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Blackpool, Fylde and Wyre Borough Councils

Fylde Coast Retail Study

Volume 3: Detailed Health Check Reports

Final Report August 2011

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CONTENTS

APPENDICES

1 INTRODUCTION

Policy Context

1.1 PPS4 (Planning for Sustainable Economic Growth) requires that LPAs should use their annual monitoring reports to keep the vitality and viability of their centres under review. This will inform consideration of the impact of policy and planning applications at the local level.

1.2 Moreover, PPS4 makes it clear that LPAs should proactively plan to promote competitive town centre environments and provide consumer choice by:

- supporting a diverse range of uses;
- planning for a strong retail mix;
- supporting small scale economies;
- identifying sites for development where such a need has been identified;
- retaining and enhancing existing markets; and
- taking measures to conserve and enhance the character and diversity of their town centres.

1.3 Policy EC9 of PPS4 stipulates the requirement to measure the vitality and viability and monitor the health of their town centres over time; this is intended to inform judgments about the impact of policies and development. In doing this, PPS4 advises that local authorities should regularly collect market information and economic data, preferably in cooperation with the private sector, on the key indicators set out in Annex D of PPS4. In addition to an extra indicator assessing the movement of the centres in the National Retail Rankings, the key indicators set out in PPS4 are detailed below.

The PPS4 Indicators

1.4 Wherever possible, we have analysed each centre's performance using time-series data, which is more useful than presenting current data, as this can simply present a 'snap-shot' picture of the health of a centre. Where possible, we have also sought to compare the performance of Blackpool Town Centre, against the comparator centres of Preston and Blackburn.

1.5 The health check exercise that we have undertaken serves two purposes: it informs the assessment of impact in the retail sector, as detailed in Policy EC16.1 of PPS4; and it will provide the base position for future monitoring of town centre vitality and viability, as required by EC9 of PPS4

1. Movement in the National Retail Rankings

1.6 We have charted the movement in the national (UK) retail rankings experienced by the Fylde Coast study centres, as shown in Table 1 of Appendix 2, using time-series data from Management Horizons Europe's (MHE) *UK Shopping Index* (for the years 2000/01, 2003/04, and 2008).

1.7 The 2008 version of the MHE Index is based on a weighted count of retailer presence by location, which considers anchor stores, speciality stores, service operators, supermarkets, out-of-town formats and factory outlets. Anchor stores, such as John Lewis, Marks & Spencer and Debenhams, are given a higher score than other multiple operators in order to reflect their major influence on non-food shopping patterns. Thus, for example, the presence of a Debenhams store would provide a centre with 10 points and a Primark store is worth 7 points.

1.8 The MHE 2008 Index also for the first time scores restaurants, coffee shops and high street food outlets (for example, McDonalds, Starbucks and Greggs). As a result of this change to the scoring, it is not appropriate to compare a centre's absolute score in MHE's 2008 Index with those in previous Indexes. However, the relative rankings can generally still be usefully compared.

1.9 It is also worth noting that whereas MHE's 2003/04 Index ranked the UK's top 1,672 retail centres, its 2008 Index now considers some 6,720 centres in the UK. Caution, therefore, needs to be exercised in considering slippage in the retail rankings of low-ranked centres (particularly local centres) between 2003/04 and 2008, which might in part be due to the greater number of centres included in the different Indexes, rather than a particular deterioration of the centres' retail offer.

1.10 The MHE Index is based on the presence of national multiple outlets, with no credit given for the presence of independent operators. This, analysis of a centre's movement in the national retail rankings can be a rather blunt tool, and so other indicators – which consider the presence and quality of independent operators – are also of utility in the case of centres which contain few multiple outlets.

2. Diversity of Main Town Centre Uses (by Number, Type and Amount of Floorspace)

1.11 PPS4 advises that LPAs should monitor the amount of space in use for different functions, such as offices; shopping; leisure, cultural and entertainment activities; pubs, cafés and restaurants; and hotels.

1.12 The standard source of data on the diversity of retail uses in larger town centres is Experian's Goad Centre Reports. For all the centres, we have updated the October 2009 GOAD data with our own land use audits of the centres, undertaken in February and March of 2011 so as to identify the number and percentage of units within each sub-category. Table 1.1 also sets out a summary of the floorspace devoted to retail and service units within each centre, and is derived from the October 2009 GOAD surveys.

Table 1.1 Floorspace Composition of Study Centres[1] (sq.m)

Centre	Convenience	Comparison	Service	Vacant	Total
Blackpool	8,430	63,850	21,190	15,880	**109,350**
St Annes	5,340	17,510	11,340	4,430	**38.620**
Lytham	3,130	9,750	8,520	3,010	**24,410**
Kirkham	3,770	4,510	2,970	690	**11,940**
Cleveleys	4,160	23,500	9,210	3,080	**39,950**
Fleetwood	13,830	11,300	7,470	4,540	**37,140**
Garstang	5,510	4,480	3,180	1,230	**14,400**
Poulton-le-Fylde	3,110	5,730	6,130	830	**15,800**

3. Amount of Retail, Leisure and Office Floorspace in Edge-of-Centre and Out-of-Centre Locations

1.13 Without detailed survey work, it would be difficult to identify the amount of existing retail floorspace in edge- and out-of-centre locations across Fylde Coast. Thus, for a strategic study of this nature, we have only undertaken an assessment of the three main out of centre retail destinations:

- Clifton Retail Park;
- Blackpool Retail Park; and
- Freeport Shopping Village, Fleetwood.

4. The Potential Capacity for Growth or Change of Centres in the Network

1.14 We have undertaken on-foot surveys of each centre to identify physical opportunities for town centre uses.

5. Retailer Representation and Intentions to Change Representation

1.15 MHE categorises fashion retailers as ‘luxury’, ‘upper’, ‘upper-middle’, ‘middle’, ‘lower-middle’ or ‘value’. In its 2008 Shopping Index, MHE assigns an overall rating for each strategic centre, based on the predominant type of fashion retailer that is currently represented.

1.16 In terms of potential retailer interest, the commercial organisation, FOCUS, collects data on documented retailer requirements (for national multiple operators), and publishes the data twice-yearly. FOCUS also produces Town Reports for main centres, which include time-series data on the number of retail requirements. The centres for which FOCUS produces Town Reports are Blackpool Town Centre, Fleetwood Town Centre and Lytham St Annes.

1.17 In relation to levels of operator demand for the study centres, it is important to note that the level of demand for any centre is always influenced by whether any new development is

[1] Data is not available for the following centres: Bispham, South Shore and Thornton

proposed; hence if a major new development scheme was to emerge, the number of requirements would be expected to show a noticeable increase.

1.18 Moreover, our own observations and experience reveal two recurring themes with regard to retailer requirements, namely:

- that in the context of the current uncertain economic climate, a large number of operators are no longer looking to expand, hence, if there is limited operator interest in any of the study centres, this may not necessarily be symptomatic of the decline of that particular centre, but could in fact be as a result of wider macroeconomic instability; and
- the highest demand for space in the study centres is from large supermarket operators, however such operators all face problems with regard to expansion; that is a lack of suitable and available space in locations which are sequentially preferable in planning policy terms.

1.19 Given the unstable economic climate at the time of writing, and the increase in retailers choosing to close stores, in a small number of cases, our assessment of the diversity of uses and the vacancy rate of the town centre may have altered slightly. However, this does not affect our overall conclusions in relation to any of the centres given that such changes are small and temporary when considered against the trends in the health of a centre that occur over longer periods of time, and are more representative of a centre's overall health and performance.

6. Shopping Rents and Yields

1.20 Analysis of rents and yields provide a valuable indication of the viability of a town centre, however they must be used with care. The increase of new shop property in an expanding town may be considered to limit the opportunity for rental growth. Thus the yield in a fast growing town where new shops keep pace with demand (eg. a New Town) might be higher than a more slowly growing town where development is constrained (eg. an historic town). Similarly, yields may rise in the short term following a major town centre shopping development.

1.21 Factors which affect yield are therefore complex, and need to be interpreted with reference to the circumstances in each individual town. Moreover, the level of yield on its own is of less value than in comparison with other yields at different points in time and in different locations. Yields measured consistently over time can give an indication of the direction in which a particular town centre is moving. Broadly speaking, however, low yields indicate that a town is considered to be attractive and as a result be more likely to attract investment than a town with high yields.

7. Proportion of Vacant Street Level Property

1.22 The standard source of vacancy data for larger centres is Experian's GOAD Centre Reports. For all of the study centres we have used the data from our own land use audits, undertaken in February and March of 2011.

1.23 When assessing vacancy levels and where the relevant data is available we have endeavored to consider the following:

- the proportion of floorspace in addition to the number of vacant units;

- what proportion of the vacant units are in the primary shopping area;
- whether there are any concentrations of vacancies;
- the quality of the vacant floorspace and the scope for redevelopment of the floorspace for non-retail uses;
- how vacancy rates in similar centres in the retail hierarchy compare; and
- where possible, how long the units have been vacant and the speed of the 'churn' of the vacant units.

Understanding Vacancies

When assessing centres with high vacancy levels, it is important to consider the reasons why this is occurring. High vacancy rates in a centre could be a result of any of the following factors:

- structural failings in the town centre;
- the wider impacts of the recession on town centres;
- as a result of redevelopment in a particular area of the centre, thereby altering the centre of gravity within the town;
- due to commercial reasons, for example lease renewals;
- a lack of retailer demand; or
- as a result of units which are unfit for purpose, and a lack of modern, more efficient units.

Through understanding the reasons behind high vacancy levels, the Council and its partners will be better equipped to deal with vacant town centre units

8. Land Values

1.24 We do not have access to data on land values in any of the Fylde Coast study centres, and so we do not provide commentary in relation to this PPS4 indicator.

9. Pedestrian Flows (Footfall)

1.25 We have not undertaken our own formal pedestrian flow surveys, however when undertaking our own centre visits in November 2010 and February 2011, we were able to get a good indication of how healthy the centres were in terms of pedestrian flows.

10. Accessibility

1.26 Accessibility is a key feature of a healthy centre, consequently, if we identified any particular accessibility issues when we undertook our on-foot surveys of the centres, then appropriate commentary is provided in the relevant performance analysis.

11. Customer and Residents' Views and Behaviour

1.27 A survey of pedestrians and/or local residents was not undertaken as part of this study and so we have not collated any survey evidence in relation to attitudes, perceptions, desires and so on. The telephone survey of households does, however, provide evidence of current shopping patterns; the findings from the telephone survey are written up in Section 5 of the main report.

12. Perception of Safety and Occurrence of Crime

1.28 Given a lack of data at a local level, and in light of the fact that any perception of safety and crime which we have attained from our centre visits is purely subjective, in order to prevent the 'mislabeling' of areas we have not included this indicator in our assessment of the study centres.

13. State of the Town Centre Environmental Quality

1.29 Under this indicator we provide an assessment of the physical appearance of the centres, based on our field visits in November of 2010 and February of 2011.

2 PERFORMANCE ANALYSIS

Blackpool Borough

Blackpool Town Centre

Movement in the National Retail Rankings

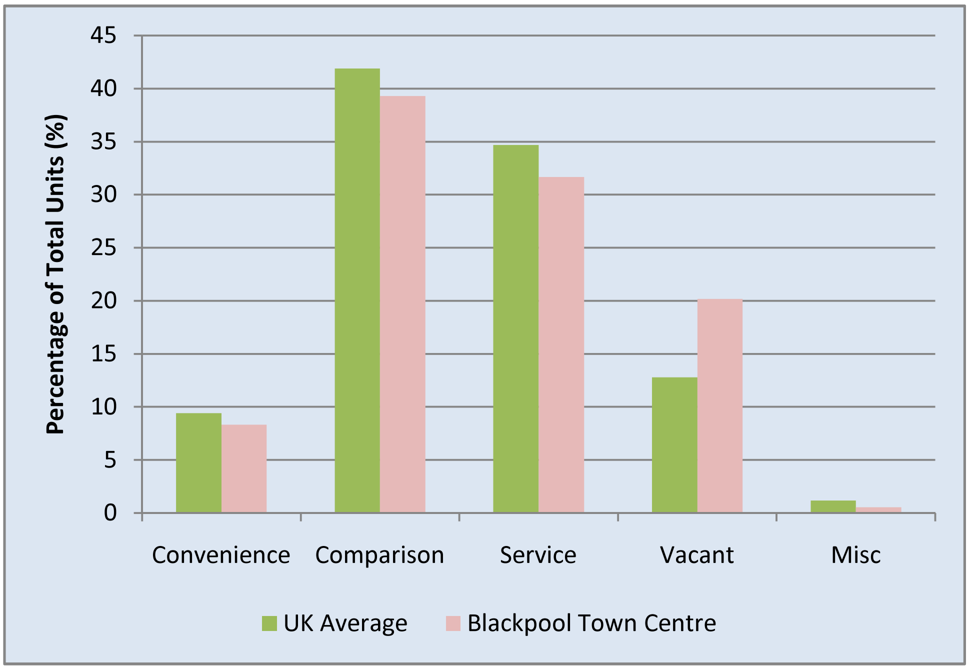
2.1 Table 1 of Appendix 1 identifies the change in Blackpool's national ranking, revealing that since 1995 the town centre has fallen by a total of 41 places to its 2008 position of 98th. More recently, however, the fall in rankings has not been as steep; Blackpool dropped just nine places since 2003, and whilst this is still a cause for concern, it would appear that the decline may be starting to slow down.

2.2 Nevertheless, whilst Blackburn's 2008 position in the rankings is lower at 141st, this centre has only slipped 11 places since 1995. Similarly, Preston, which was ranked 42nd in 2008, has maintained the same position. When we consider that in the same period, Blackpool fell by 41 places, and that all three centres are positioned in the same tier within the regional hierarchy, it would seem that Blackpool is underperforming in relation to its regional comparators.

Diversity of Main Town Centre Uses

2.3 Table 1 of Appendix 1 provides a detailed breakdown of the diversity of main town centre uses within Blackpool Town Centre, with a summary provided in Table 2.1 and Chart 2.1 below. The 47 convenience units in Blackpool in March 2011 accounted for 8 per cent of total units within the centre, with particularly strong representation in the subcategories of *'bakers'* (15 units) and *'confectioners, tobacconists, newsagents'* (16 units). Nevertheless, the findings of our land use audit reveals that the convenience offer is characterised by a number of small, low end convenience retailers such as Iceland and Cool Trader. Indeed, the convenience offer in Blackpool is predominantly focused towards the lower end of the market, and is fairly limited in range.

Chart 2.1 Blackpool Town Centre Diversity of Uses



2.4 Comparison goods units in Blackpool account for 39 per cent of total units within the town centre; this is considered to be a reasonably healthy proportion, and is only slightly below the UK average of 42 per cent. Indeed, we note particularly strong representation in the important clothing subcategory , with Blackpool benefitting from 61 such retailers. Nevertheless, as we note further on in our report, the quality of the retailer representation within this sub-category is poor, and generally low value.

2.5 We note, also, a high proportion of units within the *'charity shops, pets and other comparison'* sub-category, with 30 such units accounting for 5.31 per cent of total units in the town centre; this is an increase on the figures for October 2009, when 26 units in this sub-category were recorded, equating to 4.45 per cent of total retail and service units in the centre.

2.6 Indeed, our own observations of the town centre in November of 2010 and February/March of 2011 indicate a growing proportion of charity shops and discount retailers occupying units on the traditional shopping streets such as Bank Hey Street and Victoria Street, where, following the opening of the Houndshill Shopping Centre in 2008, many national retailers relocated from, so that immediately outside the confines of the Houndshill Centre, discount shops, charity shops and vacancies are prevalent.

