenience offer within the wider settlement area, with the Asda and Aldi stores (both situated in in centre locations in planning policy terms) performing well and the offer in terms of store fascia being relatively limited. If it were the case that an appropriate site was to come forward on the edge of the centre, the potential impact on the existing convenience provision within Fleetwood would need to be considered, including on the Asda store. In any event, potential site opportunities for additional convenience provision have been discussed with the local authority, and no suitable town centre sites have been identified as part of this process. As such, we again do not recommend that a site is allocated as part of the local plan but that any proposals are assessed against the relevant retail policy tests and in particular, ensuring that they benefit Fleetwood town centre.
- 10.48 It is considered that the overarching offer within Garstang is suitable for the catchment, and that there is no immediate requirement to grow the convenience offer or representation. Again, should proposals come forward, then these should be assessed on a case by case basis in accordance with adopted planning policy, which seeks to protect the defined centre.
- 10.49 Overall, it is considered that although there is a quantitative capacity identified, the provision of foodstores both within the Wyre authority area, when taken together with the offer in Blackpool, broadly meets the needs of the residents within the authority area. As such, we do not recommend allocating any sites for additional floorspace within the authority area and that any proposals are assessed on their own merits against the relevant retail policy tests. In particular, specific emphasis should be placed on the need to help improve the vitality and viability of Fleetwood town centre should additional proposals for convenience floorspace come forward in the northern part of the authority area.

### Comparison Requirements – Blackpool Zones

- 10.50 The comparison retailing market is more volatile than the convenience market, with both the level of online spending being higher and the propensity of shopping trips to purchase comparison goods generally being less frequent. Residents are often willing to travel greater distances to meet their comparison shopping needs, which can have implications on operator requirements and demands.
- 10.51 The quantitative assessment provided above indicates no capacity across the plan period. Importantly, it is considered that any comparison capacity would be absorbed through the reoccupation of suitable vacant floorspace within defined centres
- 10.52 The market share analysis indicates that there is still a draw to the out of centre facilities in terms of residents' available comparison expenditure, which is to the most part, a detriment to Blackpool town centre and to a lesser extent, the smaller centres within the authority area.
- 10.53 However, Blackpool town centre and specifically Houndshell Shopping Centre, is still a key draw for residents both within the borough and further afield, and which houses a range of comparison operators meeting a variety of needs. The operators range from relatively high level clothing and footwear operators such as Frasers and Flannels, to the more affordable operators such as Primark and New Look. The shopping centre also includes a range of health and beauty operators, telecommunication operators, shoe shops and jewellery shops. Although the comparison offer within the town centre has contracted since the previous study, and there is a real concentration of retailing focused around Houndshell and the surrounding adjacent streets, there is not an immediate requirement for additional floorspace or operators within the centre.
- 10.54 Given the above, and taking account of the commercial climate, we do not conclude that there is a qualitative demand for additional comparison floorspace within Blackpool town centre. As such, we do not recommend that sites are specifically allocated for additional comparison floorspace within or adjacent to the town centre.
- 10.55 Looking at the smaller centres within the authority area, these are broadly meeting local and day-to-day needs, including from a comparison retailing perspective. Although the centres vary in terms of the qualitative offer and the types of operators range throughout the authority area, we consider that demand for additional facilities within these centres will not be considerable. As such, we again do not recommend that sites are allocated for additional comparison floorspace within or adjacent to the district centres within the borough.

### Comparison Requirements – Wyre

- 10.56 It is clear that Blackpool town centre still performs an important role in meeting the qualitative needs of Wyre's residents, but that centres such as Cleveleys and the out of centre facility at Affinity are also very important in retaining expenditure and providing an offer which meets some of the demand of residents.
- 10.57 The 2011 Study identified that both Fleetwood and Cleveleys serve as important comparison goods destinations for Wyre residents, which continues to be the case. The requirement to improve the quality and quantity of comparison goods retailing in these centres was noted as an important recommendation, in order to draw expenditure back into the authority area. Whilst this would still be recommended, there has been an overarching improvement in terms of the offer of comparison retailing at Affinity, which is certainly going some way to meeting residents' needs. Although not located within the defined town centre boundary of Fleetwood, there are wider benefits of continuing to support its ongoing diversity and offer.

