APPENDIX 1

Ribble Valley

Service Centre Health Checks 2013

CLITHEROE / LONGRIDGE / WHALLEY

CONTENTS

1.0 INTRODUCTION

1.1 This report provides a review of the three main retail service centres (town centres) within the Borough of Ribble Valley, and has been conducted to provide evidence to underpin and inform the Council's Local Plan.

1.2 The study will assess the vitality and viability of each of the three centres in the form of a 'health check' exercise in line with national policy, the National Planning Policy Framework (NPPF) published in 2012.

1.3 NPPF does not require Town Centre Health Checks to be undertaken, however, it does emphasise the need for local authorities to monitor the health of their town centres and determine how they are changing over time and includes a section called "Business and Economic Development", which has replaced the former Policy Statement 4 (PPS4) for town centres titled: PPS4 "Planning for Sustainable Economic Growth".

1.4 However, PPS4 remains the only and most recent policy guidance specifically targeted towards town centres and as such therefore, this health check process has been assessed based on those same core principles in line with other assessments throughout the country.

1.5 Recent experience and research highlights that the future context for retailing in town centres will be very different and that centres must therefore adapt to the changing policy and economic landscape. Along with the growth of out-of-centre retail development, the economic climate has had an impact on consumer spending which in turn has had a negative impact on the vitality of the high street nationally which has led to an increase in vacancy rates within many town centres, as retailers attempt to compete in this challenging market and property owners struggle to let their shops to retailers.

1.6 The Borough of Ribble Valley contains 3 key retail and service centres serving the local community itself and the surrounding settlements within Ribble Valley with a total population of approximately 57,000, the catchment areas to these destinations in the wider region are limited by the catchments of the regional centres in neighbouring districts such as Blackburn and Preston predominantly.

1.7 Clitheroe, Longridge and Whalley, like other centres nationally, need to play an important role in serving the requirements of the local community on a day-to-day basis. They form a focal point for the surrounding area and provide a wide range of services that are accessible to the population, including retail, employment, leisure along with such things as financial and health services. Vital and viable town centres help to foster local pride, promote identity and contribute towards the aims of sustainable development.

1.8 All three centres themselves are constrained to some extent by their historic street layouts and development density, however recent developments have occurred on some edge-of-centre sites, which either added to or complimented the development mix, but such edge-of-centre can also act as a standalone retail destination to a certain extent.

1.9 In 2008, the Ribble Valley Employment Land and Retail Study was produced which contained a market town health check assessment of Clitheroe, Longridge and Whalley respectively and this report reviews and refreshes those elements undertaken within that study also, and in particular, it takes account of recent planning policy changes such as the introduction of the National Planning Policy Framework (NPPF) and the changing economic situation since the Employment Land and Retail Study was completed. .

1.10 This Health Check assessment will form part of the evidence base for policies and proposals in the Ribble Valley Local Plan. As part of the plan preparation process, the Council is required to review and assess the vitality and viability of its service centres (town centres) to help ensure an adequate supply of services and facilities to meet the requirements of the local population both currently and in the future.

2.0 OVERVIEW & METHODOLOGY

2.1 Ribble Valley (population 57,132, as of the 2011 Census) is a largely rural area covering 226 square miles in the east of Lancashire (see Figure 1). To the south it is bounded by the M65 and conurbation of Blackburn, Burnley and Central Lancashire towns. It comprises numerous picturesque villages, but the key settlements are Clitheroe, Longridge and Whalley. The north of Ribble Valley reaches as far north as Lancaster to the west and Yorkshire to the east.

2.2 The Health Check process defines 'vitality' as a measure of how lively and busy a retail centre is. 'Viability' is defined as a measure of capacity to attract ongoing investment for maintenance, improvement and adaptation to changing needs. Together these measures give an indication of the health of a retail centre and, when used consistently over a period of time as part of a retail centre health check, can demonstrate changes in performance that can inform future decision making. A health check measures the strengths and weaknesses of a town centre and analyses the factors, which contribute to its vitality and viability. A brief description of key Vitality and Viability Indicators assessed in this report are provided below.

2.3 Vitality indicators qualitatively assess retail performance, and as such are largely based on shopper and retailer perceptions. Viability indicators are more quantitative and are based on an analysis of retail composition, floorspace use and retail rents. Information has been drawn from town centre audits, a review of marketed and vacant properties, national retail statistics and trends and the retailer survey.

2.4 As explained earlier, the specific and detailed advice previously contained within PPS4 regarding the types of evidence and indicators Local Authorities should collect still provide a relevant and useful basis to measure both the health of the centres and the potential future impact of proposed retail and other centre floorspace uses in the borough. The study has been produced using Indicators taken from PPS4 will to help gain a proper understanding of the vitality and viability of each centre:

- Diversity of uses;
- Amount of retail, leisure and offices in edge and out-of-centre locations;
- The potential capacity for growth;
- Retailer representation;

- Shop rents;
- Proportion of vacant street level property;
- Pedestrian flows;
- Accessibility;
- Perception of safety / occurrence of crime;
- Environmental quality.

2.5 Modern consumer behaviour in the UK has become far more complex in recent decades. People are increasingly shopping in different ways, buying from a variety of different channels and locations dependent on where we are in the day and what we are doing. Buying patterns are also driven by convenience (does it fulfil the need at the time, and does it save some time?).

2.6 There are now a diversity of shopping opportunities – local, out-of-town, town centre, service station, online, travel locations, TV shopping, mobile shopping, airport retailing – the choices are increasing all the time. However having such a choice with retail growth slowing, or in the case of non-food declining, means that not all these locations and channels are necessarily profitable. The challenge for the retailer is to provide the choice of multi channel shopping, but to make sure that overall it is a profitable model. So there is fragmentation of shopping – people go out-of-town infrequently for major shopping, top-up locally and in fill on the move as well as order online.

2.7 Technology has been a key driver of this change. The internet has become far more accessible, even more so with the advent of smartphones, tablets and iPads, and more user friendly. New technology is also providing a diversity of payment methods, which will expand so we will have cash, credit, cards, online, mobile touch, and more.

2.8 A recent report published by Experian in 2012 entitled Town Centre Futures 2020, sets out how the UK's town centres will have changed by the end of the decade and what town centres, high streets and retailers need to do to survive and thrive.

2.9 Though facing tough challenges Experian's report stresses that the UK's town centres can survive and thrive beyond 2020, provided they understand and cater to the distinct needs of their local communities, while embracing technology to boost the high street experience.

2.10 Retailers will have to compete harder in order to counter the increase in online shopping. Town centres in particular will need to market themselves as convenient hubs for picking up products ordered online if they are to thrive into the next decade, whilst at the same time, they must cater for an ageing population, it adds, calling for them to focus on face-to-face service and opportunities for socialising and leisure activities.

2.11 Experian predicts that in 10 years' time there will be three million more people in the UK over the age of 70, and in order to thrive, town centres will need to offer the kind of facilities valued by older people, such as health services, and safe and accessible shopping areas.

2.12 Town centres have a careful balancing act to play, and must fulfil the modern need for convenience and value of those with increasingly limited resources and incomes, but not to the detriment of quality and service sought by older and more affluent consumers. At the same time they will need to embrace technology to enrich the shopping experience by combining online shopping with the often more convenient option of collecting goods in the town centre.

2.13 More shops will need to adopt "click and collect" and retailers should embrace mobile commerce and social media to develop their online presence as the increase in technology and social media will have an impact everywhere. The report also highlighted that in many cases, these shoppers are from hard-pressed and rural consumer groups that are looking for both the choice and value that online offers and heavily influencing the health of town centres.

2.14 The vitality and viability of any town or service centre is dependent not only on its shopping offer but also on the mix of uses which add to the experience and make the centre more attractive to those who live, work and visit there. Offices can generate lunchtime and top-up shopping trips whilst leisure and entertainment facilities, cafes, bars and restaurants add variety and can assist in promoting the evening economy. Educational establishments can also add to the number of young people in the centre during the week contributing to vibrancy.

2.15 Five categories of retail type are used, based on the categories defined in GOAD Summary Reports, which are recognised as the standard method employed for most

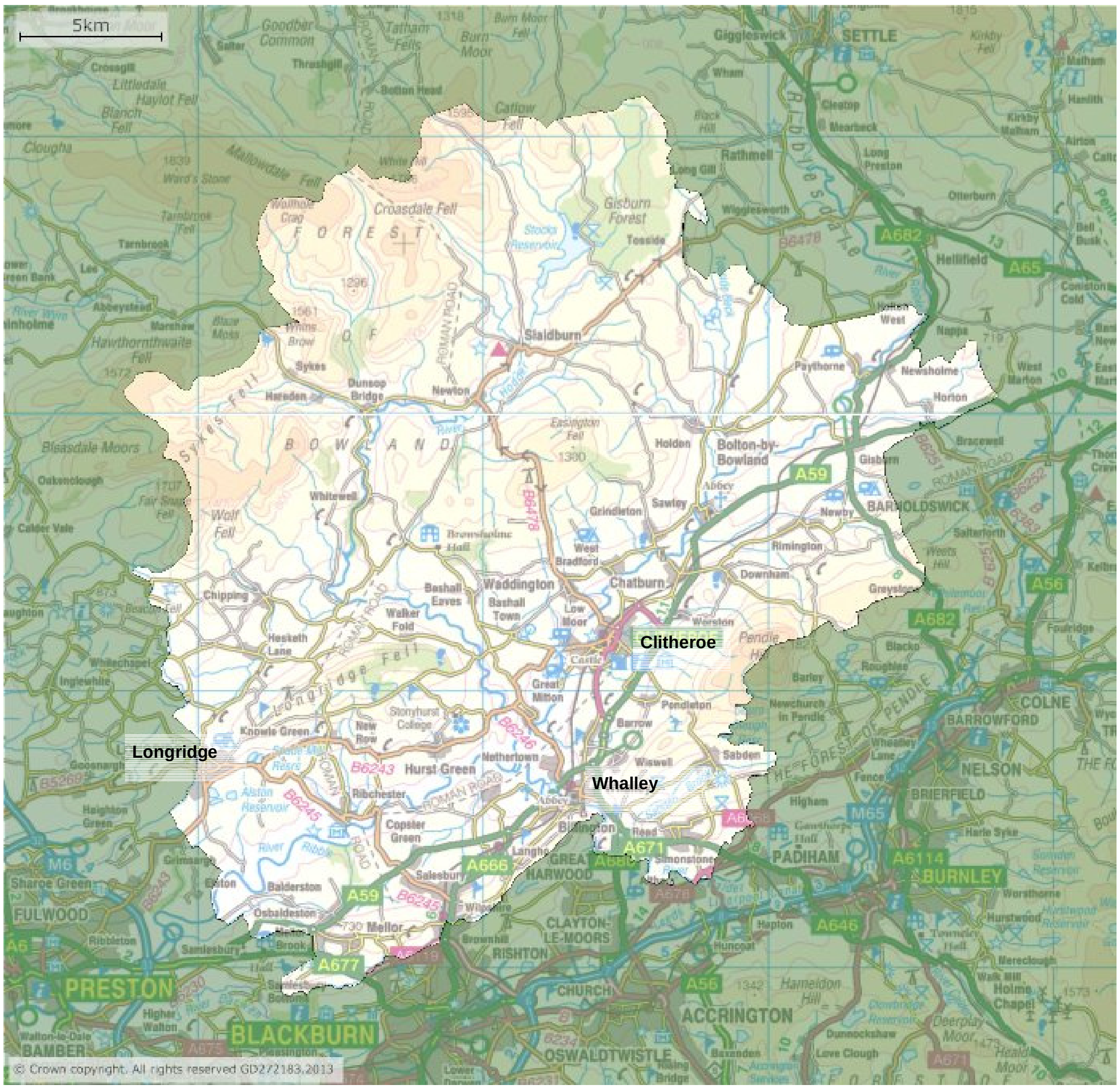
Health Check monitoring. These types are described below alongside corresponding Use Class categories as follows: -