Table 2.1 Summary of Diversity of Uses in Blackpool Town Centre at March 2011

Sector	Number of Units	Percentage of Total Units (%)	
		Blackpool	**National Average**
Convenience	47	8.32	9.41
Comparison	222	39.29	41.90
Service	179	31.68	34.70
Vacant	114	20.18	12.80
Miscellaneous[2]	3	0.53	1.19
TOTALS	**565**	**100.00**	**100.00**

2.7 Service uses in Blackpool account for 32 per cent of total units, and as one would expect for a town with a strong visitor economy, there is healthy representation from units within the *'restaurants, cafés, coffee bars, fast food and take away'* subcategory; indeed, there are 107 such units, which collectively account for 19 per cent of total town centre units, and this is above the UK national average of around 14 per cent.

Photos 1 and 2 Modern Retail Stock in Houndshill

The Potential Capacity for Growth or Change

2.8 In the comparison retail sector,, the opportunities presented by the Houndshill Phase II extension, the Central Station Site, and the Winter Gardens redevelopment, all present opportunities to enhance the comparison goods offer through growth and change.

2.9 Talbot Gateway also presents an opportunity for the growth of the town centre, although the Council should ensure that any comparison floorspace promoted as part of this scheme, does not undermine the existing town centre offer, either through the flooding of the market or the over-extension of the retail core. Talbot Gateway will secure regeneration to the north eastern edge of the town centre, an area which is currently characterised by underutilised land and buildings, and which makes for an unwelcoming entrance to the

[2] Miscellaneous retail and service uses include bookmakers and post offices.

town centre for visitors. The scheme will predominantly comprise civic, convenience retail uses, hotel and parking within a high quality public realm, and thus in retail terms, will seek to fill the qualitative gap that has been identified in the town centre in terms of foodstore provision.

2.10 Moreover, the Council has now acquired the Tower Buildings and Winter Gardens, and it is likely that the most viable scheme would be one which incorporated the further extensions to Houndshill, with the redevelopment of the Winter Gardens for comparison retail. It is thought that such a scheme is likely to come forward post 2015, however, at present, the likely scale and form of the retail element of the scheme is unknown.

2.11 Central Station also offers a significant development opportunity; however it is likely that a scheme will comprise predominantly leisure uses, with ancillary supporting comparison retail to strengthen links between this site and the existing town centre; indeed, this site lies within the town centre boundary, as proposed in the Core Strategy Preferred Option April 2010.

2.12 Further opportunities for redevelopment in the town centre should focus on the consolidation and refurbishment of existing units which are not currently fit for purpose, and which detract from the current retail offer. Where appropriate, the Council should consider the refurbishment of vacant retail units for more viable uses to prevent the oversupply of retail floorspace as more modern and efficient units are provided through the further extension of the Houndshill Centre.

Retailer Representation and Intentions to Change Representation

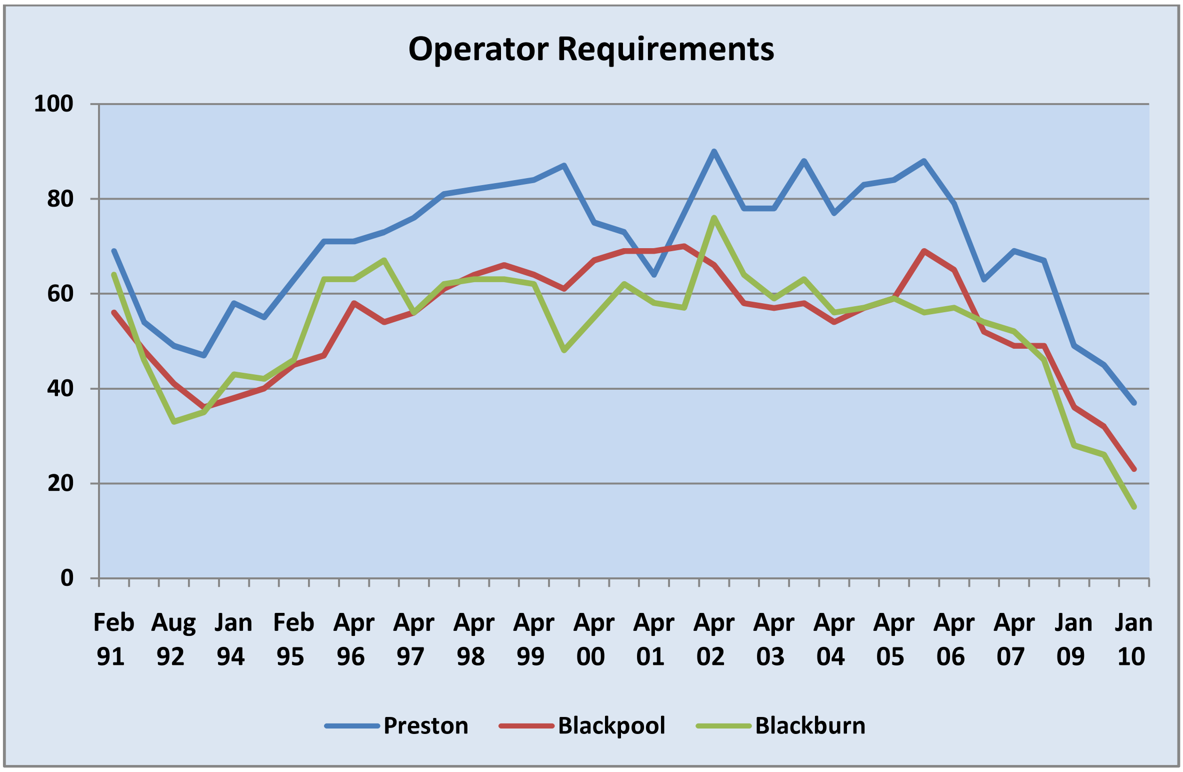
2.13 Blackpool's representation of national comparison operators, is somewhat limited, predominantly catering for lower end of the spectrum in terms of the quality of the offer. Indeed, Blackpool attains an overall classification of *'middle'* for fashion in MHE's 2008 Index, with 35 per cent of retailers falling within this category, 20 per cent falling within the *'lower middle'* category, and 13 per cent falling within the *'value'* category.

2.14 This is reflected in the type of retailers represented, with stronger representation from discount retailers such as Shoe Zone, Mark One and Ethel Austin. Nevertheless, the Houndshill Shopping Centre, extended in 2008, provides modern, purpose built units, and this has led to an expansion and qualitative improvement of the retail offer in Blackpool, with representation from high street retailers such as River Island and New Look, who relocated from Bank Hey Street, in addition to new representation from H&M and a large Debenhams department store.

2.15 In addition to Debenhams, other major anchor retailers include Next, BHS and Marks and Spencer. In total, there are 98 national comparison retailers in Blackpool, as recorded at the time of our audit of the centre in March 2011; this equates to 44 per cent of all comparison retailers in the town centre. The remaining retailers are all categorised as independent outlets, or smaller chains, the majority of which are of middle to lower quality.

2.16 In relation to intentions to change representation, Graph 2.1 provides time-series data for the number of operator requirements posted for Blackpool Town Centre, and comparator centres, since 1991, and whilst some of the requirements posted are general requirements (i.e. posted nationally, or for a region as a whole, as opposed to a specific centre), this data provides us with a broad indication of trends in operator interest in the centre.

Graph 2.1 Operator Requirements for Blackpool Town Centre 1991 – 2010 vis-à-vis Comparator Centres.



Source: FOCUS Town Reports

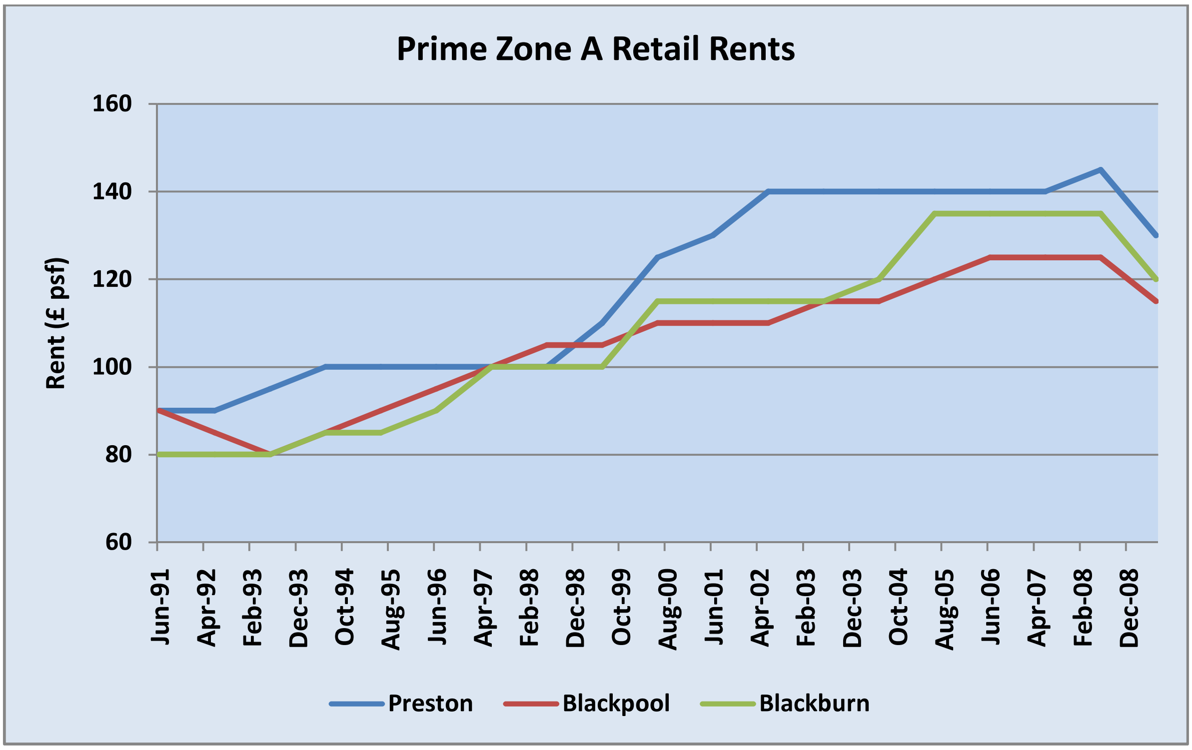
2.17 Graph 2.1 indicates that in Blackpool the number of operator requirements has fluctuated, falling during the last recession of 1991, and more recently and notably since 2006. Indeed, the latest figures for Blackpool – 23 published requirements in January 2010 – represent the lowest ever levels of interest in the town centre. Whilst this is mostly due to the impact of the recession (as evidenced by the decline in operator requirements also occurring in Preston and Blackburn), and by requirements being satisfied by recent development such as the Phase I Houndshill extension, it is in part symptomatic of the wider decline of Blackpool Town Centre in recent years in relation to other, more attractive neighbouring centres such as Preston.

Shopping Rents and Yields

2.18 Zone A rents in Blackpool Town Centre averaged £115 per sq.ft in 2009, and have been rising steadily since 1987 when Zone A rents were £70 per sq.ft. Indeed, we note that there has only been two years in which rental values have decreased; between 1991 and 1993, and more recently between 2008 and 2009. In both instances, the decline in retail rents will most likely be attributable to wider difficulties in the economy.

2.19 Nevertheless, retail rents in Blackpool remain the lowest when compared to neighbouring towns such as Preston and Blackburn, despite both centres also having experienced decline in retail rental values. Indeed, in 2009, equivalent retail rents in Preston stood at £130 per sq.ft and those in Blackburn stood at £120 per sq.ft.

Graph 2.2 Prime Zone A Retail Rents



Source: Colliers CRE/ FOCUS Town Reports

2.20 Whilst yields in Blackpool increased (worsened) to an all time high of 6.50 per cent in 2002, values steadily decreased to 5 per cent in 2008. This is an encouraging trend, and is an indication that investor confidence in the centre is strengthening. Moreover, yields in Blackpool, when compared to those in Preston and Blackburn, are the lowest (best), with comparable values in Preston and Blackburn of 5.50 per cent and 7 per cent respectively.

2.21 We note, however, that whilst yields improved in Blackpool between 2002 and 2008, indicating improved investor confidence in the centre, Graph 2.1 demonstrates that operator requirements have fallen in the same period. This is most likely due to requirements being satisfied by developments such as Houndshill, and the wider economic decline that has led to retailers scaling back operations, and putting expansion plans on hold.

2.22 Moreover, caution should be taken when interpreting yields, as strengthening values do not represent a sole indication of investor confidence in a town centre, and other factors should be taken into account. Indeed, in reality, investor and developer confidence in Blackpool is limited, unless it is supported by large levels of public sector pump priming.

Proportion of Vacant Street Level Property

2.23 There were 114 vacant units in Blackpool Town Centre in March 2011, which equates to a vacancy rate – as measured by the total proportion of retail and service units – of almost 20 per cent; this is somewhat higher than the UK average[3] in 2011 of 12.8 per cent. We note, however, that the vacancy rate has fallen very slightly from 21 per cent, as recorded at the time of the GOAD survey in October 2009.

2.24 Nevertheless, this improvement should not necessarily be seen as positive, as many of the recently occupied vacant units have been taken up by discount retailers and charity shops, so that the nature of the retail offer in Blackpool Town Centre has declined. Indeed, research[4] indicates that in 2010, five new pound shops and four new charity shops opened in Blackpool Town Centre.

2.25 Moreover, the findings of our land use audit indicates that prominent concentrations of vacancies remain throughout the town centre, most notably along Victoria and Bank Hey Street, both of which are located in the core shopping area. Moreover, we note that there are two large and prominent vacant units in the Houndshill Centre adjacent to Debenhams, which detract from the quality of the core town centre retail environment.

Photos 3 and 4 Prominent Vacancies Located in the Retail Core

2.26 In secondary areas, such as along Talbot Road, vacancies are equally prevalent, reinforcing the need for the Council to consider the consolidation of the town centre, and the refurbishment of vacant retail units located in secondary areas for more viable uses. Indeed, this will ensure that when new and modern retail floorspace is provided, it does not dilute the existing offer which is currently characterised by an oversupply of poor quality retail units.

2.27 Encouragingly, however, our observations of the town centre indicate that whilst some previously vacant units have been occupied by lower end retailers, there are several that

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[3] The UK average vacancy rate of 12.8 per cent in 2011, is an average provided by Experian GOAD, and derives from all centres in the UK. Caution should therefore be taken when comparing with the UK average, as this can be a somewhat crude measure of whether vacancies are a cause for concern.

[4] Research published by the Local Data Company

have been taken by national multiples such as TJ Hughes and Nandos. Moreover, we are further encouraged by indications that Co-Op food and Pandora are planning to open units within the centre.Pedestrian Flows (Footfall)

2.28 We have not undertaken our own formal assessment of pedestrian flows; however, our own observations reveal that footfall is highest in the Houndshill Centre

2.29 This would support the view that the redevelopment of the Houndshill Centre, which opened in August 2008, has helped to clawback some of the comparison goods expenditure that was previously being lost to out of centre destinations and competing centres such as Preston. Indeed, such a view is confirmed by the findings of the household survey, undertaken in January and February of 2010, which indicates that the comparison goods retention rate has increased from 28.8 per cent in 2008[5], to 32.9 per cent in 2010.

2.30 Nevertheless, whilst footfall may have increased in the last two years, expenditure has not necessarily increased in a similar manner, and it is important for the Council to build upon and consolidate the recent success of Houndshill, by addressing the qualitative deficiencies in the offer, and reusing vacant units; this will further help to increase footfall in the town centre.

Accessibility

2.31 Blackpool is situated on the A584, which connects the town with Preston to the east, and Fleetwood to the north. Lytham and St Annes are accessible to the south via the A584. Two main train operators serve Blackpool; Northern, and Trans Pennine Express from Blackpool North railway station, and the town centre is linked to Lytham and St Annes via the Blackpool South station. A tramway also serves the Blackpool Coastline, with the system benefitting from around £100m of investment from the DfT for works to upgrade the line.