- 10.58 In any event, the comparison offer in Fleetwood is still one of the draws of the centre, and continues to perform an important role in helping to draw expenditure in. However, the offer has reduced considerably since the 2011 Study which although is partly due to wider commercial market implications, is also reflective of the overarching vitality and viability of the centre. Given this, wider physical improvements to the centre could help to encourage additional comparison operators in to the centre, and this should continue to be an important element of local plan policy, which should seek to encourage a diverse offer and the reoccupation of otherwise vacant units.
- 10.59 The 2011 Study also noted that there was a need for investment within Poulton-le-Fylde town centre, and that the redevelopment of the Teanlowe Centre could provide a good opportunity to meet this aspiration. This regeneration took place and subsequently opened in 2015, with a new foodstore operated by Booths, alongside smaller units occupied by a range of main town centre uses, including comparison operators. Although the nature of the comparison operators within Poulton leans towards the budget end of the market, the operators are well visited and there is an indication that the offer meets the needs of the local residents. We therefore do not consider there to be any requirement to plan for the growth of the comparison sector within Poulton.
- 10.60 Turning to Garstang, again the 2011 Study noted that the comparison offer was niche and that policy should protect this moving forward. The same conclusions apply today. The comparison offer within Garstang is considered to be good, and dominated by independent and boutique shops, many of which are high quality. Representation from national multiples is much more limited and largely comprises charity shops, although this is supplemented by the range of everyday non-food products available in the town's supermarkets. Overall, we consider that the comparison offer is good for a centre of Garstang's size and role.
- 10.61 In relation to decision taking, the lack of significant demonstrable quantitative capacity should not necessarily prevent the Councils from allowing new applications for retail development in existing designated centres, particularly where such developments would bolster the draw of such centres and encourage growth in line with the Council's aspirations and the centre's position within the retail hierarchy.
- 10.62 We would also stress that, in accordance with national planning policy and guidance, applications for retail developments above the locally set threshold (which we go on to consider below) and outside of the designated primary shopping area boundaries (where defined) would need to be considered in accordance with the sequential approach and retail impact assessment methodology. In this regard, and as defined by the NPPF, 'in centre' for the purposes of the sequential and impact test for retail proposals is considered in the context of the defined primary shopping area.

### Meeting Commercial Leisure Needs

- 10.63 As Section 9 demonstrates, we do not identify any capacity for large format leisure floorspace within the authority areas. We do, however, identify a floorspace capacity for restaurants and cafés but this is not at a level which we consider should be reflected in policy, beyond the provision provided for within Blackpool Central.
- 10.64 In this regard, the quantum of floorspace identified is less than the total quantum of vacant floorspace identified across the authority areas' principal centres. Accordingly, we recommend that this floorspace requirement is directed towards the defined centres in order to secure the re-use and repurposing of vacant floorspace and that any proposals will likely come forward on an 'ad hoc' basis.
- 10.65 Commercial leisure continues to be an important element of the overarching offer of centres and is one of the key attractors which draws in footfall both during the daytime and evening.

- 10.66 Therefore, a recognition that such uses play an important role in helping to support the future vitality and viability of centres should be included in planning policy.

## Planning Policy Recommendations

### General Policy Approach

- 10.67 The adopted and emerging local plans promote a 'town centre first' policy approach which is broadly consistent with the general requirements of paragraphs 90 to 95 of the NPPF.

- 10.68 In this regard, we note that paragraph 018 of the Town Centres PPG indicates that proposals for edge and out-of-centre retail and leisure developments should be considered with reference to the health of centres that would be impacted by development. Paragraph 018 states that:

**'A judgement as to whether the likely adverse impacts are significant can only be reached in light of local circumstances. For example, in areas where there are high levels of vacancy and limited retailer demand, even very modest trade diversion from a new development may lead to a significant adverse impact.'**

- 10.69 In this context, it will be important for the emerging plans to clearly set out the importance of the sequential and impact tests and explain the local circumstances which frame how they will be applied in practice. The sequential and impact tests will need to be applied in a robust manner in order to provide for the re-use of vacant units and to support centres which retain a strong retail function as well as a diverse range of other uses. Whilst non-retail uses will be an important component of the mix of land uses in principal centres moving forward, there is still a requirement to accommodate new retailers and secure additional retail floorspace within defined centres wherever possible in accordance with the requirements of the NPPF.

- 10.70 It will be important for the forthcoming plans to clearly identify that the defined centres within the authority areas should remain a focus for both convenience and comparison goods retail and that such uses remain important in driving footfall.

- 10.71 Notwithstanding this, it is evident that fundamental changes in the retail sector – largely resulting from the shift to online retail, which has been accelerated by the Covid-19 pandemic – have had a permanent impact on land use on the high street. As such it is critical that defined centres continue to diversify in order to provide access to jobs, leisure, culture, services, and social connection.

- 10.72 In the context of the current offer of defined centres, and national planning policy requirements, we recommend that emerging plan policies are sufficiently flexible so as to allow for an appropriate range of town centre uses beyond retail, and reflect the need to repurpose historic, sometimes outdated retail stock in order to accommodate new residential, leisure and community uses. To this end, we note that paragraph 90 of the NPPF states that planning policies should:

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

- 10.73 The emerging plans should also consider the effects of the expanded Use Class E and the consequences of the additional flexibility which Class E provides for outside of town centres. The authorities may wish to consider applying restrictive conditions to planning permission for Class E development which is delivered outside of town centres to restrict the authorised use to that which has been justified in the application submission. This

will help ensure that unacceptable impacts do not arise within town centres as a consequence of future Class E development.