- Convenience Retail – A1 shops which are visited for daily needs including grocery food shopping, general stores, supermarkets, green grocers, bakers, butchers etc… and other daily needs such as newspapers and cigarettes as provided by newsagents;
- Comparison Retail – A1 shops which are visited only occasionally for higher order goods which people often compare prices for from different retailers. These include shops selling electrical goods, books, clothing, and furniture etc.
- Services – a more diverse category which comprises: Retail Services, including A1 hairdressers, beauty salons etc.; Leisure Services consisting of A3 restaurants, A4 drinking establishments, A5 take-aways, and D2 leisure facilities (gyms, fitness clubs etc.); Financial and Business Services includes A2 Professional Services (estate agents, accountants etc..), B1a offices (solicitors etc.) and D1 public services (such as galleries, museums etc); and Transport Services (which include sui generis taxi offices, rail/bus ticket offices etc);
- Vacant ground floor units;
- Miscellaneous or 'other retail outlets' (GOAD) (i.e. Post Offices) which are discounted from GOAD retail services and financial and business services categories.

2.16 As well as outlet data, this health check will monitor the 'diversity mix' of each centre by number of units under the 'health balance' categories: Convenience, Comparison, Service, Vacant and Miscellaneous. In future, these can be benchmarked wherever possible to measure the performance of each town centre against other town centres of similar size and characteristics as well as data from previous studies.

3.0 SERVICE CENTRE PROFILES

3.1 The Map below shows the location of Ribble Valleys' 3 Service Centres. As the map shows each of the centres are located nearby the more urban locations of Preston, Blackburn and Burnley, which each have significantly larger town centres with a greater share of national multiple retailers.



Source: ONS 2013

3.2 As the main market town within Ribble Valley, Clitheroe is identified as a key service centre. It is the largest town in the Ribble Valley with a population of approximately 14,000 people and located approximately 10 miles north of Blackburn and 20 miles north east of Preston. The town centre also serves a wide catchment population from its rural hinterlands. The nearest motorway, the M65, is eight miles away. The train station has regular services to and from Manchester.

3.3 The town is a traditional market town, built around a 12th century Norman Castle, and expanded upon the cotton industry in the 18th and 19th centuries, which has since disappeared and local industry is now largely based on cement, clothing and chemical manufacturing. Retailing in Clitheroe town centre is focused on Castle Street, King Street, Moor Lane and Wellgate. There are no covered shopping parades in the town. The market is located off New Market Street and is held three times a week - Tuesdays, Thursdays and Saturdays - but also smaller general goods market is sometimes held on Fridays. The key features and attractions include a higher than average selection of independent and specialist retailers, along with the Castle and surrounding grounds, the Market, cafes, bars and restaurants and also Grand theatre venue.

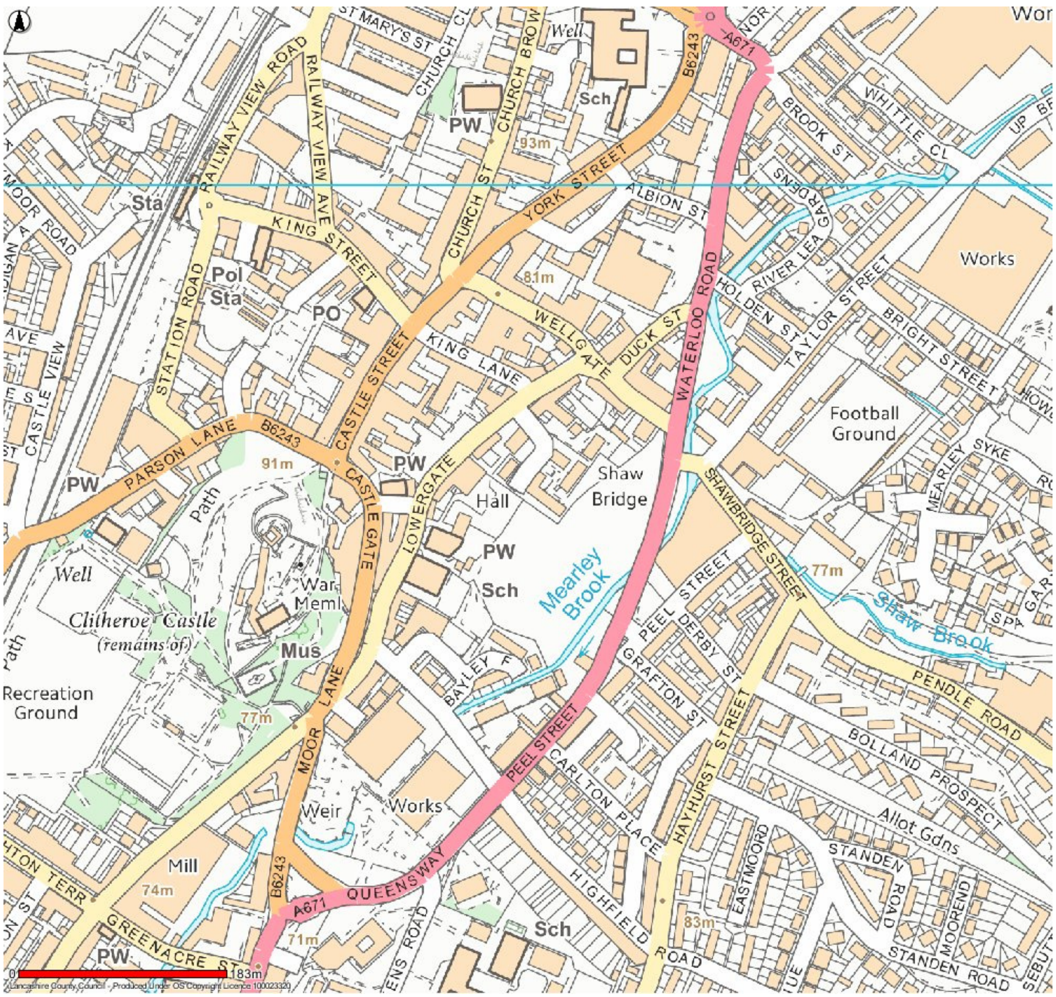
3.4 Many local residents commute out of the town for work, and as such are more likely to shop and use services at more modern and more convenient destinations in and around Preston, Blackburn and Accrington. Due to its location and catchment population however, Clitheroe town centre should be able to sustain a good diversity of uses to complement the retail function. In the service sector, uses already present in the town include banks and building societies, hairdressers, dry cleaners, travel agents and estate agents. There are also a number of smaller professional offices and the administrative office of the Borough Council, but Clitheroe Town Centre is not traditionally a major office location.

3.5 Clitheroe has a range of leisure and tourist facilities, although some of are located out-of-centre. Within the town centre are The Grand Theatre and Arts Venue (that hosts events including theatre, music, film as well as other community and cultural activities) and Clitheroe Castle and Museum (which houses both permanent collections and special exhibitions), also the smaller Platform Art Gallery and Tourist Information Centre adjacent to the train station and public transport interchange provide additional services.

3.6 The Clitheroe Market site is used for events and other activities. The evening economy within Clitheroe is limited although has improved slightly since the development of The Grand Venue. There are a number of restaurants, pubs, bars and a nightclub in the centre also. In summary, excluding retail and business services there is a range of other uses in Clitheroe Town Centre that contribute to the vitality and viability of the town, however, further expansion and diversity may be limited to edge of centre sites due to the historic built character within the identified retail core.

3.7 Clitheroe has recently appeared in the 'Sunday Times Best Places to Live' top 10 (compiled by Experian), which takes into account transport links, quality of schools and natural beauty. The towns were also graded on their low crime rates, property prices, cultural life and unemployment figures.