State of the Town Centre Environmental Quality

2.32 The environmental quality of Blackpool Town Centre is mixed; whilst areas such as the seafront and St Johns Precinct have benefitted from recent investment to improve the quality of the public realm, including street art, lighting and paving, there are still many areas which appear run down and unattractive. In particular, we note that some areas of the retail core are characterised by a poor quality public realm, including some parts of Bank Hey Street, Victoria Street, and the lower end of Church Street.

2.33 Nevertheless, we consider that the ongoing plans for the redevelopment and regeneration of the town centre, as guided by the Town Centre Strategy, will help to address these deficiencies, and contribute towards the Council's overall vision for the town centre as a more attractive destination for residents and visitors alike.

[5] WYG, Fylde Coast Retail Study, August 2008

Summary of the Performance of Blackpool Town Centre

2.34 The most recent survey of households, commissioned by RTP in 2010, indicates that there has been a slight clawback of expenditure to Blackpool Town Centre, with the retention level increasing modestly by 3 per cent from 29 per cent in 2008, to 32 per cent in 2010, following the opening of the Houndshill Phase I Extension. We consider, however, that given the dominance of Houndshill in terms of retail provision in Blackpool, the level of clawback that has occurred as a result of this development is somewhat low; this confirms that the Houndshill extension is only just a short term fix in terms of reversing the decline of the town centre. Moreover, the longer term trend indicates that since 1998, at the time of the Hillier Parker Retail Study, Blackpool Town Centre retained 43 per cent of the comparison goods expenditure of study area residents, so that overall, the last 12 years has a fall of 11 percentage points.

2.35 The quality of the retail offer in Blackpool is generally poor quality, and whilst there are some signs that this is gradually improving, with representation from new national multiple retailers attracted by the redevelopment of the Houndshill Centre and a slight fall in the vacancy rate, the overriding image of the centre's retail offer is that it does not provide the quality or range of retail offer that is necessary for clawing back the expenditure of residents.

2.36 Indeed, whilst a health check can only ever provide a 'snap shot' perspective of the health of the town centre, the overriding conclusion which emerges from the analysis is the necessity for the Council to provide a clear and focussed strategy to guide the regeneration of the town centre, and to help to reposition Blackpool as the first choice for residents of the Fylde Coast. If the Council and its partners are to build on the work which has been achieved so far, with schemes such as the Hounsdhill Phase I Extension and public realm improvements, there needs to be a significant step change in the town centre's retail offer and its environs so as to reposition Blackpool Town Centre as the shopping destination of choice for residents of the Fylde Coast.

South Shore

Movement in the National Retail Rankings

2.37 Table 1 of Appendix 2 demonstrates that South Shore has climbed 354 places from a position of 1,449 in 2003/04 to 1,095 in 2008 in the Management Horizons Rankings.

Diversity of Main Town Centre Uses

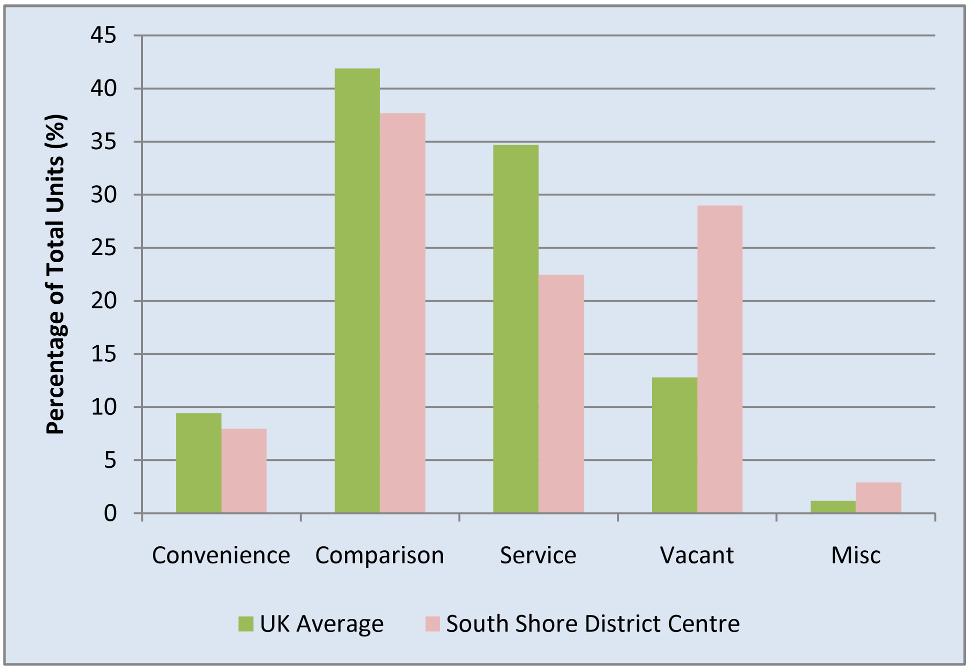
2.38 The main commercial focus for retail in South Shore is Waterloo Road. Table 2.2 confirms that the 11 convenience outlets in South Shore in February 2011 equate to 7.97 per cent of total retail and service uses; this is somewhat lower than the January 2011 UK average for convenience goods of 9.41 per cent. Within the convenience sector, representation is highest within the *'confectioners and newsagent'* sub-category, accounting for four of the 11 convenience outlets, followed by *'grocery and frozen food'* units, which account for a further three of the 11 convenience outlets.

Table 2.2 Summary of Diversity of Uses in South Shore at February 2011

Sector	Number of Units	Percentage of Total Units (%)	
		South Shore	National Average
Convenience	11	7.97	9.41
Comparison	52	37.68	41.90
Service	31	22.46	34.70
Vacant	40	28.99	12.80
Miscellaneous	4	2.90	1.19
TOTALS	**138**	**100.00**	**100.00**

2.39 The 52 comparison units in South Shore account for 37.68 per cent of total retail and service units in the centre; this is slightly lower than the UK average for January 2011 of 41.9 per cent and we note that there is no representation in the *'variety and department stores'* sub-category. However, there are ten *'clothing and footwear'* uses, which we consider to be a healthy quantum of such uses.

Chart 2.2 South Shore Diversity of Uses



2.40 Table 2.2 and Chart 2.2 also confirm that the 31 service units in South Shore District Centre equate to 22.46 per cent of total retail and service units; this is somewhat lower than the UK average in January 2011 of 34.7 per cent, and we note that there is no representation from the service sub-categories of *'travel agents'* and *'estate agents'.* Nevertheless, there is a high proportion of *'restaurants, cafés, fast food and take-aways'*, with 19 such units out of a total 31 service units. Moreover, the *'hairdressers and beauty'* sub-category is also well represented, with 8 such units out of a total 31 service units.

Retailer Representation and Intentions to Change Representation

2.41 In both the convenience and the comparison goods sector, retailer representation in South Shore is dominated by discount operators, although we note that in addition to a Cool Trader Frozen Food and Iceland, the centre also benefits from a Tesco Express. South Shore also benefits from the New Market and Victoria Centre, both of which cater for a wide range of independent convenience and comparison traders.

2.42 There is no published data available on retail or service requirements for South Shore, and we consider that given the proximity of Blackpool Town Centre, interest from national multiple operators in South Shore would be limited.

Proportion of Vacant Street Level Property

2.43 Table 2.2 indicates that there were 40 vacant units in South Shore in February 2011, this equates to a vacancy rate – as measured by the proportion of total retail and service units – of 28.99 per cent, which is significantly higher than the national average in January 2011 of 12.8 per cent. However, we note that 23 of these vacant units were located along Bond Street, which is removed from the commercial focus of the town centre along Waterloo Road.

Photos 5 and 6 Concentrations of Poor Quality Vacant Floorspace on Bond Street

2.44 Moreover, the findings of the WYG health check assessments indicate that in 2007, the vacancy rate was 19.09 per cent; this suggests a longer term problem with vacancies in the centre.

Pedestrian Flows (Footfall)

2.45 We are not aware of any recent pedestrian flow counts that have been undertaken in South Shore District Centre. However, our own observations reveal that at the time of our visits, the town centre appeared busy and popular, particularly along the eastern end of Waterloo Road.

Accessibility

2.46 South Shore is located on the A584 with Blackpool to the north, and St Annes and Lytham to the south. Car parking provision is adequate for a centre of this size, and the town centre benefits from good accessibility by public transport, including the South Shore rail station, located to the east of the centre,,bus and tram services. We note, also, that there are cycle park facilities.

State of the Town Centre Environmental Quality

2.47 The public realm in South Shore is generally well maintained, having benefitted from works to upgrade the image of the centre in June 2009 so as to encourage further investment in the centre. Indeed, we note that the centre benefits from wide, well lit pavements, several seating areas, and little evidence of litter or grafitti.

2.48 We note, however, that some of the buildings appear slightly run down and dated, and we consider, therefore, that these would benefit from refurbishment. Small improvements to the image of a centre can often reap disproportionate benefits, particularly in the smaller centres and where there is little scope for attracting a more diverse range of retailers.

Summary of the Performance of South Shore Town Centre

2.49 South Shore has a healthy convenience goods offer, albeit predominantly catering for the lower end of the retail market with retailers such as Cool Trader Frozen Food and Iceland. Comparison provision is slightly more limited, and dominated by independent and discount retailers. The vacancy rate was particularly high at the time of our land use audit in February 2011, and this seems to have also been the case at the time of the WYG survey in 2007. However, we note that the majority of the vacant units are located along Bond Street, which is away from the main retail focus of the centre along Waterloo Road, so that the re-use of these retail units into more viable uses would improve the image of the centre.

2.50 The public realm is generally well maintained, however, we consider that some of the buildings would benefit from cosmetic improvements to improve the overall image of the town centre for residents and visitors alike.

2.51 The 1999 Hillier Parker study for the Fylde Coast identified that South Shore was failing to fulfil its role in serving its local catchment, and such a view was endorsed again by Savills in 2005 study. The more recent 2008 study undertaken on behalf of the Fylde Coast authorities by WYG indicates a slight improvement, although still warned that vacancy rates were high, indicating a weakness in South Shore’s retail sector.

2.52 Our own assessment indicates that overall, South Shore is a vital centre, which appears relatively popular in serving the day to day needs of local residents. We do have concerns, however, regarding the viability of the centre, and this is reflected in the high vacancy rate, and lack of private sector investment in recent years. Thus, so as to prevent the further onset of decline, efforts should be made to encourage the refurbishment of vacant units so that they are fit for purpose; this will complement the public sector investment that has already been made in upgrading the image of the town centre through public realm works.

Bispham

Movement in the National Retail Rankings

2.53 Table 1 of Appendix 2 demonstrates that Bispham has climbed 220 places from a position of 1,545 in 2003/04 to 1,325 in 2008 in the Management Horizons Rankings, however we emphasise the caveat in relation to analysis of the retail rankings in paragraph 1.9.

Diversity of Main Town Centre Uses

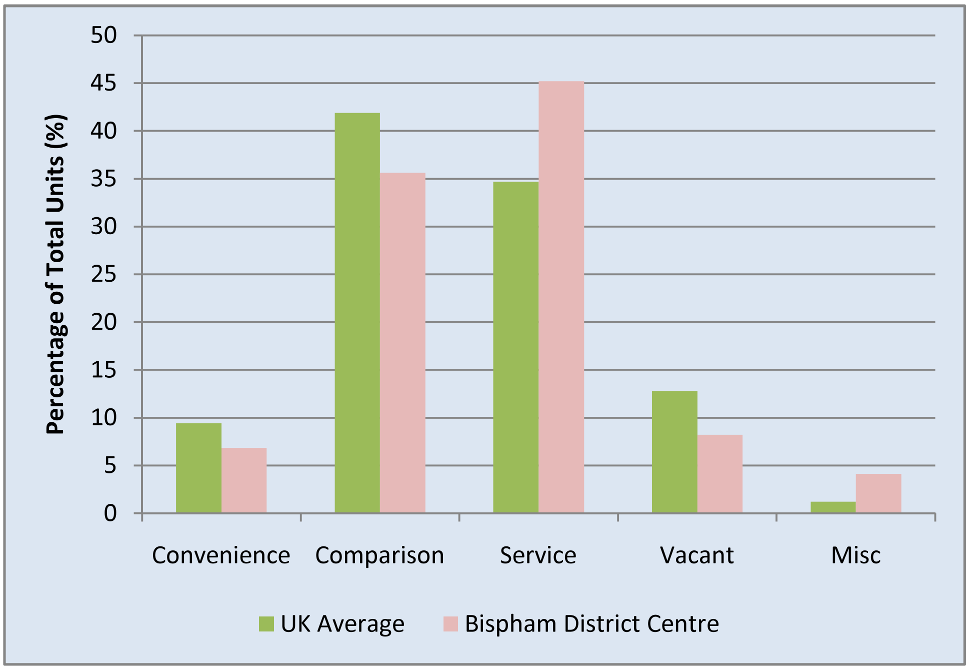
2.54 Table 2.3 confirms that at February 2011, there were 5 convenience units in Bispham District Centre, equating to 6.85 per cent of total retail and service units in the town centre; this compares to a national average in January 2011 of 9.41 per cent for convenience goods.

Table 2.3 Summary of Diversity of Uses in Bispham at February 2011

Sector	Number of Units	Percentage of Total Units (%)	
		Bispham	National Average
Convenience	5	6.85	9.41
Comparison	26	35.62	41.90
Service	33	45.21	34.70
Vacant	6	8.22	12.80
Miscellaneous	3	4.11	1.19
TOTALS	**73**	**100.00**	**100.00**

2.55 Comparison retailers in Bispham are slightly underrepresented, with the 26 comparison units in Bispham accounting for 35.62 per cent of total retail and service units in the centre; this compares to a national average of 41.9 per cent.

Chart 2.3 Diversity of Uses in Bispham District Centre



2.56 However, Table 2.3 confirms that the retail service sector is Bispham is strong, with the 33 service units equating to 45.21 per cent of total retail and service units; this is slightly higher than the national average of 34.7 per cent, and reflects the centre's tourist function. Indeed, there is particularly strong representation from the *'restaurants, cafés, fast food and take-aways'* sub-category, with 16 such uses out of a total 33 services uses.

Retailer Representation and Intentions to Change Representation

2.57 The convenience offer in Bispham is adequate, and includes representation from Tesco and J Sainsbury in addition to several lower quality small butchers and grocers. The centre also benefits from the presence of the Bispham market.

2.58 Representation in the comparison goods sector is slightly limited, with few retailers operating in the important clothing sub-category. We note, also, that there are no national multiples, however, there are a number of independent retailers, and the proximity of Blackpool limits the scope or the necessity for the improvement of representation from national comparison multiples.

2.59 Within the services sector, there is strong representation from the *'restaurants, cafés, fast food and take-aways'* sub-category, however, the majority of such uses are lower quality fast food and take-away outlets, so that better quality provision for families is limited.

Proportion of Vacant Street Level Property

2.60 Table 2.3 and Chart 2.3 indicate that there were 6 vacant units in Bispham in February 2011, equating to a vacancy rate of 8.22 per cent; this is notably lower than the national average vacancy rate in January 2011 of 12.8 per cent. The majority of the vacant units are small in size, are not clustered, so that we do not consider the presence of these vacant units to be of particular concern.

Pedestrian Flows (Footfall)

2.61 We are not aware of any recent pedestrian flow counts that have been undertaken in Bispham Town Centre. However, our own observations reveal that footfall seems slightly low, with the highest pedestrian flows recorded to the east of Red Bank Road near the J Sainsbury store.

Accessibility

2.62 Bispham is situated to the north of Blackpool Town Centre, on the A584. Parking provision is adequate for a centre of this size. Access to Bispham via public transport is good, with bus and tram facilities linking the centre to nearby Blackpool and Fleetwood.