## Boundaries

- 10.74 Paragraph 90 of the NPPF requires local plans to **‘define the extent of town centres and primary shopping areas’**.
- 10.75 National planning policy no longer explicitly prescribes the designation of primary and secondary frontages. The Government has confirmed that the removal of this requirement reflects the general need to be flexible in planning for the future of town centres due to the rapid changes taking place in the retail and leisure industries. Whilst the removal of the requirement does not preclude local planning authorities from identifying primary and secondary shopping frontages where supported by local circumstances, we do not believe that this is merited in this instance.
- 10.76 Although, the Study has generally identified low vacancy rates in the two authority areas’ defined centres (excluding Blackpool town centre and Fleetwood town centre), there is nonetheless a need to repurpose and reoccupy floorspace within centres across the authority area in the manner that Use Class E generally provides for. In this context, the separate designation of both primary and secondary frontages would serve no useful purpose
- 10.77 Annex 2 of the NPPF indicates that a primary shopping area is the **‘Defined area where retail development is concentrated’**.
- 10.78 Annex 2 also identifies that a town centre is the:
- ‘Area defined on the local authority’s policies map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in the development plan, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres.’**
- 10.79 Annex 2 further defines main town centres uses as:
- ‘Retail development (including warehouse clubs and factory outlet centres); leisure, entertainment and more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).’**
- 10.80 In this context, it is important to note that, although there is the opportunity to define separate primary shopping area and town centre boundaries, there is no general requirement to do so unless the specific characteristics of the subject centre support such an approach. Government policy specifically encourages the diversification of centres. Whilst retail will (in most cases) be a key element of a town centre, the majority of lower-order centres are diverse and uses are typically distributed throughout the centre. Such centres may not have a particular concentration of retail uses at their core.
- 10.81 Furthermore, it is also important to recognise the purpose of defining both a primary shopping area (PSA) and town centre boundary (TCB). In planning policy terms, distinguishing between the primary shopping area and town centre boundary is of principal merit in terms of identifying the area of relevance in applying the sequential and impact tests to retail development. The particular relevance of the primary shopping area to retail planning proposals is confirmed by Annex 2 of the NPPF.

10.82 The definition of a centre's Primary Shopping Area ('PSA') and Town Centre Boundary ('TCB') is important in retail planning terms in a number of important respects:

- First, for the purposes of plan-making and development management, sites and applications for new retail, leisure and other main town centre uses that are not in an existing centre and not in accordance with an up-to-date Local Plan will be subject to the sequential and impact tests' in accordance with the NPPF (paragraphs 91-95).
- Second, in terms of applying the sequential approach for both plan-making and decision-taking, an edge-of-centre' site is defined for retail purposes by the NPPF (Annex 2) as a location that is —well connected to, and up to 300 metres from, the primary shopping area. For all other main town centre uses, a location within 300 metres of a town centre boundary. For office development, this includes locations outside the town centre but within 500 metres of a public transport interchange. In determining whether a site falls within the definition of edge of centre, account should be taken of local circumstances and preference should be given to —accessible sites that are well connected to the town centre (NPPF, paragraph 92).

10.83 With regard to Blackpool's defined centres, we have reviewed the current boundaries, performance and provision in order to inform our recommendations of where they should sit within the hierarchy. We provide our commentary for Blackpool on a centre-by-centre basis at Table 10.7 below. Copies of the plans showing the existing and proposed boundaries are included at Appendix 7.

**Table 10.7: Summary of Boundary and Hierarchy Recommendations for Defined Centres in Blackpool**

Name	Boundary Recommendations	Hierarchy Recommendations
Blackpool Town Centre	<p>We have reviewed the currently defined boundary for Blackpool town centre and consider that it remains broadly appropriate in defining the area within which main town centre uses are concentrated.</p> <p>With regard to retail uses, specifically, we have also considered the currently defined Primary Shopping Area within the town centre and consider this to be the appropriately defined area within which retail uses are concentrated, in accordance with Annex 2 of the NPPF. We do, however, recommend some small adjustments to the western boundary to ensure consistency with the OS base maps. These changes do not result in any change to the number or range of units included within the Primary Shopping Area.</p> <p>The adopted development plan defines primary and secondary frontages within Blackpool town centre. However, as identified above, we believe that the existing primary and secondary frontages should not be maintained going forward given the provisions of Class E of the Use Classes Order and the Government's general objective that there should be greater flexibility on the high street.</p>	Principal Town centre

Name	Boundary Recommendations	Hierarchy Recommendations
Highfield Road district centre	We do not recommend any changes to the currently defined district centre boundary.	District centre
Waterloo Road (South Shore) district centre	We do not recommend any changes to the currently defined district centre boundary.	District centre
Whitegate Drive district centre	We do not recommend any changes to the currently defined district centre boundary.	District centre
Layton district centre	We do not recommend any changes to the currently defined district centre boundary.	District centre
Bispham district centre	We do not recommend any changes to the currently defined district centre boundary.	District centre

**10.84** With regard to Wyre’s principal centres, we have reviewed the current boundaries, performance and provision in order to inform our recommendations of where they should sit within the hierarchy. We provide our commentary for Wyre on a centre-by-centre basis at Table 10.8 below. Overall, we consider that the town centre and PSA boundaries for Wyre are broadly reflective of the focus of main town centre uses. We do, however, propose some minor changes to the Cleveleys and Poulton town centre boundaries.