3.8 Map of Clitheroe: -

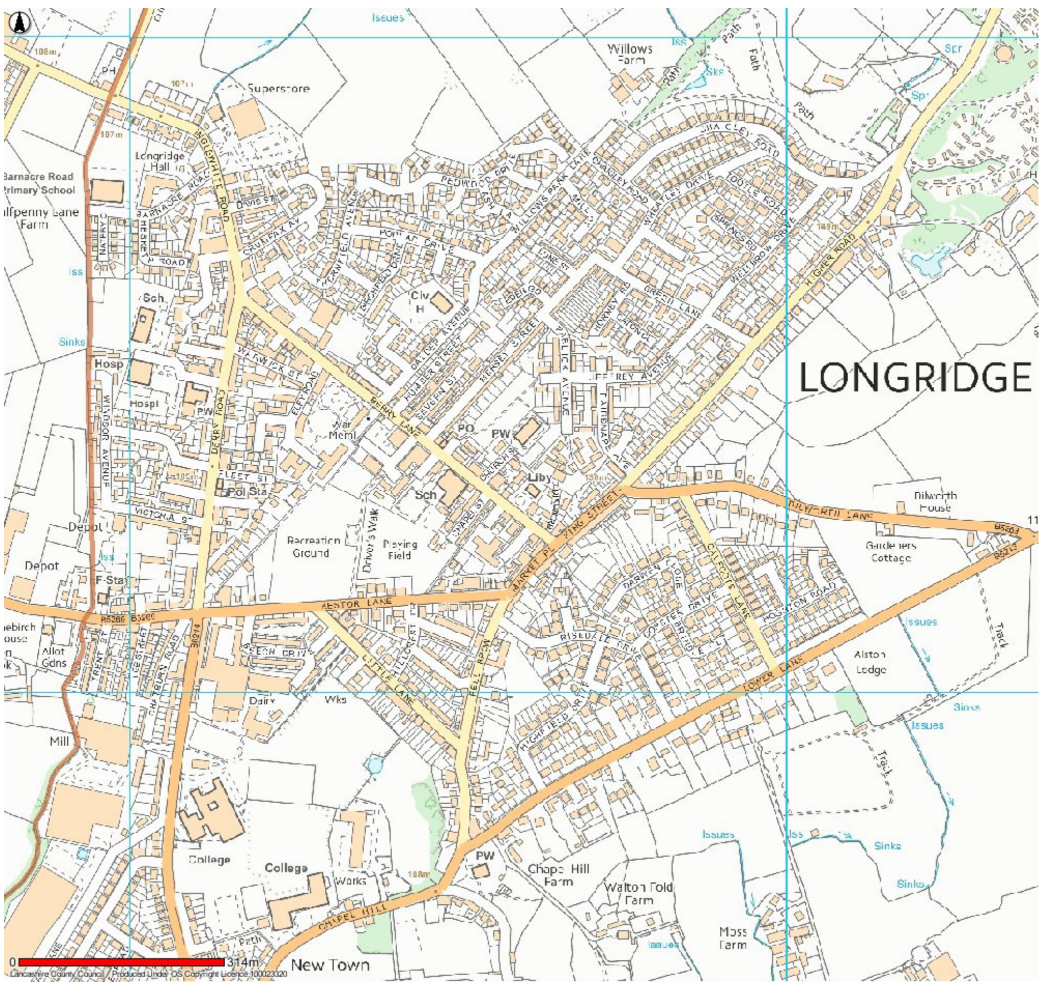


3.9 Longridge is the second largest town in the Ribble Valley, after Clitheroe with a population of approximately 8000. The town's population expanded rapidly in the 18th and 19th centuries around agriculture, cotton weaving and quarrying. It has since declined but continues to be an important service centre for surrounding villages.

3.10 The town centre is less than five miles from the M6, and approximately eight miles north of Preston. Many residents commute to Preston and the main towns of Lancashire to work and as with Clitheroe, they are more likely to shop at modern and more convenient destinations. It does not have a train station.

3.11 Retailing in Longridge is focused on Berry Lane and to a lesser extent, Derby Road and Inglewhite Road. The town has weekly market is held at the Civic Hall on Thursdays which has declined in recent years. Rents are in the region of £10-15 per stall for the afternoon and there is also little evidence that the market is used at all for regular shopping or considered to be part of Longridge's core retail offer. Key attractions include pubs, café's, independent shops and services. Longridge is also well used as a stop-off point for visitors to the Forest of Bowland and Beacon Fell Country Park.

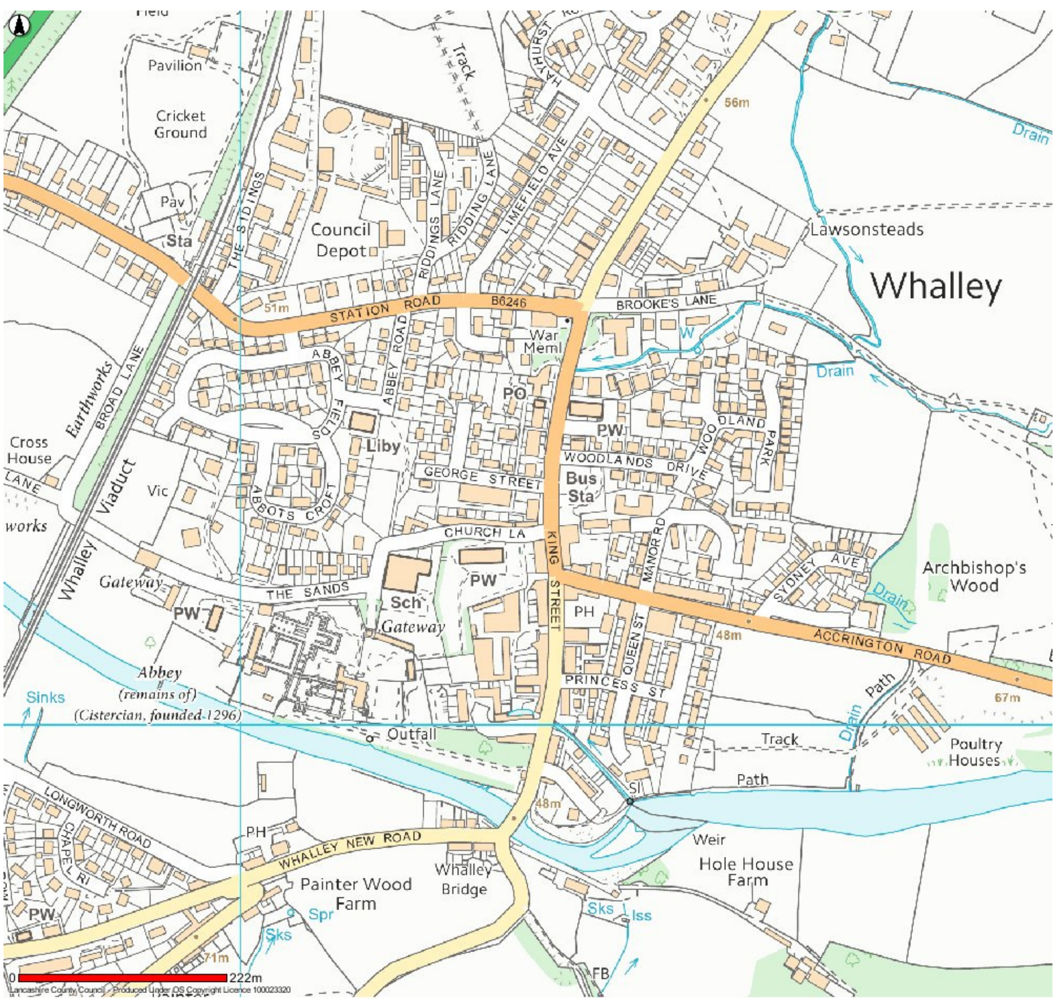
3.12 Map of Longridge: -



3.13 Historic Whalley has a population of approximately 4000. Being just less than five miles from Clitheroe, it depends very much on its larger neighbour for a number of key services, however for its current size does contain some services and retail provision.

3.14 Whalley grew significantly around the Abbey and expanded to nearly 12,000 people in the 19th century. It has since declined following the demise of the weaving and quarrying industries in the surrounding area, and more recently agriculture. As with Clitheroe and Longridge, many of Whalley's residents commute to other towns in Lancashire to work, and again as such most residents are likely to shop at more modern, convenient destinations. Retailing in Whalley is focused on King Street, and key attractions include the 14th century Abbey, pubs and cafes. The town has in the past held occasional farmers markets but has no permanent market. The train station has regular trains to Manchester and Clitheroe.

3.15 Map of Whalley: -



4.0 HEALTH CHECK ANALYSIS

Diversity of Uses

4.1 The following section provides a breakdown of retail uses by goods type for each of the town centres. Information has been sourced from retail audits undertaken in February 2013. The primary purpose of this indicator is to monitor amount and type of town centre uses by Use Class in town centre areas to inform on emerging planning policies relating to specifically protecting the amount of A1 retail in Primary Shopping Areas and Primary Shopping Frontages in accordance with Paragraph 23 of the NPPF. The table below highlights the diversity across different uses within each of the centres.

Table 1: Retail Units by type: -

Outlet Type	Clitheroe	Longridge	Whalley
Convenience			
Bakers	4	2	0
Butchers	2	2	1
Greengrocers & Fishmongers	1	1	0
Groceries & Frozen Foods	8	6	0
Off Licences & Home Brew	2	1	1
CTN & Convenience	2	3	2
Total Convenience	19	15	4
Comparison			
Footwear & Repairs	3	1	2
Mens & Boys Wear	4	1	0
Womens, Girls & Childrens	16	4	1
Mixed & General Clothing	4	1	6
Furniture, Carpets & Textiles	14	5	2
Books, Arts, Crafts, Stationers & Copying	11	3	1
Electrical, Home Ent, Telephones & Video	11	2	0
DIY, Hardware & Household Goods	2	8	2
Gifts, China, Glass & Leather Goods	1	3	1
Cars, Motor Cycles & Accessories	2	2	0
Chemists, Toiletries & Opticians	8	3	2
Variety, Department & Catalogue Showrooms	2	0	0
Florists & Gardens	3	2	1
Sports, Toys, Cycles & Hobbies	3	0	0
Jewellers, Clocks & Repairs	5	1	0
Charity, Pets & Other Comparison	12	3	0
Total Comparison	101	39	18
Service			
Restaurants, Cafes, Fast Food & Take Away	15	12	8
Hairdressing, Beauty & Health	18	8	6
Launderettes & Dry Cleaners	2	1	1
Travel Agents	2	1	0
Banks & Financial Services	9	6	1
Building Societies	2	0	0
Estate Agents & Auctioneers	8	6	4
Total Service	56	34	20
Miscellaneous			
Employment, Careers, Pos & Info	2	2	1
Vacant	11	5	2
Total Miscellaneous	13	7	3
Service Centre Total Outlets	189	95	45

4.2 A full breakdown of units by sector for each of the centres of Clitheroe, Longridge and Whalley is provided at Appendix A, B and C respectively, this also provides comparisons between the 2008 studies undertaken against the present day to give an indication of any significant changes, however these revealed that very little had changed over the 5 year period.

4.3 Tables 1 showS that overall, Clitheroe accommodates just over twice the amount of floorspace dedicated to retail goods than in Longridge, and seven times the amount in Whalley. Retail floorspace increased from significantly following development of the Homebase store in 2009, providing an addition 4587 sqm of floorspace. Table 2 also shows that Clitheroe has the highest percentage of premises and floor space dedicated to A1 class use (shops).

4.4 Longridge appears to have a slightly higher percentage of premises /floorspace dedicated to professional and financial services (A2). Previous office study conducted by Lancashire County Council has indicated that A2 premises make up the majority of town centre office supply. An implication for the future may be pressure upon other retail uses to change to A2 if financial and professional services realise an opportunity to cluster. In Longridge, retail floorspace is dominated by convenience goods (56 percent), which comprises three supermarkets – Booths, Sainsbury's (edge-of-centre) and Coop as well as other small retailers. Floorspace dedicated to comparison goods is equally split by bulky and non-bulky (each 22 percent).