State of the Town Centre Environmental Quality

2.63 The public realm in Bispham is generally well maintained, with little evidence of litter, and a number of seating areas. The buildings themselves are of mixed quality, and we consider that some of the more dated and tired looking buildings would benefit from refurbishment, thereby improving the overall look and feel of the centre. Indeed, as we have already noted for South Shore, small improvements to the image of a centre can often reap disproportionate benefits, particularly in the smaller centres, where there is little scope for attracting a more diverse range of retailers.

Summary of the Performance of Bispham Town Centre

2.64 Bispham has a healthy and diverse convenience offer, with strong representation from both national multiples – such as J Sainsbury - and smaller, independent retailers. However, the comparison goods offer in Bispham is slightly limited, in terms of both quantum and representation from better quality retailers. Nevertheless, we consider that given the proximity of Blackpool as the higher order centre, this is not a cause for concern.

2.65 We note, also, that the vacancy rate is low in Bispham, and the town centre environment is pleasant and generally we maintained. We consider, therefore, that overall Bispham is generally a vital and viable centre, and small improvements to the overall image of the centre would help maintain and enhance this position.

Fylde Borough

Kirkham

Movement in the National Retail Rankings

2.66 Table 1 of Appendix 2 demonstrates that Kirkham has fallen 171 places from a position of 1,545 in 2003/04 to 1,716 in 2008 in the Management Horizons Rankings. Whilst this is a notable drop, we note that the methodology used in calculating the rankings between these two years differs, and the 2008 rankings include an additional 5,048 centres, so that comparison between these years of the smaller centres should be made with caution.

Plan 2.1 Kirkham Town Centre GOAD Plan

Diversity of Main Town Centre Uses

2.67 Kirkham contained 9 convenience outlets in February 2011 (Table 2.4); this equates to 9.28 per cent of the centre’s total units, which is slightly lower than the national average of 9.41 per cent. However, the centre is anchored by a medium-sized W M Morrison store, so that although the proportion of convenience units is low, there is a higher than average proportion of convenience floorspace.

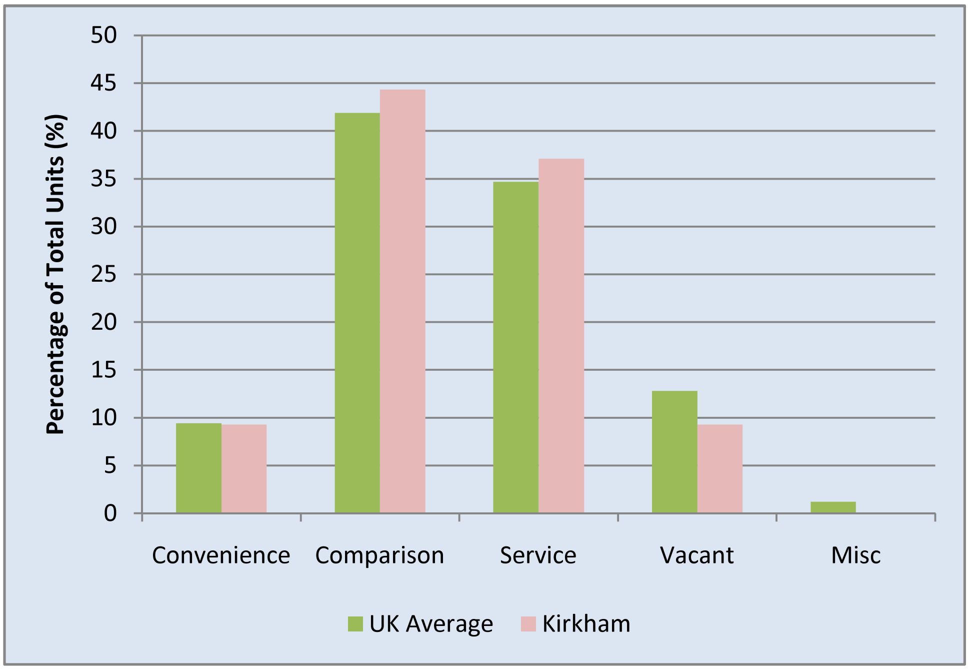
Table 2.4 Summary of Diversity of Uses in Kirkham at February 2011

Sector	Number of Units	Percentage of Total Units (%)	
		Kirkham	National Average
Convenience	9	9.28	9.41
Comparison	43	44.33	41.90
Service	36	37.11	34.70
Vacant	9	9.28	12.80
Miscellaneous	0	0.00	1.19
TOTALS	**97**	**100.00**	**100.00**

2.68 Table 2.4 also shows that as at February 2011, Kirkham contained 43 comparison units, equating to 44.33 per cent of total retail and service units in the centre; whilst this is higher than the national average of 41.9 per cent, we note that the centre does not secure representation from any national fashion multiples in the important comparison sub-category of clothing and footwear; this forms the core of the 'high street' retail offer, so representation from operators in this sub-category is important. Indeed, we note that the M&Co has now been replaced by a Poundstretcher store, indicating a decline in the quality of the comparison offer in Kirkham.

2.69 In the service sector, Kirkham contains 36 units, equating to 37.11 per cent of total retail and service units; this is slightly higher than the UK average of 34.70 per cent. Indeed, we note strong representation in the *'restaurants, cafés, fast food and take-aways'* and *'banks and financial services'* sub-categories.

Chart 2.4 Diversity of Uses in Kirkham Town Centre



Retailer Representation and Intentions to Change Representation

2.70 Kirkham attains an overall rating of 'middle' in MHE's market position index. The fashion market position of the centre is also classified as 'lower' with 50 per cent of fashion retailers falling within the 'lower-middle' category and the remaining 50 per cent classified as 'value'.

2.71 In the convenience goods sector, Kirkham benefits from representation from national retailers W M Morrison and the Co-Op. However, in the comparison goods sector, following the closure of the M&Co store, there is no representation from any fashion multiples, and the centre is dominated by independents operating in the middle to lower end of the retail spectrum.

Photo 7 W M Morrison Foodstore

2.72 The findings of our land use audit indicates that as at February 2011 there were six charity shops in the centre, equating to 6.19 per cent of total retail and service units compared to a UK average of 3.71 per cent. The presence of these shops serves to reduce the quality of the overall retail offer in the town centre, as well as limiting choice for shoppers.

2.73 Nevertheless, there are a number of good quality independent retailers operating in Kirkham in both the convenience and comparison sectors, enhancing the overall image of the high street, and quality of the retail offer. It is important, therefore, that these independent retailers are supported so as to maintain their vitality and viability, and prevent the further rise in vacant units, and decline in the quality of the retail offer.

Photo 8 Discount Retailers in Kirkham

Proportion of Vacant Street Level Property

2.74 The proportion of vacant units in Kirkham falls below the national average, with 9 vacant units in February 2011 equating to 9.28 per cent of total retail and service units. Our own observations of the town centre indicate that there are no large or prominent vacancies, and that many of the vacant units are small in size.

2.75 We note, however, that the current vacancy rate of 9.28 per cent is significantly higher than that recorded by WYG in 2008 of just 2.1 per cent; we are concerned, therefore, that although the current vacancy rate remains lower than the national average, it would appear to be worsening, so that the situation should be monitored, and efforts made to encourage the re-occupation or re-use of vacant units.

Pedestrian Flows (Footfall)

2.76 We have not undertaken our own formal pedestrian flow count as part of this study, however, our own informal observations reveal that Kirkham has moderate levels of pedestrian flows, with the busiest parts of the centre focusing around the Morrisons store and Market Square.

Accessibility

2.77 Kirkham is situated on the A583, with Blackpool to the west, and Preston to the east. The centre is easily accessible via public transport, benefitting from rail and bus services which link Kirkham to neighbouring centres.

2.78 Car parking provision in the centre is adequately catered for, with a number of main car parks, and the option of on-street parking and free parking, Indeed, in smaller towns such as Kirkham, the availability of free parking assists in making the centre more attractive to visitors vis-à-vis larger centres, where shoppers would be expected to pay for such facilities, or out of centre retail parks, where parking is free,

State of the Town Centre Environmental Quality

2.79 Kirkham is a linear centre, with the main commercial focus located along Poulton Street and, to a lesser extent, Church Street. The pavements and streets are clean, with little evidence of litter or grafitti and the centre benefits from areas of planting and seating which serve to enhance the overall quality of the public realm.

2.80 However, some of the buildings would benefit from improvement and/or refurbishment, particularly along Station Road, where we have noted a new vacancy since October 2009.

Photo 9 Improvements to the Public Realm

Summary of the Performance of Kirkham Town Centre

2.81 Our own observations, and the findings of our land use audit, indicate that Kirkham is showing some signs of decline. Whilst the convenience offer is strong, the comparison retail sector is slightly less represented, and whilst we do not consider that this is of particular concern given that residents would be expected to travel to higher order centres to undertake much of this shopping, there is a growing number of vacancies, signalling a decline in the vitality and viability of the centre.

2.82 Thus, in respect of Kirkham, the focus should be on halting the increasing number of vacancies and diversifying the retail offer through promoting the refurbishment of vacant units that are no longer fit for purpose. Moreover, the centre would benefit from an uplift in the quality of the retail offer, so that it does not become dominated by charity and discount retailers; this will enable Kirkham to better capture the spend of local residents.

Lytham

Movement in the National Retail Rankings

2.83 Lytham and St Annes Town Centres are not classed separately in the MHE retail rankings. We note, however, that under the entry 'Lytham St Annes', the centre climbed 55 places from a position of 391 in 2003/2004 to 336 2008. This is an encouraging indication.

Plan 2.2 Lytham Town Centre GOAD Plan

Diversity of Main Town Centre Uses

2.84 Table 2.5 demonstrates that the convenience goods sector is particularly well catered for in Lytham, with the town centre benefitting from several independent butchers and greengrocers, in addition to a Tesco Express and a Co-Op store. We note, also, that there is a large Booths foodstore located just on the edge of the town centre boundary on Park View Road.

Photo 10 Good Quality Independent Grocery Retailers

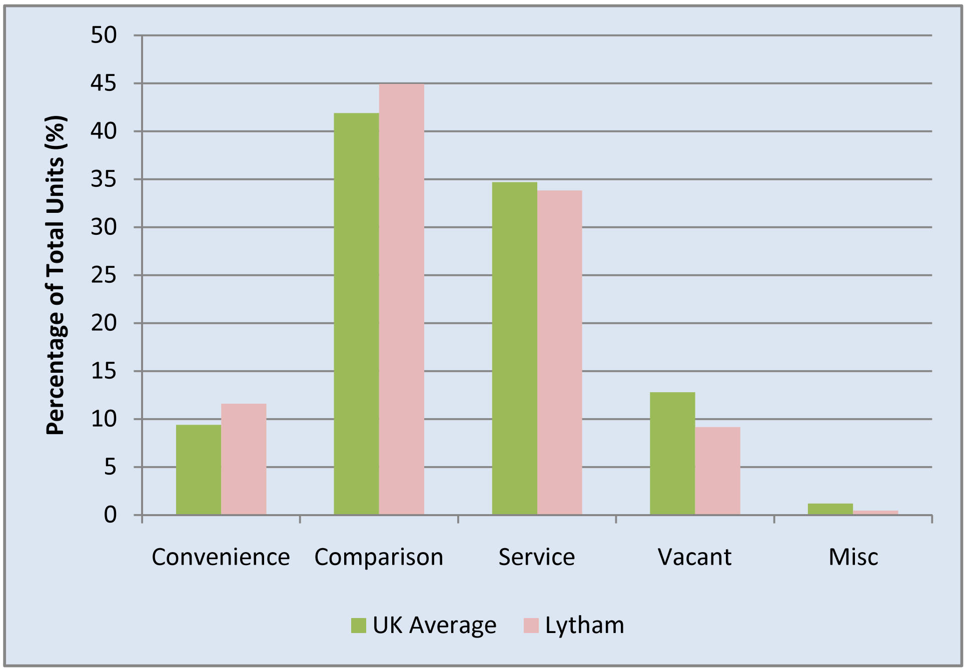
Table 2.5 Summary of Diversity of Uses in Lytham at February 2011

Sector	Number of Units	Percentage of Total Units (%)	
		Lytham	National Average
Convenience	24	11.59	9.41
Comparison	93	44.93	41.90
Service	70	33.82	34.70
Vacant	19	9.18	12.80
Miscellaneous	1	0.48	1.19
TOTALS	**207**	**100.00**	**100.00**

2.85 The comparison goods sector is also strong, bolstered by the presence of the J W Stringer department store, and a number of smaller, independent fashion retailers. Moreover, charity shops only make up 5 of the total 207 retail and service units, and we note that Fat Face clothing store has filled a vacant unit at Hastings Place.

2.86 In the service sector, Lytham benefits from several good quality cafés and restaurants and we note that two new restaurants have recently opened on Henry Street, so that the food and drink offer in Lytham is well catered for.

Chart 2.5 Diversity of Uses in Lytham Town Centre



2.87 Services such as banks, building societies and estate agents are also well catered for, indeed, there are 11 estate agents, equating to 5.39 per cent of total retail and service outlets in the centre.

Retailer Representation and Intentions to Change Representation

2.88 Lytham benefits from a good diversity of uses in the comparison goods sector, and a strong convenience sector, with national multiples such as Tesco and Co-op representing the latter.

2.89 In the comparison goods sector there is strong representation from quality independent retailers, including the department store J W Stringers, which has recently opened a new store selling home goods adjacent to the Booths store on Park View Road. Moreover, 'Fat Face', a national fashion multiple, has recently occupied a vacant unit on Hastings Place.

Photo 11 and 12 Retail and Restaurant Representation in Lytham

2.90 Analysis of retailer requirements, published by Focus in their Town Centre Reports, indicates that between January 2009 and January 2010, the number of retailer requirements listed for Lytham St Annes fell from 18 to 9.

Shopping Rents and Yields

2.91 Separate information on rents and yields is not available for Lytham and St Annes. However, under the classification of 'Lytham St Annes', we note that prime Zone A retail rents have increased by £10 per sq.ft, from £35 per sq.ft in 1998 to £45 per sq.ft in 2008. Similarly, all risk yields have also improved, decreasing from a high of 10 per cent in 2002, to 8 per cent in 2008; this suggests strengthened investor confidence in the centre.

Proportion of Street Level Vacant Property

2.92 Vacancies in Lytham Town Centre are lower than the UK average of 12.80 per cent, at 9.18 per cent, equating to 19 units. This is a significant improvement on the vacancy rate recorded by GOAD in October 2009 of 12.25 per cent, although there is still some way to go if the vacancy rate is to return to the low rate recorded by WYG in November 2007 of just 2.86 per cent.

Pedestrian Flows (Footfall)

2.93 We are not aware of any recent pedestrian flow counts that have been undertaken in Lytham Town Centre. However, our own observations reveal that Lytham is a busy and vibrant centre and is popular with local residents in catering for their convenience and comparison shopping needs.

Accessibility

2.94 Lytham Town Centre is situated on the A584, with St Annes and Blackpool located to the northwest of the centre. The centre benefits from good parking provision, and accessibility by public transport is available via bus or train.

State of the Town Centre Environmental Quality

2.95 Lytham is a particularly attractive and pleasant centre, with well maintained streets and buildings, and areas of seating and planting throughout. There are also several buildings of architectural interest, and on our visits, there was no evidence of litter or grafitti. Moreover, we note that the centre's location on the attractive seafront helps to contributes to this high quality town centre environment.