**Table 10.8: Summary of Boundary and Hierarchy Recommendations for Principal Centres in Wyre**

Name	Boundary Recommendations	Hierarchy Recommendations
Fleetwood town centre	We do not recommend any changes to the currently defined town centre boundary.	Town centre
Cleveleys town centre	We have reviewed the current defined boundaries for Cleveleys town centre.  We recommend minor extensions to the south and east of the defined primary shopping area to include the Aldi and Sainsbury’s Local supermarkets, as these are main town centre uses and contribute to the wider town centre footfall.	Town centre
Garstang town centre	We do not recommend any changes to the currently defined town centre boundary.	Town centre
Poulton town centre	We have reviewed the currently defined boundaries for Poulton town centre.  We propose an extension of the town centre boundary to include the Poulton Elk pub, which functions as part of the centre and contributes to its evening economy.	Town centre

### Wyre’s District, Local and Neighbourhood Centres

**10.85** Wyre Borough Council has provided us with boundary and composition data in relation to its adopted district, local and neighbourhood centres.

**10.86** The district centre boundaries are mapped in Appendix 7, and the land use composition of the four district centres is set out in Table 10.9 below based on surveys carried out by Council Officers in February and March 2025.

**Table 10.9: Composition of Wyre’s District Centres at February/March 2025**



District Centre	Comparison Units		Convenience Units		Financial & Business Service Units		Leisure Units		Retail Service Units		Vacant Units		Total Units	
	(no.)	(%)	(no.)	(%)	(no.)	(no.)	(%)	(%)	(no.)	(%)	(no.)	(%)	(no.)	(%)
Great Eccleston	1	6.7%	5	33.3%	1	6.7%	5	33.3%	2	13.3%	1	6.7%	15	100.0%
Knott End	7	19.4%	8	22.2%	1	2.8%	7	19.4%	11	30.6%	2	5.6%	36	100.0%
Marsh Mill	4	15.4%	1	3.8%	2	7.7%	11	42.3%	8	30.8%	0	0.0%	26	100.0%
Victoria Road East	5	17.9%	2	7.1%	5	17.9%	8	28.6%	8	28.6%	0	0.0%	28	100.0%

Source: Composition of centres derived from Wyre Borough Council surveys of February and March 2025

**10.87** The table shows that all of the district centres provide for a range of shops and services, and are of a size suitable to serve a localised catchment. Each district centre accommodates at least one national multiple convenience store retailer (Nisa Local in Great Eccleston, Spar in Knott End, Tesco Express in Marsh Mill, and Co-op in Victoria Road East).

**10.88** Based on the information provided by the Council, we are satisfied that each of the Borough's district centres continues to perform a role and function commensurate with its position in the hierarchy and do not recommend any changes in respect of these centres' positions.

**10.89** The land use composition of the Borough's local and neighbourhood centres, as derived from surveys carried out by Wyre Council Officers in February and March 2025, is set out in Table 10.10 below and mapped in the colour-coded plans provided at Appendix 9 to this report.

**Table 10.10: Composition of Wyre's Local and Neighbourhood Centres at February/March 2025**

Centre	Comparison Units		Convenience Units		Financial & Business Service Units		Leisure Units		Retail Service Units		Vacant Units		Total Units	
	(no.)	(%)	(no.)	(%)	(no.)	(no.)	(%)	(%)	(no.)	(%)	(no.)	(%)	(no.)	(%)
<b>Local Centres</b>														
Broadpool Lane	1	14.3%	3	42.9%	0	0.0%	0	0.0%	3	42.9%	0	0.0%	7	100.0%
Broadway	4	28.6%	2	14.3%	0	0.0%	4	28.6%	4	28.6%	0	0.0%	14	100.0%
Castle Gardens	2	11.8%	2	11.8%	1	5.9%	6	35.3%	3	17.6%	3	17.6%	17	100.0%
Catterall*	1	11.1%	1	11.1%	1	11.1%	5	55.6%	1	11.1%	0	0.0%	9	100.0%
Larkholme Parade	0	0.0%	2	22.2%	0	0.0%	3	33.3%	4	44.4%	0	0.0%	9	100.0%
Normoss Road	2	13.3%	2	13.3%	1	6.7%	4	26.7%	5	33.3%	1	6.7%	15	100.0%
<b>Neighbourhood Centres</b>														
Beechwood Drive	0	0.0%	1	25.0%	0	0.0%	1	25.0%	2	50.0%	0	0.0%	4	100.0%
Blackpool Old Road	0	0.0%	1	16.7%	0	0.0%	2	33.3%	3	50.0%	0	0.0%	6	100.0%
Broadwater	0	0.0%	2	28.6%	0	0.0%	3	42.9%	1	14.3%	1	14.3%	7	100.0%
Chatsworth Avenue	0	0.0%	2	25.0%	0	0.0%	3	37.5%	2	25.0%	1	12.5%	8	100.0%
Croston Road	0	0.0%	1	16.7%	0	0.0%	3	50.0%	2	33.3%	0	0.0%	6	100.0%