4.5 Whalley has the highest proportion of premises / floorspace dedicated to more 'lifestyle' or leisure uses such as restaurants, cafes and pubs, which is creating a thriving emerging evening economy. However, as town centre space is constrained, this may incur pressure upon other retail uses to change to restaurants, pubs and bars. This could negatively impact upon retail composition and incur a less sustainable mix of retail types. Whalley is by far dominated by floorspace dedicated to non-bulky comparison goods. The remainder is evenly split between convenience and bulky comparison goods. The proportion of convenience floorspace is low.

4.6 Clitheroe is the only town centre to have a permanent market site which operates on Tuesdays, Thursdays and Saturdays, which consists of 41 outdoor cabins that are all reportedly currently fully occupied. There are also covered further stalls, which are occupied on a seasonal basis. Plans are ongoing to upgrade the site following the production of the Clitheroe Town Centre Masterplan study but these are developing slowly due to the impacts of the current recession.

4.7 There is scope to expand the market site once the current economic climate improves although it has been stressed that the long-term provision of the Market facilities should be retained as central to the future vitality of the town centre.

4.8 The following table details the size of store by individual floorspace. Again, as similar to the total number of units (table 1) across the three centres, the distribution of floorspace is comparable (i.e. Longridge is about half the size of Clitheroe and Whalley about half the size of Longridge).

Distribution of Outlets by Floorspace	Clitheroe	Longridge	Whalley
Under 1,000 square feet	105	54	30
Between 1,000 and 2,499 square feet	63	28	9
Between 2,500 and 4,999 square feet	16	7	3
Between 5,000 and 9,999 square feet	1	2	1
Between 10,000 and 14,999 square feet	1	1	0
Between 15,000 and 19,999 square feet	0	0	0
Between 20,000 and 29,999 square feet	3	1	0
30,000 square feet and above	0	0	0

Retail, leisure and office uses in edge and out-of-centre locations

4.9 This section provides an update of uses in 2013 in town centre and the edge of centre & out of centre locations. It is important to monitor this indicator in order to gauge how the changes occurring within a centre and in its periphery can affect the health of the centre itself.

4.10 To some extent, the amount of retail, leisure and office floorspace either on the edge or on out of centre locations can have an impact on town centres in general. This has been more prevalent in urban town centre locations in particular in recent years due to accessibility factors, which will be explained later in this study.

4.11 Most recent development in Clitheroe has appeared on edge of centre sites in recent years. For example, the Sainsbury's and Homebase outlets are located adjacent to the town centre retail core on the southern end of Moor Lane. As such these are not perceived as being detached from the town centre. Most recently has seen the development of the Lidl supermarket located on the old Stonebridge Mill site. As well as Clitheroe having a good spread in terms of diversity and mixture of uses, supermarket development in particular has added to the convenience and choice factors in the local area.

4.12 Most recent development in Longridge has appeared on the northern edge of the centre in recent years. The Sainsburys supermarket store (previously Somerfield) and plans are also in progress to expand the existing Booths Supermarket in the town centre. There are other sites potentially available for further expansion.

4.13 No significant developments have occurred in recent years in relation to Whalley. However, given the limited amount of outlets within the convenience categories in particular suggests that many people will shop for these in out of centre locations (i.e. Clitheroe and Accrington).

The potential capacity for growth or change

4.14 This section provides an update of uses in 2013 in town centre and the edge of centre & out of centre locations. It is important to monitor this indicator in order to gauge how the changes occurring within a centre and in its periphery can affect the health of the centre itself.

4.15 The ability of a town centre to grow in terms of regeneration, consolidation or expansion is imperative in maintaining the health and diversity of uses in a centre. The National Planning Policy Framework emphasises the need for local authorities to maintain a supply of suitable sites to cater for the needs of town centre expansion to 'allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres'.

4.16 It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Local planning authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable site.

4.17 The Market site in Clitheroe has been identified as a potential site for retail growth. No other sites have been identified. Most recent development in Longridge has appeared on the northern edge of the centre in recent years. The Sainsbury's supermarket store and whilst there is limited scope for expansion the Booths Supermarket site on Berry Lane plan to expand on site and have acquired land previously owned by Spar. No new retail developments have occurred in Whalley in recent years, however, land is available surrounding the centre of the village should expansion be required and subject to planning permission.

Retailer Representation

4.18 This section assesses the presence of national retail multiples in the town centre area. This gives a good indication of how the centre is performing in relation to attracting national retail outlets and it's current performance in the retail hierarchy. For the purposes of the health check process, national multiple retailers are defined as being part of a network of nine or more outlets, whose presence in a town centre is recognised as enhancing the retail attractiveness to local consumers.

4.19 The table on the following page lists the top retailers in the UK based on national town centre presence and shows that they are very poorly represented in the three town centres. Whalley has one (Lloyds Pharmacy), Longridge has two (Coop & Lloyds) and Clitheroe has three (Boots, WHSmith and Lloyds Pharmacy plus the Tesco and Sainsbury stores). For its size, Clitheroe could potentially accommodate more.

4.20 There are a number of national multiple retailers in Clitheroe, and a high proportion of these are in the financial sector, banks and building societies. What is evident is lack of high street retail traders. Boots and WHSmith are present, but the only other comparison store is Mackays (M&Co), which specialises in adult and children's clothing. The Factory Shop, for example, which is located on an edge of centre site across the road from Lidl, sells a range of clothing, shoes and household goods.

4.21 The number of major multiple retailers within any of the centres has remained relatively unchanged in recent years. By this measure also, Clitheroe ranks highest in Ribble Valley's retail hierarchy based on major national retail representation, 4.22 The fact that Clitheroe also has a reasonable range of independent traders adds to the shopping offer and countering the so-called ‘clone town’ effect. The independents are also quite evenly distributed throughout the town’s main shopping streets mainly as well as the additional Market days of local independent traders, of which all units are currently let. Longridge and Whalley are mostly independents however the Booths Supermarket chain in Longridge is considered a significant regional company.

4.23 It is likely that neither Longridge nor Whalley are large enough to support any other national retailer brands. Large retailers have enough market influence to be able to have a store in a small town should they wish to. Usually, the reason they are not present is either because there are no suitable retail premises (modern, with a large floorplate) available or it is not economically viable to do so because the retail catchment population would not support a store. A report by the New Economics

Type	**Retailer**	**Clitheroe**	**Longridge**	**Whalley**
Department Stores: -	BHS			
	Debenhams			
	House of Fraser			
	John Lewis			
	Marks & Spencer			
Mixed Goods Retailers: -	Argos			
	Boots the Chemist	Yes		
	T K Maxx			
	W H Smith	Yes		
	Wilkinson			
Clothing: -	Burton			
	Dorothy Perkins			
	H & M			
	New Look			
	Next			
	Primark			
	River Island			
	Topman			
	Topshop			
Other Retailers: -	Carphone Warehouse			
	Clarks			
	H M V			
	O2			
	Lloyds Pharmacy	Yes	Yes	Yes
	Superdrug			
	Phones 4 U			
	Vodafone			
	Waterstones			
Supermarkets	Sainsbury	Yes		
	Tesco	Yes		
	Coop		Yes	
	Waitrose			

Foundation in 2005, "Clone Town Britain", found that 42 percent of towns in Britain are considered to be clone towns – a place where the individuality of the high street is replaced by a homogenous, non-place specific array of national brands. Conversely, 33 percent are home towns – a town with a high street, which is recognisable and distinctive. The remaining 26 percent were home towns under threat.

4.24 Recognised retail brands can be a significant attraction and can influence market shares captured by towns to make them more viable. This is of course, influenced by a wide variety of factors – accessibility, perception of crime and environmental quality that together create a retail experience. However some centres are recognising that independent shops offer more individual character and attractiveness helping them to remain as successful centres on their own.

Shop rents

4.25 Rental levels are affected by numerous factors including economic factors, turnover performance and floorspace supply. Across all three centres recent monitoring of vacant marketed property shows that rents are comparable with those in other town centre locations outside Ribble Valley, and whilst some larger locations (i.e. Blackburn and Burnley) may boast a larger number of multiple or national retailers and footfall only a small number of properties have remained vacant for some time. Also Whalley currently has consistently low vacant retail property rates as reported earlier. Retail rents are therefore considered comparable with, and in some cases favourable to, other centres of similar size and characteristics. On average rental levels compare very favourably with rentals in competing centres in the region.

Proportion of vacant street level property

4.26 The proportion of vacant street level property and length of time vacant in a town centre is the most demonstrative indicator of reflecting the current health and performance of a town centre along with measuring the length of time premises have remained vacant. In recent years there has been an increase in the number of vacant units. However, long-term vacancies remain low.

4.27 The proportion of vacant street level properties across all three centres is comfortably below the national average. There are 2 vacant premises in Whalley. The vacancy rate in Clitheroe and Longridge is 5-6 percent by premises (national average is approximately 14 percent), and 3-5 percent by floorspace (national average is approximately 10 percent). Compared to other rural centres this appears to be a healthy figure and whilst in relation to the 3 centres in Ribble Valley, whilst vacant units do exist, most of these relate to what is described as ‘churn’ – whereas no evidence suggest that the same retail units staying vacant. Neither are there signs of change to lower value retail.

4.28 A significant proportion of retailers in Clitheroe own their premises (around a third), this increases to around a half in Longridge and Whalley. Overall, this suggests that due to the local nature of the retail property market in Clitheroe, Longridge and Whalley (i.e. largely local, independent retailers with some freehold premises) the town centre is more immune to national changes in rents and yields i.e. the low representation of national brands protects local retail rents to changes in the national economy. However, the benefits of this need to be weighed against the lack of trade associated with poor national retailer representation.

4.29 Historically, we are still experiencing low interest rates. Should this change, local retailers are likely to suffer more acutely than large chains and national brands and the viability of the town centre threatened. A balance between national and independent retailer representation needs to be struck.

4.30 Based on property enquiries made to the Council, in Longridge demand for shop premises is slightly lower than the other two centres, which can also be reflected in its slightly lower rents. Convenience stores, professional and financial services are most important to the town centre in terms of attracting shoppers. The town centre is also spread out along Berry Lane, which reduces mobility, particularly up the steep hill, and results in the town centre lacking a retail core. A previous household survey showed that shoppers on the whole, are attracted to the town centre out of necessity, rather than for leisure.