Summary of the Performance of Lytham Town Centre

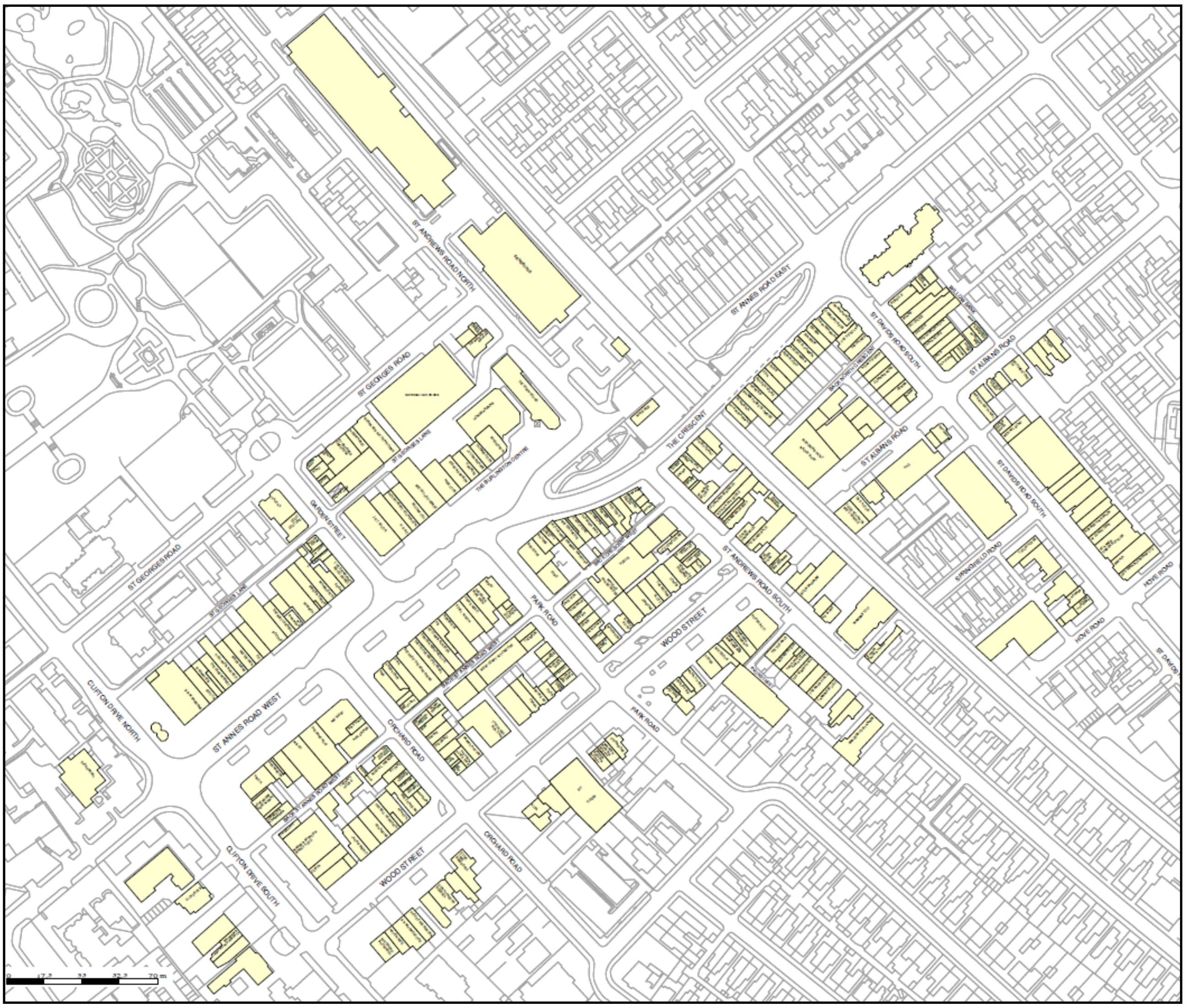
2.96 On the whole, the findings of our health check assessments demonstrate that Lytham is a notably vital and viable centre, with a good diversity of retail and service uses, and good representation from quality independent retailers in the convenience and comparison sectors. The focus, therefore, should be on maintaining this high level of health, so that the centre continues to serve the needs of residents and visitors. There appear to be few opportunities, however, for retail development of any material scale, and there is a physical and environmental limit to the town centre's ability to accommodate significant development.

St Annes

Movement in the National Retail Rankings

2.97 Lytham and St Annes Town Centres are not classed separately in the MHE retail rankings. We note, however, that under the entry 'Lytham St Annes', the centre climbed 55 places from a position of 391 in 2003/2004 to 336 in 2008. This is an encouraging indication.

Plan 2.3 St Annes Town Centre GOAD Plan



Diversity of Main Town Centre Uses

2.98 The findings of our land use audits, undertaken in February 2011 (Table 2.6), indicate that the 20 convenience units in St Annes Town Centre account for for 7.78 per cent of total units, which compares to the national average at January 2011 of 9.41 per cent.

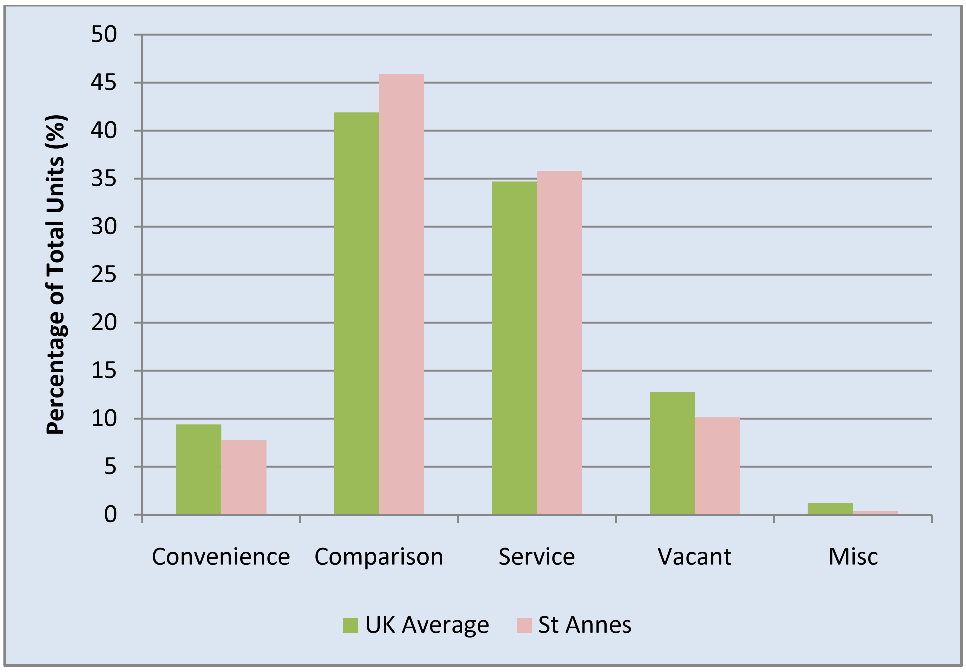
2.99 The comparison goods sector in St Annes is not so well represented, particularly in the clothing and footwear sub-categories, and we note that of charity shops the 9 charity shops (as of February 2011), 5 are located in the prime retail core. Indeed, whilst the 118 comparison units account for 45.91 per cent of total retail and service units, which is slightly higher than the UK average, there are a limited proportion of clothing and footwear retailers.

Table 2.6 Summary of Diversity of Uses in St Annes at February 2011

Sector	Number of Units	Percentage of Total Units (%)	
		St Annes	National Average
Convenience	20	7.78	9.41
Comparison	118	45.91	41.90
Service	92	35.80	34.70
Vacant	26	10.12	12.80
Miscellaneous	1	0.39	1.19
TOTALS	**257**	**100.00**	**100.00**

2.100 The proportion of service units in St Annes is slightly higher than the UK average, and Table 2.6 indicates that the 92 service units account for 35.80 per centre of total town centre retail and service outlets. In particular, we note that there is a diverse range of good quality restaurants and cafés.

Chart 2.6 Diversity of Uses in St Annes Town Centre



Retailer Representation and Intentions to Change Representation

2.101 Representation in the convenience goods sector is provided for by the Marks and Spencer Simply Food, and albeit located on the edge of the town centre, a J Sainsbury foodstore. We note that the Booths foodstore in St Annes had recently closed at the time of our visits, so that there has been a small decline in the quantum of retail floorspace devoted to convenience goods since the WYG Retail Study in 2008.

2.102 Nevertheless, representation from independent operators is strong, with a good number of butchers and greengrocers, so that we do not consider the closure of the Booths foodstore to have impacted negatively upon retailer representation in the convenience goods sector in St Annes.

2.103 In the comparison goods sector, St Annes benefits from the J R Taylor Department store, in addition to representation from fashion multiples such as New Look and The Edinburgh Woolen Mill. However, for a centre of this size, and given the relative affluence of the catchment, we consider that there is still scope for the improvement of retailer representation in the comparison goods sector.

Photo 13 J R Taylor Department Store in St Annes

2.104 Analysis of retailer requirements, published by Focus in their Town Centre Reports, indicates that between January 2009 and January 2010, the number of retailer requirements listed for Lytham St Annes fell from 18 to 9.

Shopping Rents and Yields

2.105 Separate information on rents and yields is not available for Lytham and St Annes. However, under the classification of 'Lytham St Annes', we note that prime Zone A retail rents have increased by £10 per sq.ft, from £35 per sq.ft in 1998 to £45 per sq.ft in 2008. Similarly, all risk yields have also improved, decreasing from a high of 10 per cent in 2002, to 8 per cent in 2008; this indicates strengthened investor confidence in the centre.

Proportion of Vacant Street Level Property

2.106 There were 26 vacant units in St Annes at the time of our visit in February 2011, and this equates to a vacancy rate – as measured by the proportion of total retail and service units – of 10.12 per cent; this is slightly lower than the national average of 12.80 per cent.

Photo 14 Large and Prominent Vacant Foodstore

2.107 We note that the Booths foodstore in St Annes had recently closed down at the time of our visits, and so we consider that the re-occupation of this prominent unit should be encouraged; indeed, the refurbishment of this unit presents an opportunity to provide the type of modern and efficient units that are attractive to national comparison retailers, thereby addressing deficiencies in the comparison goods offer of St Annes, and building on existing representation from retailers such as ‘New Look’.

Pedestrian Flows (Footfall)

2.108 We are not aware of any recent pedestrian flow counts that have been undertaken in St Annes Town Centre. However, our own observations reveal that St Annes is a busy and vibrant centre, particularly along St Annes Road West, which forms the commercial focus for the town.

Accessibility

2.109 St Annes is situated on the A584, connecting Blackpool to the north, and Lytham to the south east. Car parking in St Annes would appear to be adequate, with various options in terms of length of stay and price.

2.110 The town centre is also easily accessible via public transport, benefitting from train and bus links to neighbouring centres.

State of the Town Centre Environmental Quality

2.111 St Annes has recently benefitted from public realm improvements, and this provides a pleasant shopping environment. We noted, at the time of our visit, several seating areas, a large amount of planting and shrubbery, and wide, clean pavements.

Photos 15 and 16 Wide Open Pavements, Seating and Planting in St Annes

Summary of the Performance of St Annes Town Centre

2.112 St Annes is a well maintained and vibrant centre, with a strong convenience base, although lacking slightly in the comparison goods sector. Indeed, the clothing and footwear sub-category is somewhat underrepresented, and we noted a high proportion of charity shops during the time of our visits.

2.113 Whilst the vacancy rate in St Annes falls below the national average, some of the more prominent and larger vacant units, should be encouraged for re-use through their refurbishment or the offer of incentives for new businesses. This will help to diversify the comparison retail offer, and prevent vacant units detracting from the overall vitality and viability of the centre.

Wyre Borough

Cleveleys

Movement in the National Retail Rankings

2.114 Between 2000/01 and 2008, Cleveleys Town Centre climbed 63 places in the MHE Retail Rankings, from a position of 450 in 2000/01 to 387 in 2008. This steady rise in the rankings is an encouraging indication.

Plan 2.4 Cleveleys Town Centre GOAD Plan

Diversity of Main Town Centre Uses

2.115 Table 2.7 indicates that there are 25 convenience units in Cleveleys, which in total account for 10.08 per cent of total retail and service units in the centre; this is more or less in line with the national average of 9.41 per cent. Indeed, we note that Cleveleys benefits from a Tesco Metro and Marks and Spencer Simply Food, in addition to a number of smaller, independent convenience retailers. In this context, we consider that the convenience offer in Cleveleys adequately caters for the needs of the centre's local catchment, and is healthy in terms of both scale and diversity.

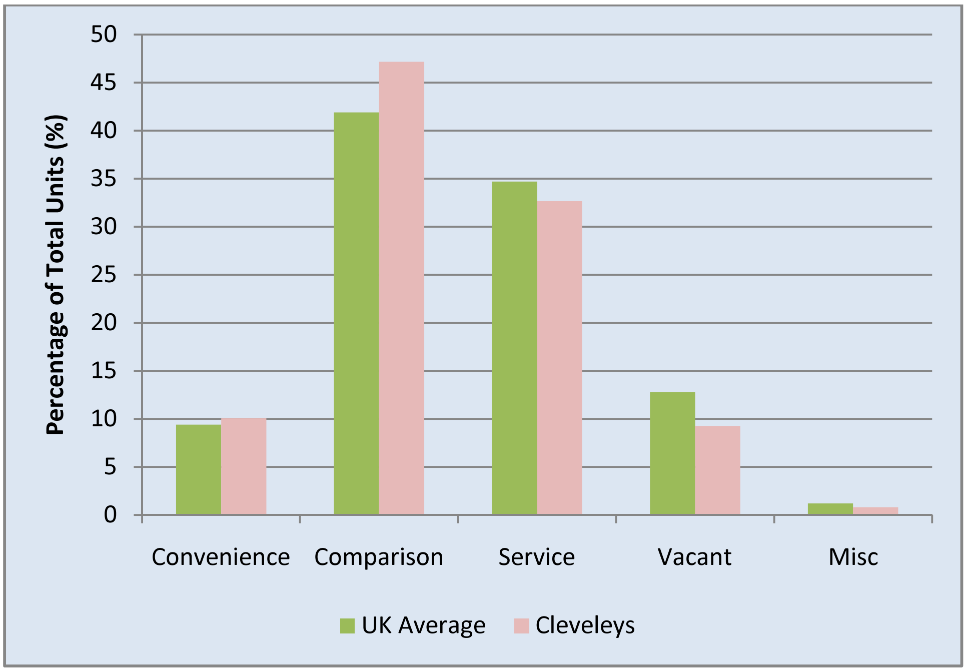
2.116 Representation in the comparison goods sector is higher than the national average of 41.90 per cent, with the 117 comparison units accounting for 47.18 per cent of total retail and service outlets. Nevertheless, representation within the clothing and footwear sub-category is variable, with a good presence in the women's clothing sub-category, but a weak presence in the men's and mixed clothing sub-categories

Table 2.7 Summary of Diversity of Uses in Cleveleys at March 2011

Sector	Number of Units	Percentage of Total Units (%)	
		Cleveleys	National Average
Convenience	25	10.08	9.41
Comparison	117	47.18	41.90
Service	81	32.66	34.70
Vacant	23	9.27	12.80
Miscellaneous	2	0.81	1.19
TOTALS	**248**	**100.00**	**100.00**

2.117 Service uses are well catered for in Cleveleys, reflecting the centre's tourist function. Indeed, we note that there are a high proportion of cafés and food outlets throughout the centre, with a predominance of take-aways catering for the tourist market located in the vicinity of the recently improved promenade.

Chart 2.7 Diversity of Uses in Cleveleys Town Centre



Retailer Representation and Intentions to Change Representation

2.118 Within the convenience sector there is good representation from both national multiples retailers, and smaller independent retailers.

2.119 However, in the comparison goods sector, representation from national multiples is limited, and the offer is focused towards the lower end of retail spectrum. Indeed, we note that Cleveleys attains an overall classification of *'lower'* for fashion in MHE's 2008 Index, with 9 per cent of retailers falling within the *'value'* category, 21 per cent falling within the *'lower-middle'* category and 44 per cent falling within the *'middle'* category.