Hatfield/ Highbury Ave	0	0.0%	1	20.0%	0	0.0%	1	20.0%	2	40.0%	1	20.0%	5	100.0%
Highcross Road	0	0.0%	1	25.0%	2	50.0%	0	0.0%	1	25.0%	0	0.0%	4	100.0%
Lawsons Road	2	16.7%	2	16.7%	0	0.0%	3	25.0%	5	41.7%	0	0.0%	12	100.0%
Linden Avenue	0	0.0%	1	20.0%	0	0.0%	1	20.0%	3	60.0%	0	0.0%	5	100.0%
Manor Road	0	0.0%	2	40.0%	0	0.0%	1	20.0%	2	40.0%	0	0.0%	5	100.0%
North Drive	1	25.0%	1	25.0%	0	0.0%	0	0.0%	2	50.0%	0	0.0%	4	100.0%
Poulton Road	1	7.1%	3	21.4%	0	0.0%	1	7.1%	9	64.3%	0	0.0%	14	100.0%
Rossall Road	6	42.9%	2	14.3%	0	0.0%	4	28.6%	1	7.1%	1	7.1%	14	100.0%

Source: Composition of centres derived from Wyre Borough Council surveys of February and March 2025

\*The local centre at Catterall was proposed in the hierarchy set out in Policy EP4 of the current Wyre Local Plan but not delivered until after its adoption. The local centre has now been completed and is known locally as Beacon Retail Park, Westfield Road. Similarly, the current Local Plan proposes a neighbourhood centre at Forton, but this has not yet been constructed and is therefore excluded from Table 10.10.

**10.90** The table and associated mapping indicate that each of the locations currently designated as neighbourhood centres provide for a range of uses and that they are generally similar in scale, diversity and function to the adopted local centres.

**10.91** The overview plan in Appendix 9 shows the locations of the neighbourhood centres relative to higher order designated centres and the Borough's settlements. Even the smallest neighbourhood centres that serve a more limited function, such as Beechwood Drive and Highcross Road, tend to be located some distance from the defined town and district centres where they can play an important role in fulfilling the day-to-day needs of their local communities by reducing the need for residents to travel for top-up shopping and basic services. Importantly, all of the neighbourhood centres contain at least one convenience operator, typically a small convenience store.

**10.92** In recognition of the uses present and their valuable function for their local communities, we consider that the locations currently defined as neighbourhood centres should be designated as local centres in the centre hierarchy. Such a designation would more accurately reflect their composition and role, as well as ensuring that their vitality and viability is appropriately safeguarded by planning policy.

## Thresholds

**10.93** Paragraph 94 of the NPPF indicates that it is appropriate to identify thresholds for the scale of edge of centre and out-of-centre retail and leisure developments which should be the subject of impact assessment. Any such threshold policy applies to the impact test only (all planning applications for main town centre uses which are not in an existing centre and not in accordance with an up-to-date development plan should be the subject of the sequential test<sup>32</sup>). It is useful to also refer back to what comprises 'edge' and 'out' of centre for the purposes of applying the impact test, as set out at paragraph 10.82 above.

**10.94** The purpose of applying an impact threshold within the development plan which deviates from the national threshold of 2,500 sq.m is to allow the Council to retain appropriate control in respect of the potential for development to impact on the future health of defined centres within the authority area. In applying a lower threshold, applications for developments which could potentially have a harmful effect on the overall vitality and viability of a defined centre, will need to be supported by a proportionate impact assessment which sets out the potential trade diversion impact assumptions.

<sup>32</sup> With the exception (in accordance with paragraph 89 of the NPPF) of small scale rural office proposals and other small scale rural development.

10.95 Paragraph 015 of the Town Centres PPG provides specific guidance in relation to floorspace thresholds and states:

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

- **scale of proposals relative to town centres**
- **cumulative effects of recent developments**
- **whether local town centres are vulnerable**
- **likely effects of development on any town centre strategy**
- **impact on any other planned investment.’**

10.96 Using the above guidance, we set out below the justification to support our view that a lower threshold should be applied across the hierarchy of centres within the authority areas.

10.97 In considering the setting of a local impact threshold, it is relevant to consider the type of development (relating to convenience and comparison goods retail uses, and leisure uses) which would, in practice, provide space for key operators who could help act to ‘anchor’ a centre. Should one of these anchor units or operators leave a centre, it is more likely that there will be the potential for a significant adverse impact to arise.

10.98 Where there is genuine potential for an application proposal to divert a material level of expenditure away from a defined centre, or potentially remove a key tenant from that centre, there will likely be a requirement to consider the impacts arising from the proposal in detail.