4.31 Clitheroe, by far accommodates the largest goods-based retail economy in the Ribble Valley. However, retailers report a fall in shopper numbers in recent years, which could be compounded as nationally in recent years, consumer spending has been curbed by the recession.

4.32 For their size, all 3 centres whilst benefiting from some proportion of retail spend from the catchment will by nature and location continue to be overshadowed by the larger retail economies of Preston, Blackburn, Burnley, Accrington and Nelson.

4.33 Whilst the retail economy appears to be dominated by spend on convenience goods in nearby supermarkets. More people appear to be visiting the town centre out of necessity rather than for leisure. In previous surveys, main concerns have been the poor variety of shops and lack of national retailer representation, which fail to draw more shoppers to the town.

4.34 Regarding retail, previously there has been some concern that an increasing number of Clitheroe town centre retailers are moving to edge-of-town and out-of-town business park and industrial estate locations to continue their trade. Such locations are felt to offer better accessibility and cheaper rents. This could potentially be a sign of weakening retail trade and ‘hollowing out’ of Clitheroe town centre.

Pedestrian flows

4.35 Pedestrian flows are a useful indicator of movement density within town centres, affording relevant information for determining or reviewing primary and secondary frontages and identifying changes in pedestrian accessibility.

4.36 Although specific pedestrian flow counts have not been recorded for any of the three centres, however, the monitoring of all 3 locations reveals that naturally footfall is heaviest to and from public transport and car parking locations. Higher pedestrian flows in each of the centres are visible as follows: Clitheroe: Castle Street between Moor Lane and King Street, Longridge: Berry Lane generally and Whalley: King Street generally. Naturally, these represent the primary shopping frontages in all three centres and it is generally secondary locations within the centres where vacancy rates appear to be more frequent reflecting lower footfall counts.

Accessibility

4.37 When considering the ease and convenience of travel, by different means, to and within the town centres, it is notable that the nature of Clitheroe and Whalley results in some through traffic being directed through the centre and can lead to a sense that the car is dominant, footpaths are narrow in all 3 locations, however, they are all essentially walkable with the centre the natural focus for residents. Information is also drawn from previous surveys and discussions.

4.38 Firstly in Clitheroe, access to the Town Centre for cars is reasonably good, with the main road network facilitating access from all directions. However, traffic congestion can sometimes be a problem, in particular at peak hours and on Saturdays. Car parks are relatively convenient and well distributed around the Town Centre. Town centre bus stops are located at the train station.

4.39 Some of the other town centre car parks are owned and operated by retailers such as Booths, Sainsbury's and Tesco, and whilst these are intended for store customers' use, offer 2 hours free parking where there is evidence of people using these facilities to make additional/combined trips to other shops. Some people can also make trips on foot from more peripheral car parks on the edge of centre. There is a 'shopmobility' scheme in place to assist disabled people in the Town Centre, based on Lowergate.

4.40 Car parking is identified by businesses as a priority issue which should be addressed in the town centre by making it more accessible and better priced for both staff and customers (e.g cheaper or free parking). Residential areas are within easy walking distance of the town centre. However, some busy roads around the town centre and roundabout junctions on the approach from many directions may discourage some pedestrians and cyclists making trips to the centre.

4.41 The Clitheroe Interchange was developed in year 2000 to significantly improve usability of public transport within the town. The facility is located next to the railway station and there is a nearby taxi rank creating a public transport hub. In terms of rail access, Clitheroe Interchange provides a number of services to the wider area. There is also a direct local service to Manchester from here. The town centre therefore has fairly good rail links to the strategic network but local services are insufficiently frequent, limiting the opportunity to generate increases to business and shopping trips by rail.

4.42 Bus provision is well served Monday to Saturday with routes radiating from the Town Centre and many routes operating at 10-15 minute frequencies. Some services operate during the evenings, although less frequently, whilst Sunday services are more limited with no services on Sunday evenings, but is better than in many rural towns of similar size. In addition there are bus services to neighbouring towns including routes to Accrington, Blackburn and Burnley. Bus stops are also located around the periphery of the Town Centre facilitating good access to the Town Centre.

4.43 Longridge town centre is easy to access, however the centre is on a slope, which could be potentially challenging for some disabled or elderly users or those with young children. Street traffic does not appear to impede pedestrians from crossing the road with a pedestrian crossing located in the middle of Berry Lane. There are no defined pedestrian covered areas in the centre and pavements seem adequately maintained, unobstructed and pedestrians are able to move about freely. There was a steady flow and presence of pedestrians at the time of survey. There is restricted on street parking.

4.44 E H Booth & Co operates a large supermaket premises on Berry Lane. In 2011 they acquired a lease from David Bridge & Co., the Spar retailer of the property which adjoins their Longridge store. Booths are going to join the existing store to one of the two buildings on the new site enabling them to increase the size of their store in Longridge to 12,750 sq ft. The other building will be let to a complimentary retailer.

4.45 The existing filling station will remain and the acquisition of the new site, which includes a car park, will enabling car parking to be increased to 150 spaces. Booths hope to start work in the near future and the existing store will continue to trade throughout. Robert Pinkus & Co. acted on behalf of Booths on the acquisition of the new site. There is also a good bus route to Preston and is within 20 mins drive to the M6 motorway.

4.46 In Whalley, access to the Town Centre for cars is reasonably good, with the main road network facilitating access from all directions. However, traffic congestion can sometimes be a problem, in particular at peak hours and on Saturdays. Car parking is identified by businesses as a major issue in Whalley that needs to be addressed in the centre by making it more accessible and better priced for both staff and customers (e.g cheaper or free parking). There is unrestricted on street car parking but this can easily become fully occupied early in the day making shoppers use the privately operated pay and display car park. The provision of more and cheaper parking and a wider variety of shops could help towards improving the town centre. A suitable site for additional parking or shops could be located at the bus station site.

Safety and Crime

4.47 In relation to safety and crime in the borough, Ribble Valley has relatively low levels of recorded crime. Town centres are usually high on the list of reported incidents in any Local Authority area. In the past, surveys found generally good perceptions of personal safety amongst residents and visitors.

Environmental Quality

4.48 All three centres contain a variety of traditional buildings, with some quality frontages and attractive historic buildings. Generally, the street conditions across all three centres seem to be reasonably well maintained and no significant problems appear with regards to the general environment quality within the centres. In general, the standard of cleanliness is high also, with very little evidence of litter, fly-posting or graffiti helping to provide a pleasant environment for shoppers and visitors and enhancing the townscape quality of the centre, however, some traffic movements can diminish the visitor experience. Whilst specific areas can be detected where some improvements could be made to walkways, on the whole the environmental quality of all three centres is generally good.

5.0 SUMMARY & CONCLUSIONS

Clitheroe

5.1 Clitheroe by far accommodates the largest retail economy in the Ribble Valley. Although some empty properties exist the 'churn' means many are not vacant for considerable amounts of time and rents and demand for shop units remain relatively high. Any retailers witnessing a fall in shopper numbers and a decline in trade is being compounded as nationally consumer spending is curbed by the economic downturn as well a the competing retail economies of nearby Blackburn, Burnley, Accrington and Nelson. Despite a relative lack of national retailer representation. Demand is high for retail units from local, independent retailers and a significant proportion of retailers own their shop premises. Most recently has seen the development of the Lidl supermarket located on the old Stonebridge Mill site. As well as Clitheroe having a good spread in terms of diversity and mixture of uses, new store development in particular (Homebase & Lidl) has added to the convenience and choice factors in the local area.

Longridge

5.2 Longridge also appears to be doing well, although perhaps not as well as it could be. It has the lowest rents of the three towns, despite being the second largest (as such, reflecting lower demand for shop premises). At almost 13 times the size of Whalley's economy, it is an important service centre particularly for professional and financial services (in terms of the proportion of floorspace dedicated to this use) and business confidence is high. The convenience goods market is also important to the town centre in terms of turnover generated and attracting shoppers. Factors impacting upon the town's vitality include the perception that there is a lack of affordable parking (although there does seem to be adequate parking available) and environmental quality, which could be affecting retail trade. The town centre is also spread out by the linear nature of Berry Lane, which reduces mobility, particularly up the steep hill, and results in the town centre lacking a retail core (although it is clear that trade is focused towards the bottom end of Berry Lane).

Whalley

5.3 Whalley performs the best of the three town centres in terms of vitality and viability but is comparably smaller in size to Clitheroe and Longridge. It has a consistently low vacant shop rate, retailer confidence is high, footfall and trade seem to have been constant in recent years, if not increasing. However, Whalley has a low market share of retail in convenience goods categories. Retailers report that shoppers from across all parts of the Borough visit the town centre (albeit mostly by car) and rate it the best town centre in terms of being able to walk around. However, availability of affordable parking and traffic congestion are key concerns. The town centre has an emerging pub and restaurant scene, which is developing a thriving evening economy. One emerging concern is the lack of convenience retailers (many have changed to other retail uses) which means local residents need to travel further for necessity items. This may undermine the town's long term sustainability (for example, due to rising interest rates), should comparison spending drop unexpectedly.