2.120 Moreover, within the comparison goods sector, representation from multiples is dominated by discount retailers such Shoe Zone, Bon Marche, B&M Bargins and M&Co; this suggests a limited choice within the comparison goods sector.

Photos 17and 18 Discount Retailers and Charity Shops in Cleveleys

Shopping Rents and Yields

2.121 All risk yields for prime retail property in Cleveleys remained constant at 8.5 per cent between 2000 and 2007. In Fleetwood, the equivalent yield was 10 per cent in 2007, indicating that Cleveleys is viewed as a slightly more attractive destination by investors.

Proportion of Vacant Street Level Property

2.122 The findings of our town centre visit, undertaken in March 2011, revealed 23 vacant units in Cleveleys Town Centre. This is equates to a vacancy rate – as measured by the proportion of total retail and service units – of 9.27 per cent, which is below the national average of 12.80 per cent. However, we note that in October 2009, the GOAD report recorded 19 vacant units, whilst the November 2007 GOAD report[6] recorded just 9 vacant units, so that the trend is one of a steadily rising vacancy rate.

Pedestrian Flows (Footfall)

2.123 We are not aware of any recent pedestrian flow counts that have been undertaken in Cleveleys Town Centre. However, our own observations reveal that Cleveleys is a moderately busy centre, with the highest levels of footfall recorded along Victoria Street West between Rossall Road and Princess Road.

Accessibility

2.124 Cleveleys is situated on the A587, with Fleetwood to the north, and Blackpool to the south. Car park provision in the centre is adequate, and includes a number of options in terms of length of stay and price, in addition to some on-street parking.

2.125 Accessibility via public transport is also good, and the centre benefits from access to the Blackpool tram network – which is currently undergoing enhancement - and bus services, although we note that the bus station is in a poor condition.

State of the Town Centre Environmental Quality

2.126 The public realm in Cleveleys is not as good as it could be, with many buildings looking tired and run down and in need of improvement, particularly the vacant market building. However, we note that the pavements are generally clean, with little evidence of litter or graffiti, and there are several areas of seating along the length of the centre. Moreover, Cleveleys has recently benefited from improvement works to the town's coastal defences.

[6] Published in the WYG Fylde Coast Retail Study, 2008

Photo 19 Improvements to the Seafront in Cleveleys

Summary of the Performance of Cleveleys Town Centre

2.127 On the whole, we consider that Cleveleys is a vital and viable centre, demonstrating strong levels of footfall, and a strong convenience sector in terms of quantum of floorspace and representation from a wide range of retailers. The service sector is also well represented, particularly in relation to the provision of cafés and food outlets that cater for the tourist population.

2.128 In contrast, the comparison offer in the centre is slightly weaker, with underrepresentation in the sub-category of men's clothing, and an overall comparison offer that is focused towards the lower end of the retail spectrum.

2.129 Moreover, we note that the centre is rather long and linear, so that the Council should consider encouraging the contraction of the centre to provide a more focused retail core, whilst enabling the change of use of less viable retail units, or vacant units, located on the periphery of the centre.

Fleetwood

Movement in the National Retail Rankings

2.130 Movement in the position of Fleetwood town centre in the national retail rankings indicates that the centre has fallen by 270 places over the last decade from a position of 461 in 1998/1999, to 731 in 2008, although we note that this decline has slowed in more recent years. We consider that this is quite a significant fall over this period. Table 1 of Appendix 2 demonstrates that this is the second biggest fall in the rankings of all the study centres included in this period in MHE's rankings.

Diversity of Main Town Centre Units

2.131 Table 2.8 summarises the findings of our land use audit of the centre, undertaken in March 2011. The findings indicate that there are 25 convenience units in Fleetwood Town Centre, which in total account for 11.52 per cent of total retail and service units; this is higher than the UK average of 9.41 per cent. Within the convenience sector, provision is dominated by the large Asda foodstore, in addition to a smaller Tesco and Iceland foodstore. Thus, we consider that Fleetwood benefits from a strong convenience goods offer in terms of both quantum of floorspace, and the range of choice in convenience provision.

Plan 2.5 Fleetwood Town Centre GOAD Plan

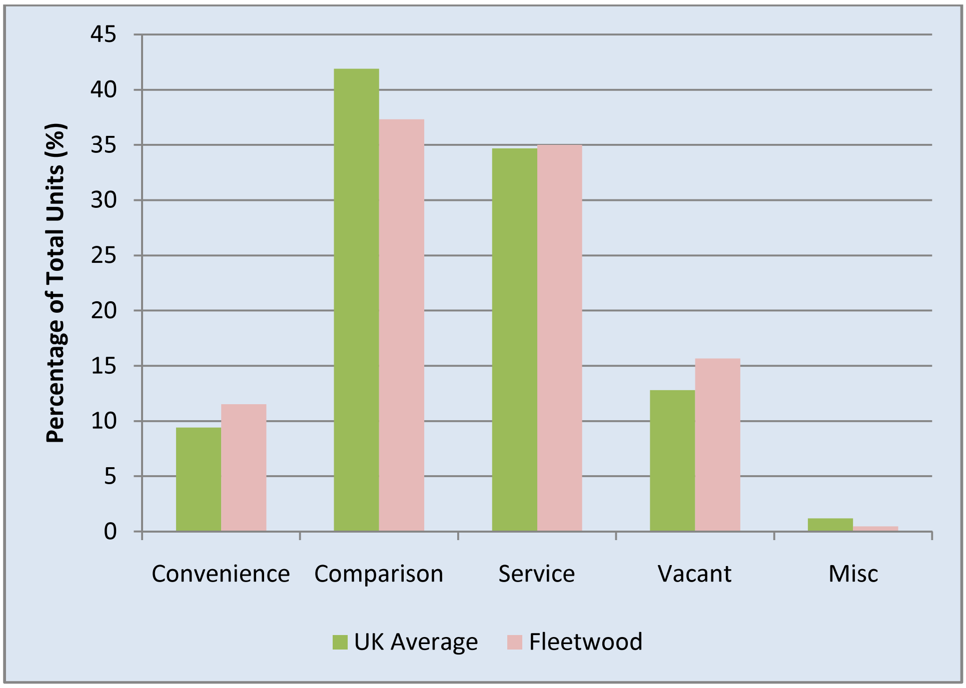
2.132 In contrast, the comparison goods sector in Fleetwood is somewhat weak, and this is most likely due to the proximity of Freeport Shopping Village which is located just beyond the edge of the town centre, and caters for a wide range of multiple comparison retailers.

Table 2.8 Summary of Diversity of Uses in Fleetwood at March 2011

Sector	Number of Units	Percentage of Total Units (%)	
		Fleetwood	National Average
Convenience	25	11.52	9.41
Comparison	81	37.33	41.90
Service	76	35.02	34.70
Vacant	34	15.66	12.80
Miscellaneous	1	0.46	1.19
TOTALS	**217**	**100.00**	**100.00**

2.133 Indeed, Fleetwood is most significantly underrepresented in the important clothing and footwear subcategory, and we note that Fleetwood contains only a limited number of national multiples, all of which are focused at the lower end of the retail spectrum, and include a large proportion of discount and charity shops.

Chart 2.8 Diversity of Uses in Fleetwood Town Centre



2.134 Within the service sector, Fleetwood benefits from a number of healthy food and drink establishments, however again, provision is generally focused towards the lower end of the retail spectrum, with the majority of such uses comprising cafés and fast food outlets, rather than family restaurants or middle-market outlets.

Retailer Representation and Intentions to Change Representation

2.135 Whilst retailer representation in the convenience goods sector is strong, benefitting from the presence of Asda, the Fleetwood Market and a range of independent operators, representation from national comparison multiples in Fleetwood is limited, and those that are present - such as Peacocks and a number of charity shops – are predominantly focused towards the lower end of the retail spectrum. Thus retailer representation in the comparison goods sector in Fleetwood is poor, and there is limited choice for shoppers, so that many will choose to visit the edge-of-centre Freeport Shopping Village at the expense of the town centre.

2.136 Indeed, we note that Fleetwood achieves an overall classification of *'value'* for in MHE's 2008 Index, with 22 per cent of retailers falling within the *'value'* category, 37 per cent falling within the *'lower-middle'* category and 10 per cent falling within the *'middle'* category.

2.137 Analysis of retailer requirements, published by Focus in their town centre reports, indicates that between January 2009 and January 2010, the number of retailer requirements listed for Fleetwood Town Centre rose from 4 to 5. However, this represents a fall since April 2007, when 11 requirements were posted.

Proportion of Vacant Street Level Property

2.138 The findings of our land use audit, undertaken in March 2011 and summarised in Table 2.8, indicates that there were 34 vacant units in Fleetwood Town Centre, equating to a vacancy rate – as measured by the total proportion of retail and service units – of 15.66 per cent;

this is higher than the national average of 12.80 per cent. We note, also, that the October 2009 GOAD report identified 30 vacant units, a further increase from 23 vacant units as recorded by GOAD in 2007. Thus, as is the case with Cleveleys, the vacancy rate in Fleetwood is steadily increasing.

2.139 Since the time of the WYG study in 2008, we note that the vacancy rate in Fleetwood has risen slightly from 9.31 per cent, an indication that the health of Fleetwood is deteriorating.

2.140 Our own observations of the town centre reveal that many of the vacant units are small in size, and of poor quality, so that their refurbishment should be encouraged in order to help attract better quality retailers into the centre. Moreover, those vacancies located on the outer parts of the town centre could be re-used for more viable uses so as to encourage a more focused and viable retail core.

Pedestrian Flows (Footfall)

2.141 We are not aware of any recent pedestrian flow counts that have been undertaken in Fleetwood Town Centre. However, our own observations reveal that Fleetwood is a busy centre, and pedestrian flows appear high throughout, with the busiest areas along the south western end of Lord Street, and in and around the market on Adelaide Street.

Accessibility

2.142 Fleetwood is situated on the A587, with the A585 also being a key route into the centre, with Blackpool located to the south. Car park provision in Fleetwood is plentiful, with several options in terms of duration of stay, and including on-street parking.

2.143 Fleetwood is also easily accessible by bus, and the nearest train station to Fleetwood is at Blackpool North or Poulton-le-Fylde. The tramway is also currently being upgraded, and this provides links to Blackpool.

State of the Town Centre Environmental Quality

2.144 Fleetwood is a clean centre, with little evidence of litter or graffiti, and benefitting from street lighting throughout and areas of seating and planting. The buildings are generally of a poor quality however, and we consider that many would benefit from improvement and/or refurbishment.

Photo 20 Improvements to the Public Realm in Fleetwood

2.145 Small improvements to the image of a centre can often reap disproportionate benefits, particularly in the smaller centres, where there is little scope for attracting a more diverse range of retailers, and so cosmetic improvements, such as the maintenance of buildings, should be encouraged.

Summary of the Performance of Fleetwood Town Centre

2.146 On the whole, Fleetwood is a reasonably vital centre, benefitting from a strong convenience goods and service sector, and healthy levels of footfall.

2.147 However, we consider that Fleetwood is deficient in terms of its comparison goods offer, and representation from national multiples is limited, so that many residents will choose to travel to Freeport, on the edge of the town centre, to undertake their comparison goods shopping purchases. Moreover, the vacancy rate in Fleetwood is slightly higher than the national average, at 15.7 per cent, and has risen since the 2008 WYG study.

Garstang

Movement in the National Retail Rankings

2.148 Garstang Town Centre experienced a significant fall of 501 places in the MHE retail rankings between 2003/04 and 2008, to a position of 1,950. We note, however, that the methodology used in the rankings between these two years differs, and the 2008 rankings include an additional 5,048 centres, so that comparison between these years of the smaller centres should be made with caution.

Diversity of Main Town Centre Uses

2.149 Garstang has a strong convenience goods sector, benefitting from a J Sainsbury, and a recently redeveloped Booths foodstore. The centre also contains a number of healthy independent food operators such as butchers and bakers. We consider, therefore, that the convenience offer in Garstang is strong, in terms of both range and choice of operators. Indeed, the findings of our land use audits, summarised in Table 2.9, indicate that as of February 2011, there were 14 convenience units in Garstang Town Centre, equating to

13.08 per cent of total retail and service units; this compares to a national average of 9.41 per cent.

Photo 21 Redeveloped Booths Foodstore

Table 2.9 Summary of Diversity of Uses in Garstang at February 2011

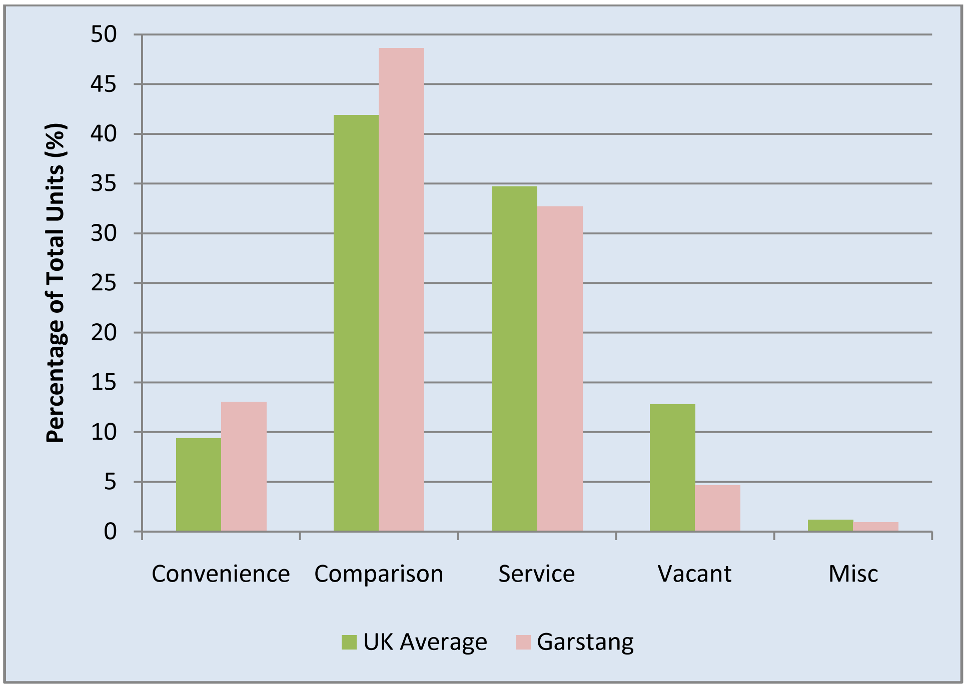
Sector	Number of Units	Percentage of Total Units (%)	
		Garstang	National Average
Convenience	14	13.08	9.41
Comparison	52	48.60	41.90
Service	35	32.71	34.70
Vacant	5	4.67	12.80
Miscellaneous	1	0.93	1.19
TOTALS	**107**	**100.00**	**100.00**

2.150 In contrast, the diversity of the comparison goods offer is slightly more limited. However, there is reasonable representation amongst the comparison goods sub-categories from a number of good quality smaller independent retailers, and a new M&Co store has recently opened, strengthening the clothing and footwear offer in the town. On this basis, we consider that Garstang adequately caters for the comparison goods shopping needs of local residents.

2.151 The service offer in Garstang is similarly healthy, and comprises a selection of good quality family restaurants and cafés in addition to a wide range of professional services such as banks and estate agents, and a number of hairdressers and beauty parlours.

2.152 Garstang also has a popular weekly market, which takes place on Thursdays along the High Street. The range of goods on offer at the market include clothing and footwear, household goods, and garden products.

Chart 2.9 Diversity of Uses in Garstang Town Centre



Retailer Representation and Intentions to Change Representation

2.153 Garstang achieves and overall rating of *'middle'* in MHE's market position index in 2008, with 100 per cent of retailers falling within this category. In comparison with other centres in Wyre, such as Cleveleys and Fleetwood, this is a strong position, and an indicator of the better quality of the comparison goods offer in Garstang.