10.99 In respect of lower order centres, the introduction of even a small convenience store nearby (of the type operated by Sainsbury’s Local or Tesco Express) may have the potential to impact on the ongoing viability of key operators. Small convenience stores operated by national multiple grocers can generate a relatively substantial turnover. If this is diverted from existing retailers in defined centres, the impact on the overall vitality and viability through the loss of spend and footfall, could be of a significant adverse magnitude.

10.100 Therefore, in implementing a local threshold policy, it is considered more appropriate to apply a range of thresholds in accordance with the type of centre the proposed development is proximate to. The thresholds should not only apply to new floorspace, but also to changes of use and variations of condition to remove or amend restrictions on how units operate or trade in practice.

10.101 We provide our considerations below for each authority separately.

### **Blackpool Impact Thresholds**

10.102 As set out in Section 3 of this report, Policy DM15 of the Local Plan Part 2 sets the current local impact threshold for proposals for retail and leisure development of 500 sq.m gross authority-wide; 300 sq.m gross where the proposal is located within 800m of the boundary of a district centre; and 200 sq.m gross where the proposal is located within 800m of the defined boundary of a local centre.

10.103 It is clear that, although Blackpool town centre is providing a variety of commercial uses for residents within the borough and further afield, the centre consists of a number of smaller-scale units and a higher than average vacancy rate. Accordingly, a proposal amounting to 500 sq.m gross would constitute a significant development in the local context.

- 10.104 Moreover, this Study has identified a number of factors which suggest a need for a reduced impact threshold. We summarise our considerations in this regard below.
- 10.105 Blackpool town centre remains vulnerable to increasing competition from nearby higher order centres and out-of-centre retail parks, including Blackpool Retail Park and Clifton Retail Park, in addition to the broader national trends identified in this report such as the growth in internet shopping and rises in the cost of living. Although considerable work has already, and will shortly be undertaken in the town centre, all of which is going some way to improving the overarching vitality and viability of the centre, the centre still suffers from high vacancy rates and other challenges in terms of long-term vacancies, seasonal fluctuations and a reliance on the leisure industry, along with wider demographic influences.
- 10.106 Modern comparison retailers typically require units with a minimum floorspace of 500 sq.m to 1,000 sq.m gross in order to reach the 'critical mass' needed to display their full range of goods in-store and attract customers from a wide catchment area. Non-food stores of over 500 sq.m gross are unlikely to trade as a purely local facility, particularly in the context of Blackpool given the small size of the vast majority of its commercial stock.
- a. While we recognise that most foodstore formats are provided for across the authority areas, there may be opportunity for retailers to bring forward additional stores in areas likely to be the subject of significant residential growth, particularly the smaller local convenience store formats such as Sainsbury's Local.
  - b. Blackpool's foodstores help to underpin its function as a day-to-day shopping destination, drawing in custom and encouraging linked trips to the other parts of the town centre. Should the viability of these stores be impacted, there is a real risk of the role of the wider centre being undermined. There are very few larger units than 500 sq.m within the town centre.
  - c. With regard to leisure developments, the recommendation is again reflective of average unit sizes and the need to safeguard the vitality and viability of the town centre without unnecessarily stifling development.
- 10.107 Accordingly, in the local context, 500 sq.m constitutes a significant unit with the potential to result in an impact on shopping patterns.
- 10.108 The above recommendation is also reflective of the town centre vacancy rates and the potential for out of centre retail developments to become even stronger in the future at the expense of centres' vitality and viability. The existing out of centre commercial destinations all offer a range of comparison goods, which traditionally would have been sold from town centres. As such, the recommendation is reflective of the need to safeguard against the out of centre retail destinations becoming even stronger at the expense of the health of defined centres.
- 10.109 Thus, we recommend that a 500 sq.m impact threshold should continue to effectively act as a default to be applied authority-wide (and thus including to applications outside but proximate to the town centre), should a proposal not be subject to a lesser threshold of relevance to smaller centres for retail and leisure uses. The thresholds should not only apply to new floorspace, but also to changes of use and variations of condition to remove or amend restrictions on how units operate or trade in practice.
- 10.110 It is important to emphasise that, whilst the locally set threshold would require the submission of an impact assessment for all edge-of-centre and out-of-centre developments exceeding the thresholds, national guidance states that the impact test should be undertaken in a proportionate and locally appropriate way, commensurate to the scale of development proposed. The level of detail would typically be agreed with Planning Officers

during the pre-application process in order to avoid overly onerous requirements that may otherwise restrict and delay development opportunities from coming forward.