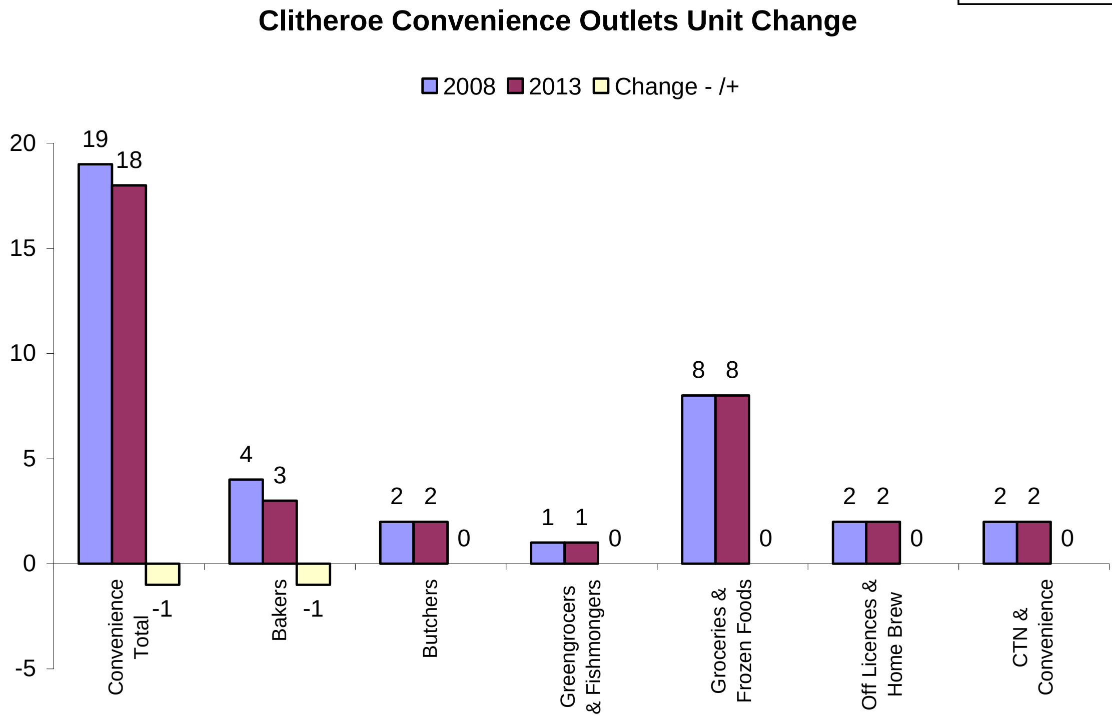
Conclusion

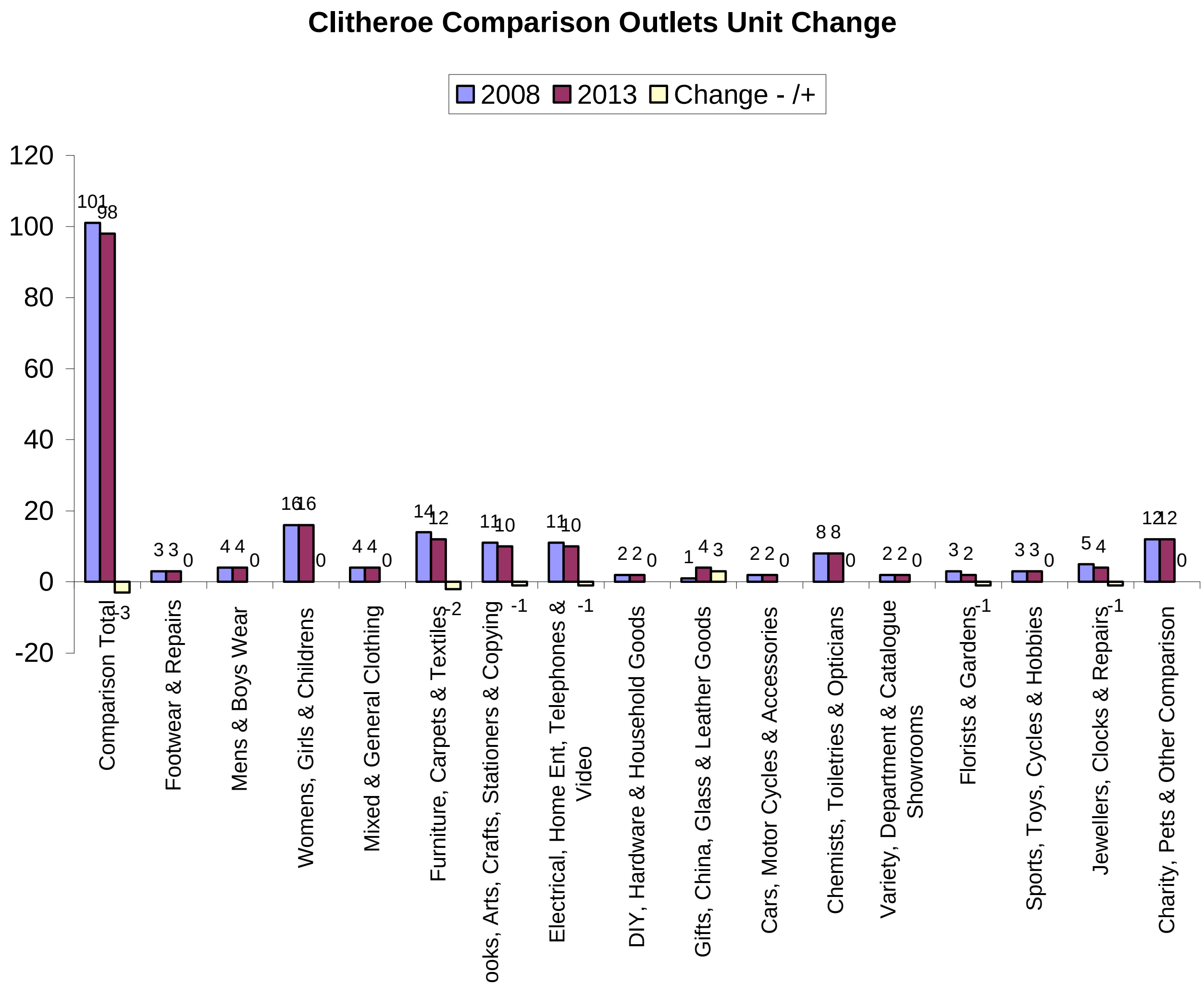
5.4 These Service Centre Health Check assessments draw some positive conclusions in such that the vitality and viability of all three centres - Clitheroe, Longridge and Whalley appear to be continuing in their own individual roles and function in the wider Borough in terms of healthy functioning centres. It is recognised that they all play an important role in serving the requirements of the local community on a day-to-day basis.

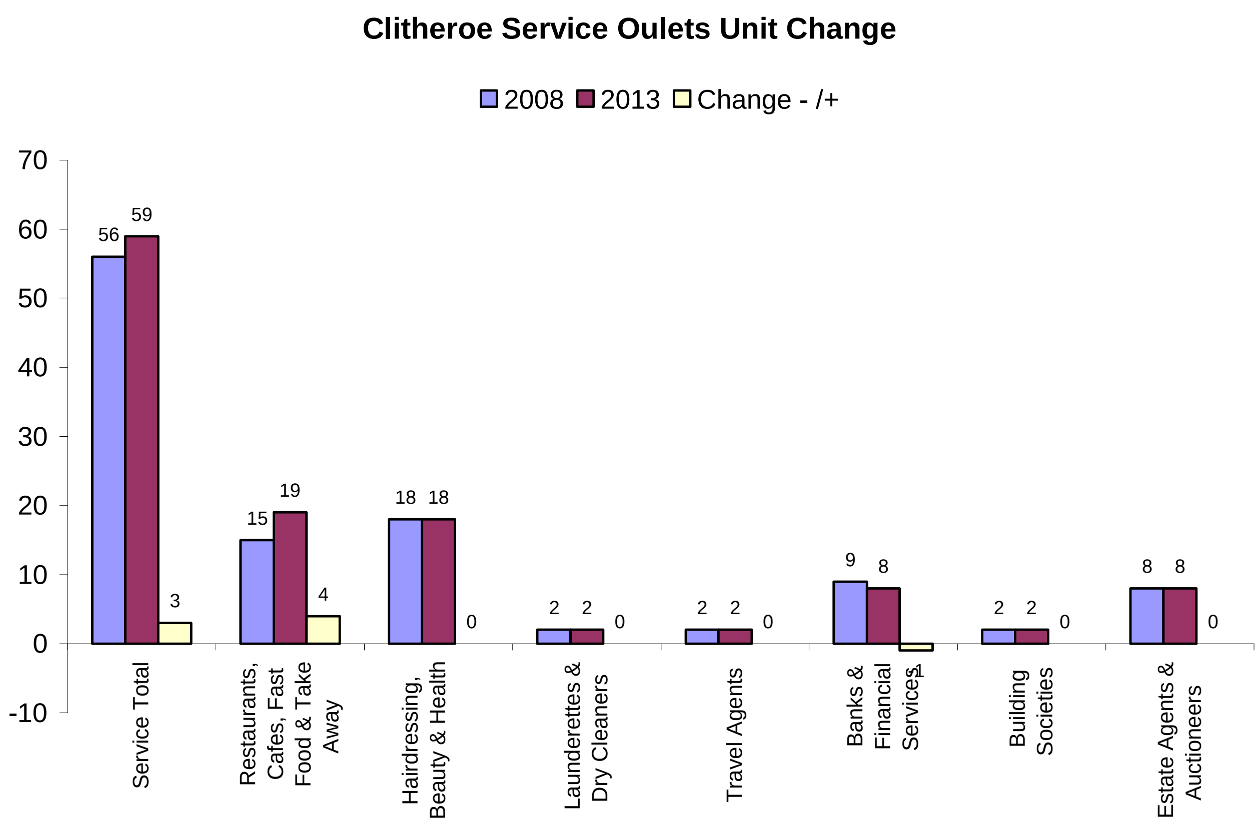
5.5 Whilst continuing and more detailed analysis may be required in some areas, this is encouraging that they continue to form a focal point for the surrounding area and provide a wide range of services that are accessible to the population, and contribute towards the aims of sustainable development.