2.154 Thus, whilst representation from national multiples in the comparison goods sector is not high, we consider that the presence of a range of quality independent retailers, who appear to be vital and viable, more than makes up for this.

Proportion of Vacant Street Level Property

2.155 The findings of our land use audit, summarised in Table 2.9, indicates that there were 5 vacant units in Garstang in February 2011; this equates to a vacancy rate – as measured by the total number of retail and service units – of 4.67 per cent, compared to a national average of 12.8 per cent. On the whole, the vacant units are small in size, however we note that there are two prominent vacancies located along High Street; these are the relocated Co-Op pharmacy and, opposite this, a former flower shop.

Photo 22 Vacant Units in Garstang

Pedestrian Flows (Footfall)

2.156 We are not aware of any recent pedestrian flow counts that have been undertaken in Garstang Town Centre. However, our own observations reveal that the town centre appears busy, with high footfall throughout, particularly on market days, which take place on Thursdays along the High Street.

Accessibility

2.157 Garstang is located on the B6430, with Lancaster to the north, and Preston to the south. Car parking in the centre is adequate, with several options in terms of duration of stay and cost.

2.158 In terms of public transport, Garstang is accessible by bus; however there are no rail links to the centre.

State of the Town Centre Environmental Quality

2.159 Garstang is a particularly well maintained and pleasant centre. The streets are clean, and planting and seating throughout enhances the overall image of the centre. Many of the buildings throughout the centre are of historical interest and they are maintained to a high standard.

Photos 23 and 24 Attractive Public Realm in Garstang


Summary of the Performance of Garstang Town Centre

2.160 The findings of our health check visits indicate that Garstang is a vital and viable town centre, demonstrating high levels of footfall, a strong convenience and service sector, a low vacancy rate and a particularly attractive town centre environment.

2.161 Whilst the comparison offer is slightly more limited in terms of diversity and representation from national retailers, we do not consider this to be of particular concern given the strength and quality of the independent sector in Garstang. There are limited opportunities for expansion within the centre, however we note that much of the development proposed by the Garstang Town Centre Plan (2006) has been implemented.

Poulton-le-Fylde

Movement in the National Retail Rankings

2.162 Table 1 of Appendix 2 indicates that Poulton-le-Fylde town centre has experienced a substantial fall in its position in the national retail rankings from its peak of 775th in 2000/01, dropping 760 places to 1,535 in 2008. The sharp deterioration in the position of the centre since 2000/01 has been relatively consistent and continued to fall between 2003/4 and 2008, when the centre slipped 472 places.

2.163 The decline of Poulton-le-Fylde in the MHE rankings, is significantly greater than the movement recorded in relation to all the other Fylde Coast study centres[7] over that same period. This continued decline in the MHE rankings is of some concern and it is essential that this deterioration is halted.

Diversity of Main Town Centre Uses

2.164 Representation in the convenience sector falls just below average, with the 11 convenience units in Poulton-le-Fylde, accounting for 7.91 per cent of total units, compared to the UK average of 9.41 per cent (Table 2.10). We note, however, that the Booths store in Poulton-

[7] The Fylde Coast study centres for which MHE retail rankings are available over the period 2000/01 to 2008 are as follows: Blackpool, Lytham St Annes, Cleveleys, Poulton-le-Fylde and Fleetwood.

le-Fylde is long and narrow in shape and constrained in terms of size, so that the shopping environment in this store is cramped, and range of goods on offer is limited.

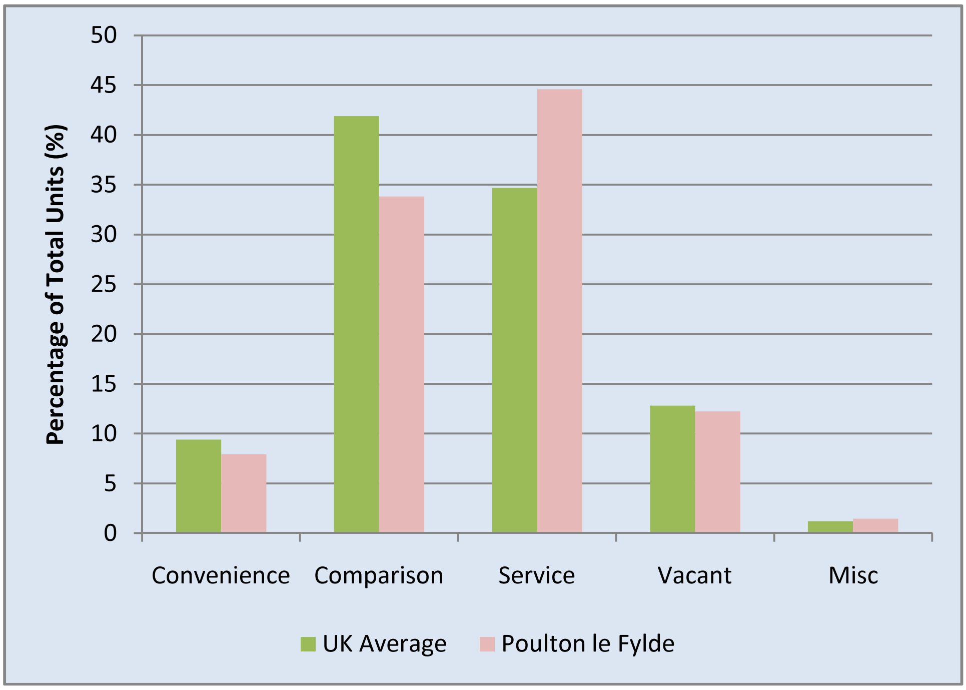
Table 2.10 Summary of Diversity of Uses in Poulton-le-Fylde at February 2011

Sector	Number of Units	Percentage of Total Units (%)	
		Poulton-le-Fylde	National Average
Convenience	11	7.91	9.41
Comparison	47	33.81	41.90
Service	62	44.60	34.70
Vacant	17	12.23	12.80
Miscellaneous	2	1.44	1.19
TOTALS	**139**	**100.00**	**100.00**

2.165 We note also note that the Village Walks centre contains a number of individual traders in the convenience subcategories, including a fishmonger and confectioner.

2.166 Poulton-le-Fylde town centre contains 47 comparison units, equating to 33.81 per cent of total retail and service units in the centre; this is much lower than the UK average of 41.9 per cent. In particular, we note that the important clothing and footwear sub-categories, which form the core of the 'high street' offer, are significantly underrepresented, and we note that the Clarks shoe store and Ethel Austin clothing store have both now closed.

Chart 2.10 Diversity of Uses in Poulton-le-Fylde



2.167 Service uses account for 44.6 per cent of units, which is significantly above the national average of 33.9 per cent. Representation is particularly strong within the *'banks & financial services'*, *'estate agents & auctioneers'* and *'restaurants, cafes, coffee bars, fast food & take-aways'* sub-categories. We note, also, that much of the food and drink provision is of good quality with a focus towards restaurants as opposed to take-aways.

The Potential Capacity for Growth or Change of Centres in the Network

2.168 The main opportunity for development in Poulton-le-Fylde is the redevelopment of the Teanlowe Centre. Presently, the Teanlowe Centre is characterised by a units which are too small and inefficient to attract national multiple retailers, and this is reflected in the high vacancy rate which exists within the centre.

2.169 The Poulton-le-Fylde Town Centre Strategy (2007) identified the opportunity for a new retail quarter for the town centre, in place of the existing Teanlowe Centre and Western Fringe site. The purpose of this redevelopment was to seek to ensure that the town centre was better able to meet shopping needs of its local catchment, and to develop its role as a market town.

2.170 We note, however, that plans for the redevelopment of this centre, possibly in conjunction with an improved foodstore, have been slow to come to fruition, not least as a consequence of the economic difficulties that currently exist in securing funding for such development. However, given the needs that we have identified in our Main Report, the redevelopment of this shopping centre should be prioritised and encouraged by the Council, and we consider that such a development would help to address the deficiencies we have identified in Poulton-le-Fylde in terms of its limited comparison offer, concentration of vacancies within the Teanlowe Centre, and the inferior nature of the Booths store on Ball Street.

Photo 25 Entrance to the Teanlowe Centre and Vacant Unit

Retailer Representation and Intentions to Change Representation

2.171 Retailers in the convenience goods sector are represented by Booths and a Co-Op store, the latter located within the Teanlowe Centre. There are also a number of independent butchers and grocers. Thus, the range and choice of convenience goods shopping in Poulton-le-Fylde is strong.

2.172 The town centre contains a limited number of national multiple retailers, comprising Peacocks, WH Smith and Co-operative Pharmacy. Indeed a significant number of retail operators in the centre across both the comparison and convenience sectors are small independent operators.

2.173 Poulton-le-Fylde achieves a *'middle'* rating in MHE's overall Market Position index although notably, no retailers achieve are classified as within the 'upper-middle' part of the market or higher in the town centre. Fashion retailers in particular are focused on the value end of the market, with Poulton-le-Fylde achieving an overall *'value'* rating in MHE's Fashion Market Position index.

Photos 26 and 27 The Convenience Offer In Poulton-le-Fylde

Proportion of Vacant Street-Level Property

2.174 There were 17 vacant units in Poulton-le-Fylde town centre in February 2011, which equates to 12.23 per cent of all town centre units (Table 2.10). This is slightly below the national vacancy rate of 12.8 per cent. We note, however, that many of the vacancies are located within the Teanlowe centre, reinforcing the need for the redevelopment of this dated shopping centre. The most prominent vacancy is the former Clarks store, located at the entrance to the Teanlowe Centre.

Pedestrian Flows (Footfall)

2.175 We are not aware of any recent pedestrian flow counts that have been undertaken in Poulton-le-Fylde Town Centre. However, our own observations reveal that the town centre appears generally busy throughout.

Accessibility

2.176 Poulton-le-Fylde is situated along the A588, with Blackpool to the south west. There are a number of options in terms of parking, and we consider that provision is plentiful, with the largest car park located adjacent to the Teanlowe centre offering easy access to the town centre.

2.177 Access to Poulton-le-Fylde via public transport is also good, and the centre benefits from bus links with neighbouring towns, and railway station offering links to destinations further afield.

State of the Town Centre Environmental Quality

2.178 The public realm in Poulton-le-Fylde is generally well maintained, and enhanced with several areas of planting and seating. The buildings are attractive, with several buildings of historical and architectural interest. However, the Teanlowe Centre appears dated, and does not sit well with the generally attractive character of the centre, therefore detracting from its overall image.

2.179 Small improvements to the image of a centre can often reap disproportionate benefits, particularly in the smaller centres, where there is little scope for attracting a more diverse range of retailers, and so cosmetic improvements, such as the maintenance of buildings, should be encouraged.

Photos 28 and 29 Attractive Town Centre Environment in Poulton-le-Fylde

Summary of the Performance of Poulton-le-Fylde Town Centre

2.180 Representation in the convenience goods sector is in line with the national average, and the centre benefits from a Booths and Co-Op foodstore, in addition to a handful of independent operators. We consider, however, that the Booths store appears to be slightly constrained, so that the shopping environment, and range and choice of goods that it provides, are not up to the standard that might be found in other such stores.

2.181 Nevertheless, Poulton-le-Fylde has a strong service sector, with a choice of good quality food and drink outlets, and good representation in the banks and estate agents sub-categories. Moreover, we consider that the town centre environment is generally attractive, and pedestrian flows are high throughout.

2.182 Poulton-le-Fylde has experienced a significant fall in MHE's Retail Rankings, and the centre has a comparison retail offer that is underrepresented and skewed towards the lower end of the retail market. The main concern in Poulton-le-Fylde, therefore, is the requirement to refurbish or redevelop the existing Teanlowe Centre, particularly in light of the high number of vacant units concentrated within this shopping centre.

Thornton

Diversity of Main Town Centre Uses

2.183 There were 5 convenience units in Thornton in February 2011, equating to 15.63 per cent of total units, which is notably higher than the UK average of 9.41. Indeed, Thornton is the smallest of the 11 study centres, and serves a predominantly convenience function, served, in the main, by the large Co-Op foodstore.

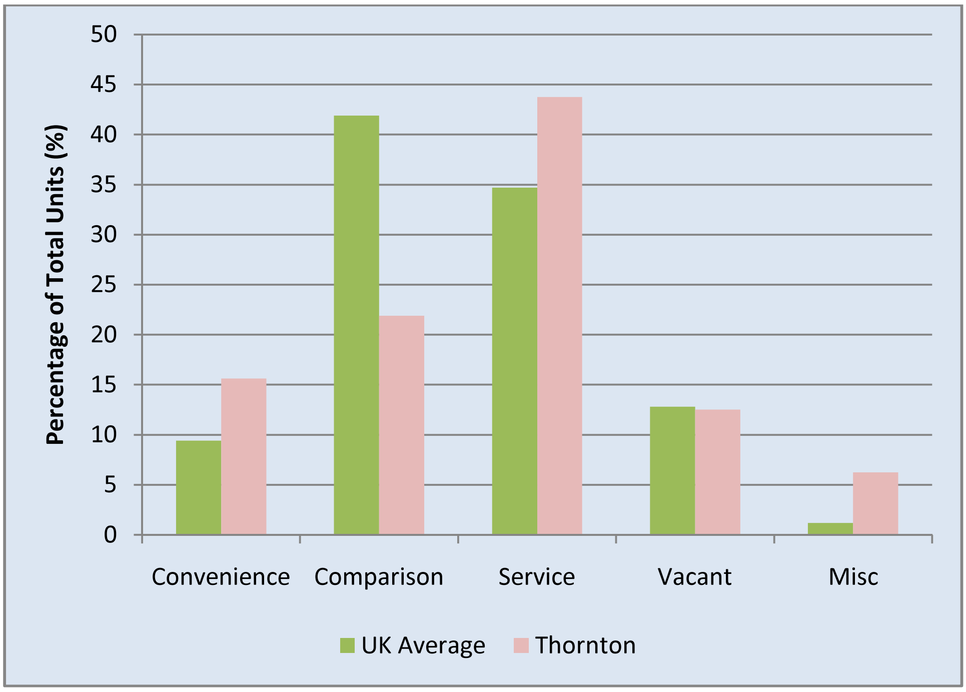
Table 2.11 Summary of Diversity of Uses in Thornton at February 2011

Sector	Number of Units	Percentage of Total Units (%)	
		Thornton	National Average
Convenience	5	15.63	9.41
Comparison	7	21.88	41.90
Service	14	43.75	34.70
Vacant	4	12.50	12.80
Miscellaneous	2	6.25	1.19
TOTALS	**32**	**100.00**	**100.00**

Photo 30 Convenience Provision in Thornton

2.184 The comparison goods sector is significantly under-represented in Thornton with the 7 comparison units accounting for just 21.88 per cent of total retail and service units. However, given that Thornton serves a predominantly convenience and service function, we do not consider the low proportion of comparison uses to be of particular concern.

Chart 2.11 Diversity of Uses in Thornton Local Centre



2.185 Service uses are well catered for in Thornton, with the 14 service units accounting for 43.75 per cent of total units. In particular we note a large proportion of *'restaurants, cafes, coffee bars, fast food & take-aways'* (5 units).

Retailer Representation and Intentions to Change Representation

2.186 Retail provision in Thornton is suitably anchored by the large Co-Op store. There is also an independent butcher, which appears to be popular and busy. Insofar as comparison retail is concerned, there is no representation from national multiples; however, we do not consider this to be of concern, given the small size of this centre.

Proportion of Vacant Street Level Property

2.187 There were 4 vacant units in Thornton in February 2011, equating to a vacancy rate of 12.5 per cent, which is slightly below the UK average of 12.8 per cent. All of the vacant units were small in size, and we did not note any concentrations of vacancies.

Pedestrian Flows (Footfall)

2.188 Our own observations of the centre indicate that the highest pedestrian flows are in and around the Co-Op store, with the remainder of the centre appearing relatively quiet.