- 10.111 In the district centres, which also primarily comprise small-format units and which tend to support a relatively low number of anchor tenants with limited turnover, we agree that the currently adopted impact threshold of 300 sq.m remains of relevance.
- 10.112 Blackpool's local centres are often underpinned by small format grocery stores (effectively little more than a 'corner shop' in terms of their format). In most cases, these retailers underpin the function of local centres, drawing in custom and encouraging linked trips to the other parts of the centre. Should the viability of such stores be impacted, there is a real risk of the role of the wider centre being undermined. The loss of an occupier of such importance could have a significant adverse impact on the centre as a whole. Given the character of such operators and their importance to local centres, we recommend that an impact threshold of 200 sq.m is applicable to retail and leisure proposals in proximity to the local centres.
- 10.113 Where an application proposal is above the respective stated impact threshold, we would recommend that the applicant discusses and agrees the scope of the retail impact assessment with the Council prior to submission. The lower threshold of 200 sq.m for the smallest defined centres is considered appropriate due to potential for convenience stores of even a relatively small nature to substantially impact upon the performance of existing operators, due to the potential higher sales densities of such proposals. This would ensure that particular protection of these smaller centres is considered appropriately.
- 10.114 To summarise, we are of the view that an impact assessment will be necessary to accompany proposals for retail and leisure uses (including those relating to mezzanine floorspace and the variation of restrictive conditions) which are not located within a defined centre where:
- the proposal provides a gross floorspace in excess of 500 sq.m gross; or
  - the proposal is located within 800 metres of a district centre and is in excess of 300 sq.m gross; or
  - the proposal is located within 800 metres of a local centre and is in excess of 200 sq.m gross.

### Wyre Impact Thresholds

- 10.115 Within Wyre, the currently adopted policy EP5 sets a local impact threshold of 500 sq.m gross for new retail floorspace and retains the NPPF default threshold of 2,500 sq.m gross for new leisure proposals. Proposals affecting Fleetwood town centre are required to demonstrate that they will have no 'unacceptable impact'; whereas, for all other centres, Policy EP4 require applicants to demonstrate that there is no 'significant adverse impact' on vitality and viability. The latter phrase mirrors the language used in the NPPF.
- 10.116 We have reviewed the position in terms of the vacancy rates, average unit sizes and nature of the town centres within Wyre and consider that the currently adopted local impact threshold is too high. In this regard, we note that the average size of units within the town centres fall below 200 sq.m, in each of the centres and that the proportion of units over 300 and 500 sq.m within each centre is relatively low.
- 10.117 We also note that:
- Fleetwood town centre remains vulnerable to increasing competition from nearby higher order centres and out-of-centre retail parks, in addition to the broader national trends identified in this report such as the growth in internet shopping and rises in the cost of living. The centre has a high vacancy rate and due to its location and qualitative nature in terms of average unit sizes and historic formats, is particularly

susceptible to retail and leisure impacts. Should edge or out of centre development come forward even below 500 sq.m, there is a potential for this to jeopardise the future performance of the centre.

- The other three centres, although benefit from a lower than average vacancy rate, are typically made up of smaller-format units with an average floorspace of below 300 sq.m. Again, although performing better against the healthcheck indicators, they are important facilities for local residents and could be vulnerable to out of centre development over 300 sq.m.
- While we recognise that most foodstore formats are provided for across the authority area, there may be opportunity for retailers to bring forward additional stores in areas likely to be the subject of significant residential growth, particularly the smaller local convenience store formats such as Sainsbury's Local. Wyre's foodstores help to underpin the town centres' functions as a day-to-day shopping destination, drawing in custom and encouraging linked trips to the other parts of the town centre. Should the viability of these stores be impacted, there is a real risk of the role of the wider centre being undermined.
- With regard to leisure developments, the recommendation is again reflective of average unit sizes and the need to safeguard the vitality and viability of the town centre without unnecessarily stifling development.

**10.118** Accordingly, in the local context, 300 sq.m constitutes a significant unit with the potential to result in an impact on shopping patterns. We therefore recommend that the local impact threshold is lowered to 300 sq.m for both retail and leisure development in the context of the town and district centres.

**10.119** For the purpose of drafting future planning policy, it is important to qualify the area to which each local impact threshold will apply. By way of a reminder, the local impact threshold applies to all retail and leisure development located outside of a defined centre and that the 800 metre radius referenced below simply determines the relevant threshold to apply. Again, referring to paragraph 10.82 above, 'the centre' for the purposes of retail and leisure developments differs where a primary shopping area is defined (for retail developments, the primary shopping area is the defined centre and for leisure developments, the wider town centre is the defined centre).

**10.120** We recommend that the lower impact thresholds would be applicable within 800 metres of the boundary of the relevant centre (again referring to the primary shopping area (where defined) for retail purposes, and the wider town centre for leisure uses). The distance of 800 metres is broadly commensurate with the potential walk-in catchments of smaller centres and is identified by Guidelines for Providing for Journeys on Foot (The Institution of Highways & Transportation, 2000) as being the 'preferred maximum' acceptable walking distance to a centre. We consider it to be appropriate for the higher threshold of 300 sq.m to apply authority-wide (i.e. beyond 800 metres of these centres), due to the lesser likelihood of significant adverse impacts being concentrated on one centre when the development is more distant.