Clitheroe: Retail Outlet 5-Year Change Comparison (2008 / 2013): -

APPENDIX A






Clitheroe Service Oulets Unit Change
2008
2013
Change - /+
Service Total
Restaurants, Cafes, Fast Food & Take Away
Hairdressing, Beauty & Health
Launderettes & Dry Cleaners
Travel Agents
Banks & Financial Services
Building Societies
Estate Agents & Auctioneers
56
59
3
15
19
4
18
18
0
2
2
0
2
2
0
9
8
-1
2
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0
8
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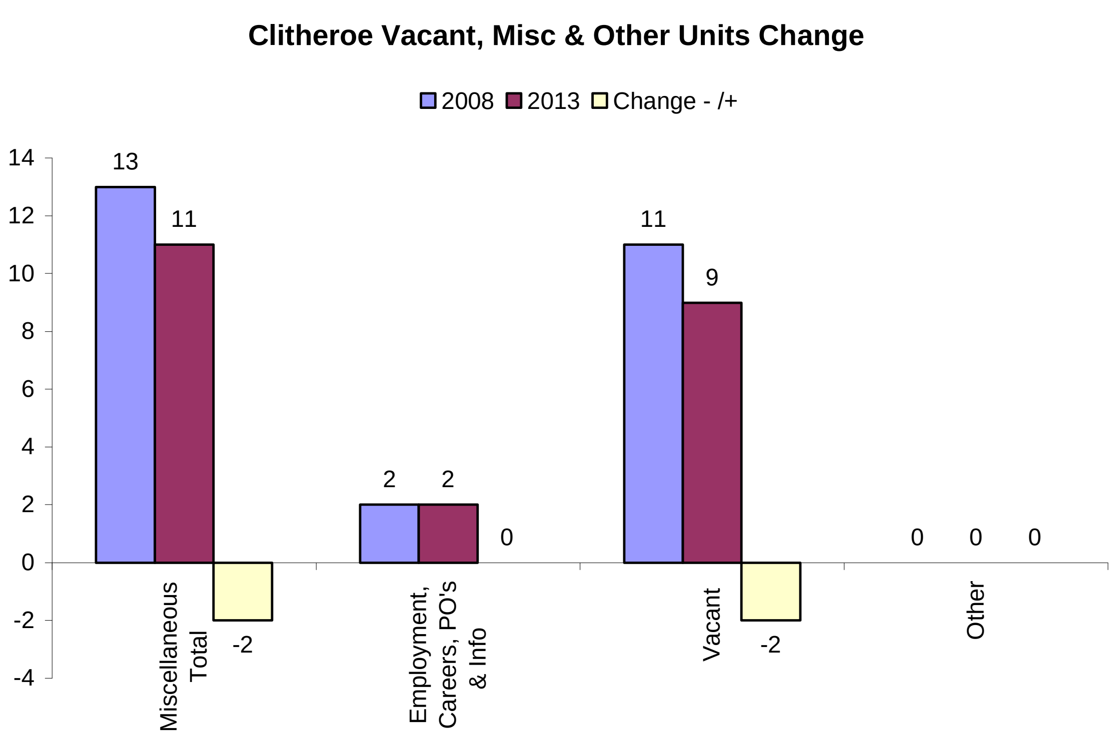
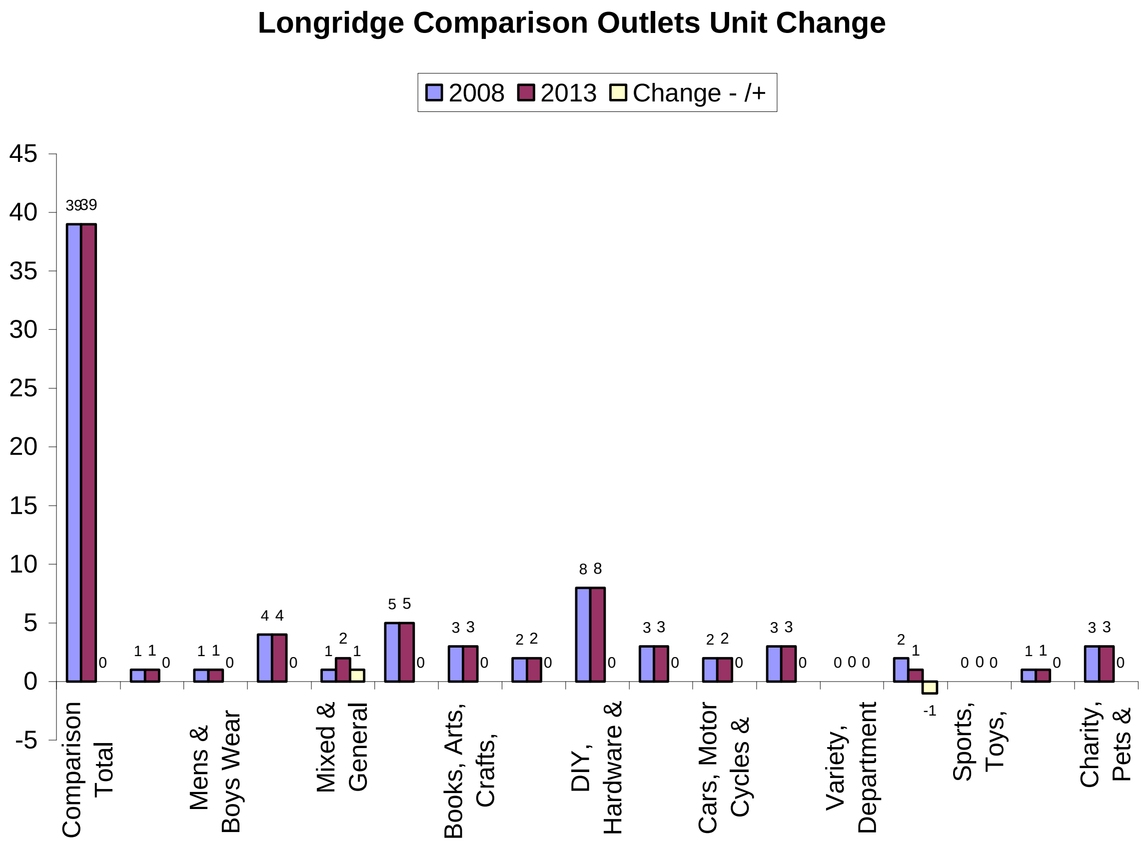
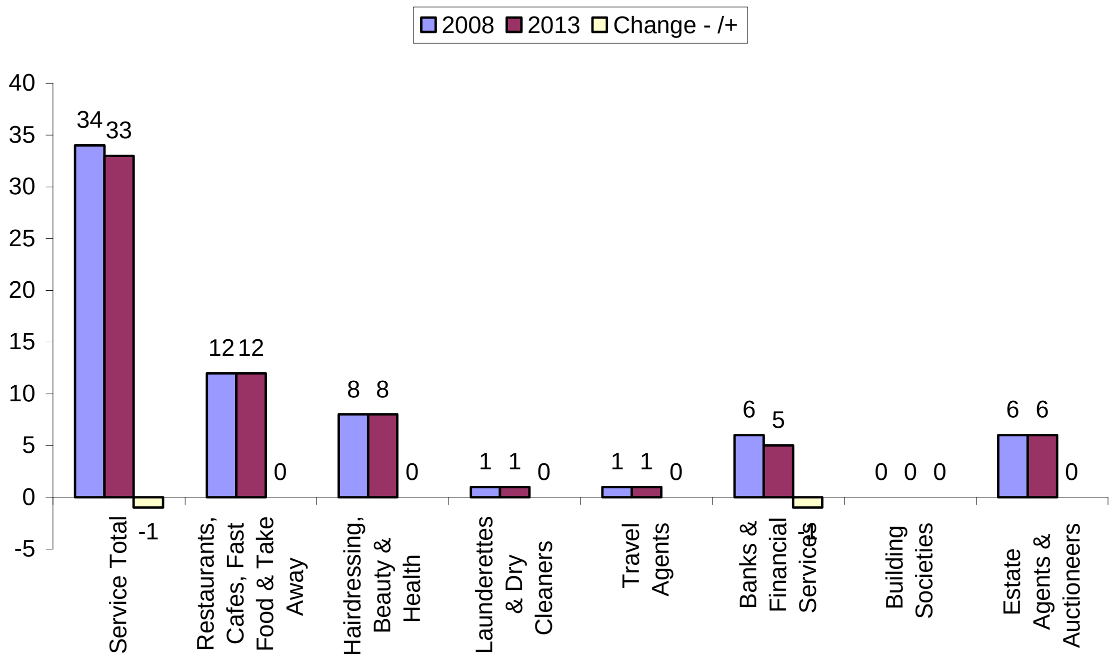

Clitheroe Vacant, Misc & Other Units Change
2008
2013
Change - /+
Miscellaneous Total
Employment, Careers, PO's & Info
Vacant
Other
13
11
-2
2
2
0
11
9
-2
0
0
0