Accessibility

2.189 Thornton is situated on the B5268, with Blackpool to the south west. Car parking provision is good for a centre of this size, and the centre benefits from good accessibility via bus.

State of the Town Centre Environmental Quality

2.190 Thornton is an attractive and compact centre, which is well maintained, with areas of green space, and seating. The centre is clean, and there is little evidence of litter.

Photo 31 Attractive Public Realm in Thornton

Summary of the Performance of Thornton Town Centre

2.191 Overall we consider that Thornton is a vital and viable centre, which serves an important role as a convenience and service centre for residents of its immediate catchment. Whilst we have noted that the comparison retail offer is significantly under-represented, we do not consider that this deficiency should be of particular concern, given that Thornton performs a predominantly convenience and service function, and we would expect residents to travel to larger centres within the catchment in order to undertake higher order comparison goods purchases.

Overall Summary of the Performance of the Fylde Coast Centre

2.192 Blackpool Town Centre serves a crucial role as the sub-regional centre for the Fylde Coast, with the smaller town and district centres within Blackpool, Fylde and Wyre all performing valuable roles as both centres of retail and services, and as a focus for community activities for the residents of their immediate catchment. The centres of the Fylde Coast are also unique in their ability to attract visitors from a wide catchment, and in the case of Blackpool, it is important that the town centre is re-established as a national leisure destination of choice.

2.193 With significant support from the Council and other public and private partners, plans have recently been put into place to promote Blackpool's resort regeneration. However, if Blackpool is to fully maximise the benefits of such investment, there also needs to be a qualitative and quantitative step change in the retail offer of the town centre, so as to complement the leisure and tourist sector. This will ensure that the Council and local businesses are able to make the most out of an improved leisure and retail offer by encouraging visitors to stay longer, and spend more.

2.194 Of the remaining centres, we are most concerned with the health of Fleetwood, Poulton-le-Fylde, and, to a lesser extent, Cleveleys and Kirkham. So far as Fleetwood is concerned, we note its fall in the MHE rankings, and its vacancy rate, which is slightly above the national average. The town's comparison goods offer is limited, particularly in the important clothing sub-categories, and the quality of the offer is skewed towards the 'lower middle' and the 'value' end of the market. Indeed, it is likely that Fleetwood's comparison sector has suffered, to some extent, through competition with the out-of-centre Freeport Shopping Village.

2.195 We note that Poulton-le-Fylde has also experienced a significant fall in the retail rankings, and the comparison retail offer is under-represented and again skewed toward the value end of the market. The main concern in Poulton-le-Fylde is the requirement to refurbish or redevelop the Teanlowe Centre, which currently detracts from the overall viability of the centre.

2.196 As a second priority, Cleveleys and Kirkham would benefit from qualitative improvements in their comparison offer, which at present is limited, and again skewed towards the lower end of the market, so that there is limited choice for local residents. In respect of Kirkham, Spreadsheet 10a of Volume 2 demonstrates that this lack of choice in some comparison goods sub-sectors has resulted in 33.36 per cent of the clothes and shoes expenditure available to residents of Kirkham's local Zone 14 being directed to Preston City Centre.

3 FYLDE COAST EDGE OF CENTRE AND OUT OF CENTRE PERFORMANCE

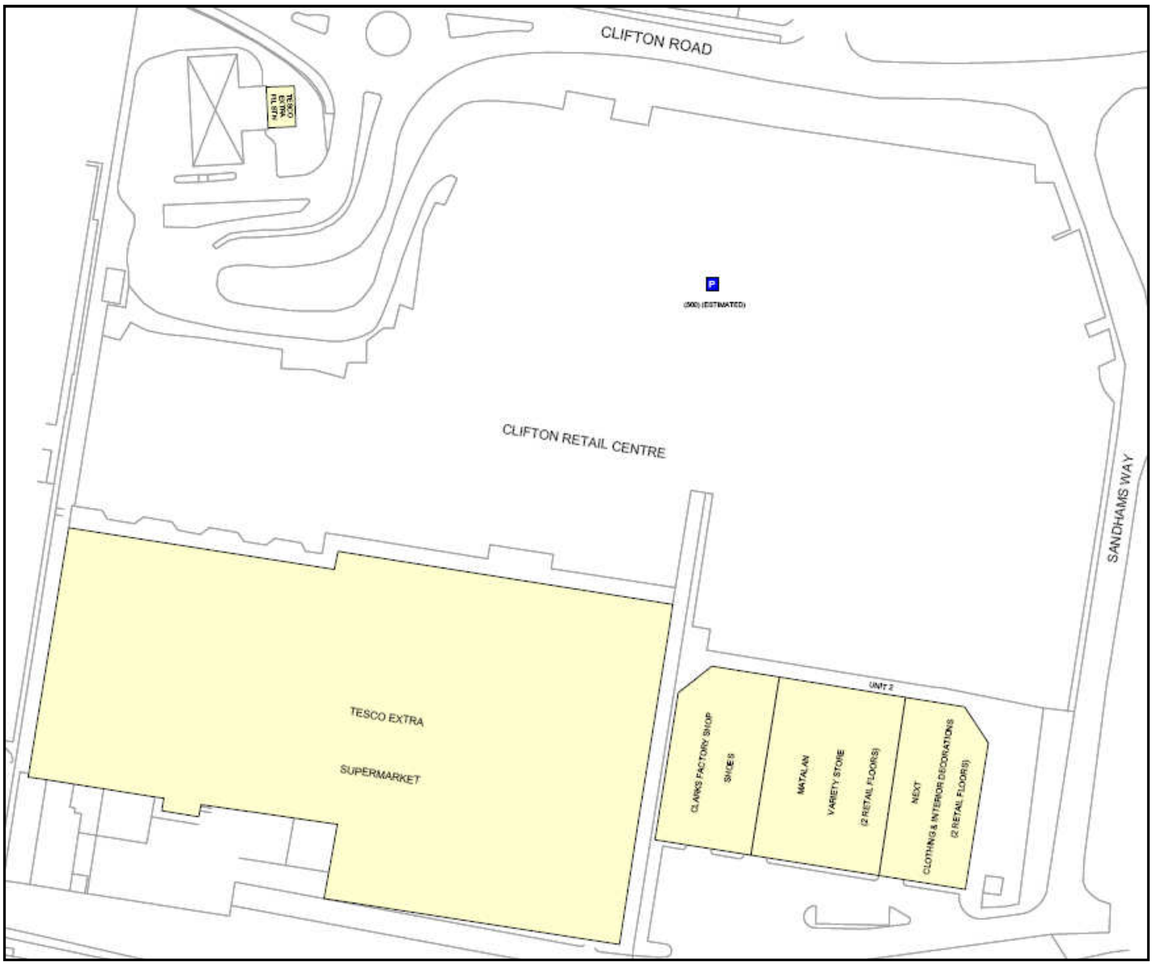
3.1 Annex D of PPS4 requires that local authorities monitor the amount of retail, leisure and office floorspace in out of centre locations as part of their ongoing health checks. Whilst we do not have access to accurate floorspace data for all of the main edge and out of centre destinations on the Fylde Coast, the findings of our household survey can provide information in relation to the performance of these destinations.

3.2 In Blackpool Borough there are two main out of centre retail parks; Clifton Retail Park, and Blackpool Retail Park. We note, however, that the latter sits on the boundary of Blackpool and Fylde Boroughs, however, for the purposes of our study, the zoning system requires that it is classed as being within Blackpool Borough.

3.3 Elsewhere within the Borough of Blackpool, Cherry Tree Retail Park also attracts a notable proportion of the comparison expenditure of catchment area residents, with a turnover in £29.46m in 2010.

3.4 Clifton Retail Park is located to the south east of Blackpool Town Centre, off Clifton Road, and comprises a Tesco Extra foodstore, Clarks, Matalan and Next.

Plan 3.1 Clifton Retail Park GOAD Plan



3.5 Clifton Retail Park has a total retail floorspace area of 16,540 sq.m gross, of which 12,670 sq.m gross is taken up by the Tesco foodstore. The household survey indicates that the comparison goods turnover of the retail park, including the comparison turnover of the Tesco Foodstore, is £33.27m in 2010. This implies a comparison goods sales density of £6,129 per sq.m sales, which, although high, is as expected, given that the goods on offer at Clifton Retail Park are predominantly non-bulky, and our own visit to the retail park indicates that it is a popular and busy location for comparison goods shopping.

3.6 The analysis set out in Table 5.7 of our Volume 1 Main Report indicates that the Tesco foodstore at Clifton Retail Park has a survey derived convenience goods turnover of £45.54m, so that it is trading slightly below the company average turnover of £49.70m. Our own visit to the store, however, demonstrates that it is busy and popular, so that despite its turnover being slightly below the company average, we do not have concerns regarding its ongoing viability.

3.7 Blackpool Retail Park (also known as Squires Gate Retail Park), is located on the administrative boundary of Blackpool Borough and Fylde Borough, adjacent to Blackpool International Airport. Blackpool Retail Park comprises nine units, which together provide approximately 18,810 sq.m gross of retail floorspace, including the Morrisons foodstore, which has a total retail floorspace of 7,040 sq.m gross.

Plan 3.2 Blackpool Retail Park GOAD Plan

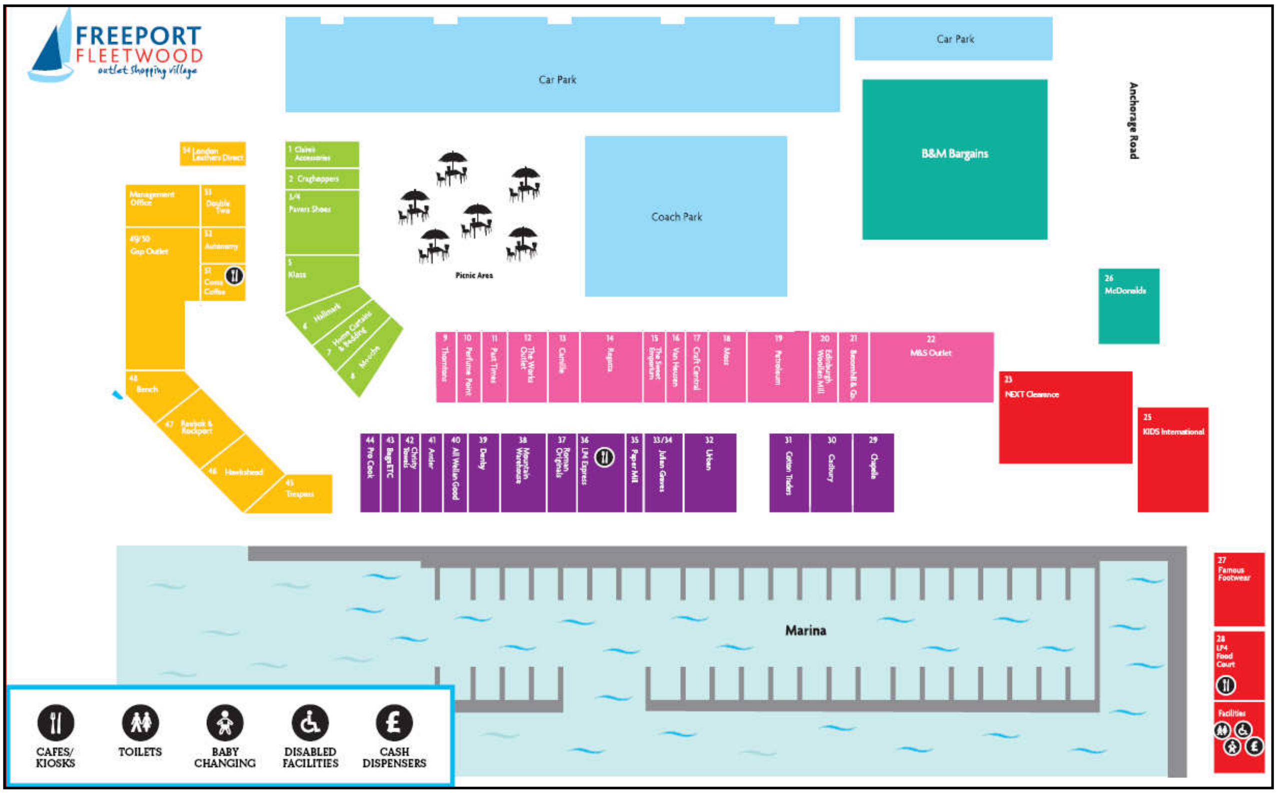
3.8 The household survey indicates that the comparison goods turnover of the retail park, including the comparison turnover of the Morrisons Foodstore, is £52.63m in 2010. This implies a comparison goods sales density of £6,113 per sq.m sales, which we consider to be relatively strong.

3.9 The analysis set out in Table 5.7 of our Volume 1 Main Report indicates that the Morrisons foodstore at Blackpool Retail Park has a survey derived convenience goods turnover of £45.23m, so that is trading £13.06m above the company average of £32.17m. This ties in with our own observations of the store, which demonstrate that it is a busy and popular destination for convenience goods shopping.

3.10 Freeport Shopping Village is located on the edge of Fleetwood Town Centre, and comprises approximately 53 retail units, and a small number of food and drink units. The shopping village appears healthy, with relatively few vacancies, and appears to be a popular destination amongst both residents and visitors.

3.11 The vast majority of the comparison retailers operating from Freeport are national multiples, and are predominantly focused towards the middle of the retail spectrum in terms of quality, with an emphasis on outdoor and sports retailers within the clothing sector.

Plan 3.3 Freeport Shopping Village Store Guide[8]



3.12 The environmental quality of the Freeport Shopping Village is pleasant, with seating, a children's play area and ample free parking.

8 Source: http://www.freeport-fleetwood.com/map.php

APPENDIX 1

Management Horizons Europe Retail Rankings

Movement Within MHE Retail Rankings												
MHE Venue	**Location Grade MHE 2008**	**Fashion Rank 2008**	**1995-96 Ranking**	**1998-99 Ranking**	**2000-01 Ranking**	**2003-04 Ranking**	**2008 Ranking**		**Movement 1995/6-2008**	**Movement 1998/9-2008**	**Movement 2000/1-2008**	**Movement 2003/4-2008**
Blackpool	Regional	106	57	69	62	89	98		-41	-29	-36	-9
Blackburn	Sub Regional	171	130	123	153	135	141		-11	-18	12	-6
Preston	Major Regional	48	42	49	53	34	42		0	7	11	-8
Lytham St Annes	Major District	437	360	395	406	391	336		24	59	70	55
Cleveleys	District	509	-	-	450	404	387		-	-	63	17
Garstang	Local	1604	-	-	-	1449	1950		-	-	-	-501
Poulton-le-Fylde	Local	1125	953	826	775	1063	1535		-582	-709	-760	-472
Fleetwood	Minor District	799	620	461	572	716	731		-111	-270	-159	-15
Kirkham	Local	1475	-	-	-	1545	1716		-	-	-	-171
South Shore	Minor District	1475	-	-	-	1449	1095		-	-	-	354
Bispham	Local	-	-	-	-	1545	1325		-	-	-	220

Source: Management Horizons Europe (MHE)

APPENDIX 2

October 2009 GOAD Plan for Blackpool Town Centre


Experian
MECCA
BINGO
FUNNY GIRLS
NIGHTCLUB
CENTRAL LIBRARY
POSTAL SORTING OFFICE
PLACE OF WORSHIP
WINTER GARDENS
ENTERTAINMENT CENTRE
MARKET
BHS
VARIETY STORE
MARKS & SPENCER
VARIETY STORE
DEBENHAMS
DEPARTMENT STORE
T K MAXX
CLOTHING
PEACOCKS
CLOTHING
SPORTSDIRECT.COM
SPORTS GOODS
CORAL ISLAND
BINGO & AMUSEMENTS
VACANT OUTLET