**10.121** It is important to emphasise that, whilst the locally set threshold would require the submission of an impact assessment for all developments located outside of the defined centres exceeding the thresholds, national guidance states that the impact test should be undertaken in a proportionate and locally appropriate way, commensurate to the scale of development proposed. The level of detail would typically be agreed with Officers during the pre-application process in order to avoid overly onerous requirements that may otherwise restrict and delay development opportunities from coming forward.

**10.122** In our experience, it will only generally be development of a scale greater than these thresholds which could lead to a 'significant adverse' impact, which could merit the refusal of an application for retail and leisure uses in accordance with the provisions of paragraph 95 of the NPPF. The setting of a 'tiered' threshold is consistently

accepted by Inspectors at Local Plan Examination and, in our view, acts to appropriately ensure that only those proposals which could genuinely result in an unacceptable impact are the subject of an impact assessment.

**10.123** Similarly to the analysis provided above for Blackpool, Wyre's local centres are often underpinned by small format grocery stores (effectively little more than a 'corner shop' in terms of their format). In most cases, these retailers underpin the function of local centres, drawing in custom and encouraging linked trips to the other parts of the centre. Should the viability of such stores be impacted, there is a real risk of the role of the wider centre being undermined. The loss of an occupier of such importance could have a significant adverse impact on the centre as a whole. Given the character of such operators and their importance to local centres, we recommend that an impact threshold of 200 sq.m is applicable to retail and leisure proposals in proximity to the local centres (i.e within 800m of the centre boundary).

**10.124** Where an application proposal is above the respective stated impact threshold, we would recommend that the applicant discusses and agrees the scope of the retail impact assessment with the Council prior to submission. The lower threshold of 200 sq.m for the smallest defined centres is considered appropriate due to potential for convenience stores of even a relatively small nature to substantially impact upon the performance of existing operators, due to the potential higher sales densities of such proposals. This would ensure that particular protection of these smaller centres is considered appropriately.

**10.125** To summarise, we are of the view that an impact assessment will be necessary to accompany proposals for retail and leisure uses (including those relating to mezzanine floorspace and the variation of restrictive conditions) which are not located within a defined centre where:

- the proposal provides a gross floorspace in excess of 300 sq.m gross;
- the proposal is located within 800 metres of a town or district centre and provides a floorspace in excess of 300 sq.m; or
- the proposal is located within 800 metres of a local centre and is in excess of 200 sq.m gross.

**10.126** Based on the above, we provide a summary table below which provides the recommendations.

**Table 10.11: Summary of Impact Threshold Recommendations**

Closest Defined Centre	Retail Impact Threshold	Leisure Impact Threshold
Further from 800m from any defined centre	300 sq.m	300 sq.m
Within 800 metres of a <b>Town Centre</b>	300 sq.m	300 sq.m
Within 800 metres of a <b>District Centre</b>	300 sq.m	300 sq.m
Within 800 metres of a <b>Local Centre</b>	200 sq.m	200 sq.m

**Notes:** For retail purposes, the centre comprises the primary shopping area (where defined) and the wider town centre boundary where no PSA is defined. For leisure uses, the centre always comprises the wider town centre boundary (see Annex 2 of the NPPF).

**10.127** We also note the Council's current adopted policy EP7 which allows for the provision of local convenience stores without the need to demonstrate compliance with the sequential and impact policy tests. The policy provides a series of criteria, which seek to ensure that the store is of a local scale (280 sq.m net sales), that there are no available existing commercial units within a reasonable walking distance and that there are no other shopping facilities providing for a local need within a reasonable walking distance.

**10.128** We acknowledge the general thrust and aspirations of the currently adopted policy, however and on the basis of the analysis provided above, we do not recommend that such developments do not have to demonstrate

compliance with the sequential and impact policies. In this regard, even small scale convenience operators such as a Tesco Express, Sainsbury's Local or so on could have an adverse impact on smaller defined centres. As such, it is recommended that such proposals would need to demonstrate compliance with the policies as required.

- 10.121 However, the NPPF is clear at paragraph 93 that the sequential approach should not be applied to applications for small scale rural offices or other small scale rural development, which could be supported in the new local plan. This could be in line with the current Policy EP8 of the Wyre Local Plan, but at a scale which is lower than that currently allowed under Policy EP7.

## Appendix 1 – Study Area



## Appendix 2 - Household Survey Results

## Appendix 3a – Wyre Town Centre Healthchecks

## Appendix 3b – Blackpool Town and District Centre Healthchecks

## Appendix 4 – In-Street Survey Results

## Appendix 5 – Quantitative Retail Tables

## Appendix 6 – Quantitative Leisure Tables

## Appendix 7 – Proposed Town and District Centre Boundaries

## Appendix 8 – Plan of Existing Supermarkets in Study Area



## Appendix 9 – Wyre Local and Neighbourhood Centre Plans

Nexus Planning

[nexusplanning.co.uk](http://nexusplanning.co.uk)