Longridge: Retail Outlet 5-Year Change Comparison (2008 / 2013): -

APPENDIX B

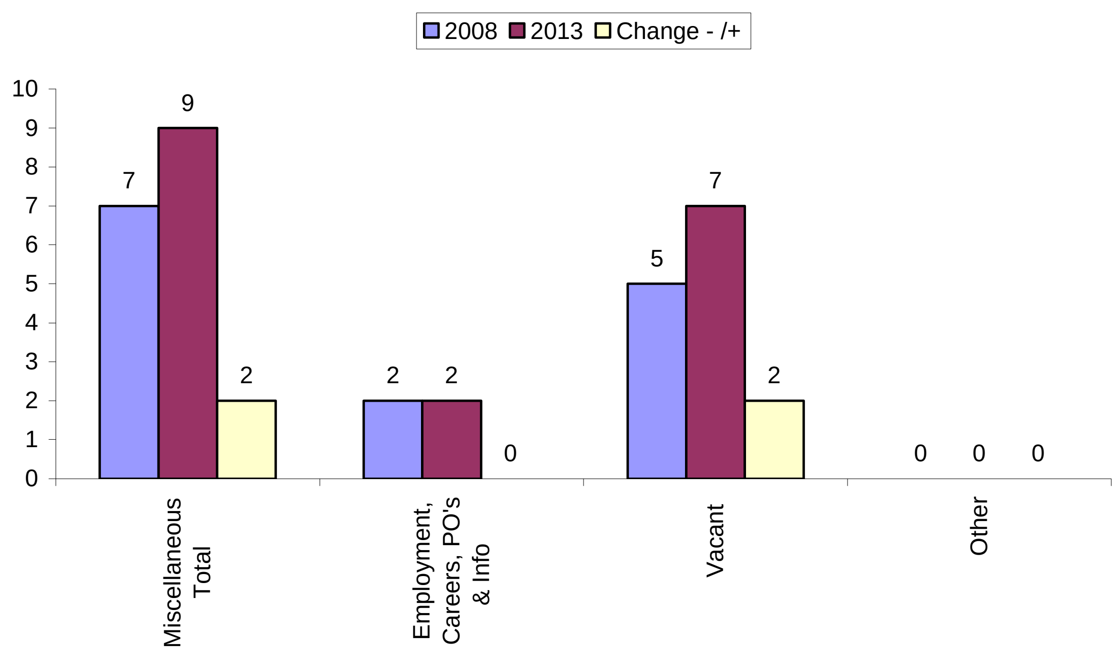


Longridge Service Outlets Unit Change

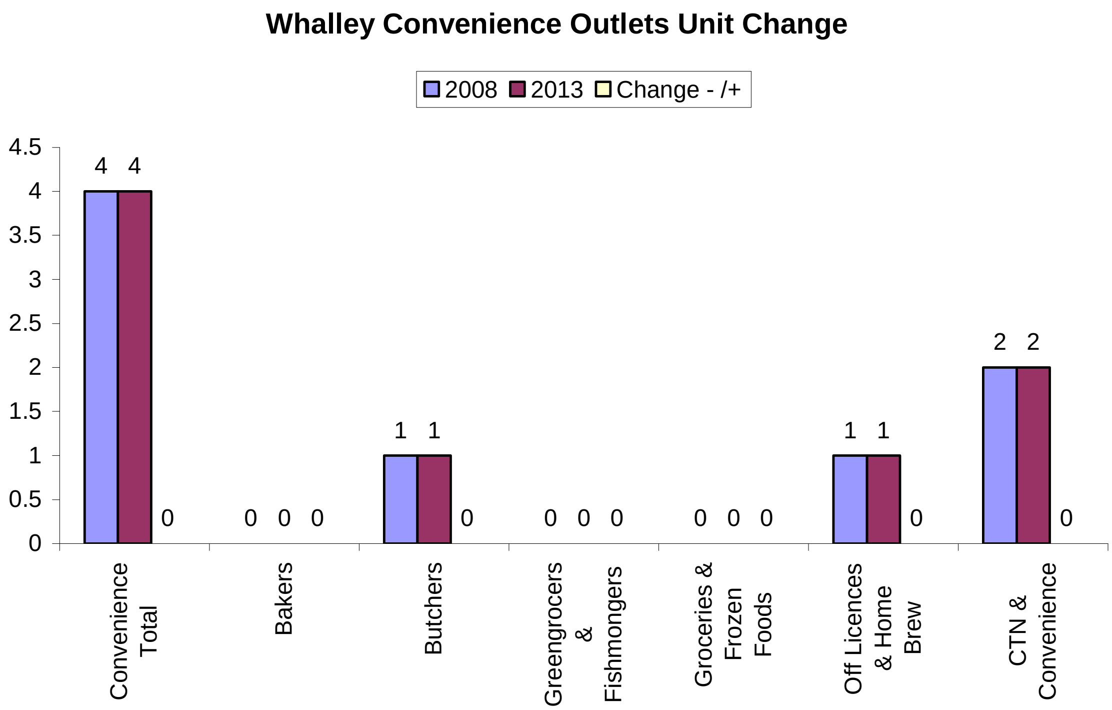


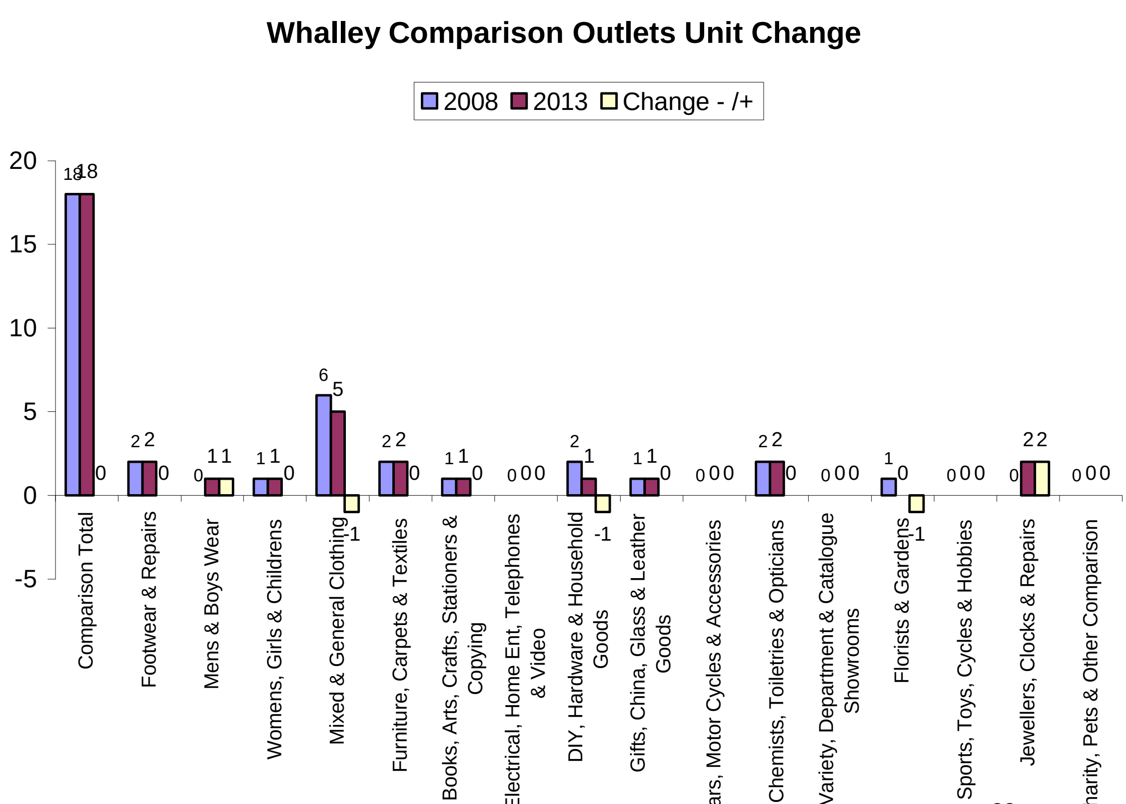
APPENDIX C

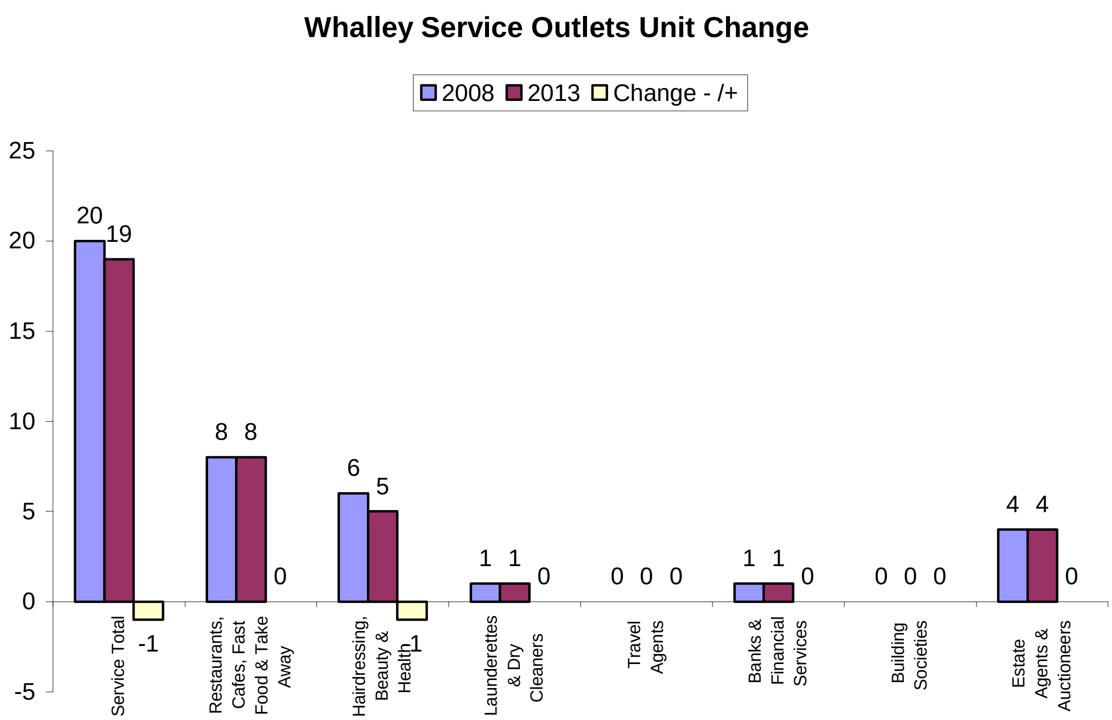
Longridge Vacant, Misc & Other Units Change

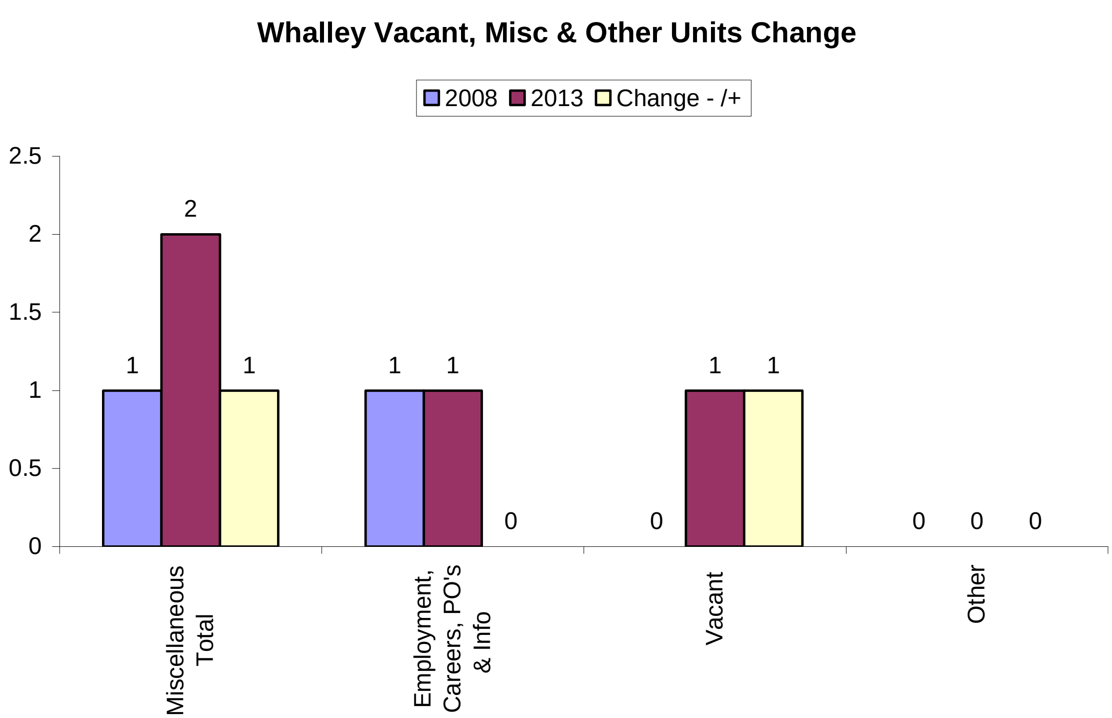


Whalley: Retail Outlet 5-Year Change Comparison (2008 / 2013): -






Whalley Service Outlets Unit Change
2008
2013
Change - /+
Service Total
Restaurants, Cafes, Fast Food & Take Away
Hairdressing, Beauty & Health
Launderettes & Dry Cleaners
Travel Agents
Banks & Financial Services
Building Societies
Estate Agents & Auctioneers


Whalley Vacant, Misc & Other Units Change
2008
2013
Change - /+
Miscellaneous Total
Employment, Careers, PO's & Info
Vacant
Other