Rossendale Town Centre, Retail, Leisure and Tourism Study

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Rossendale Borough Council

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1.0 Introduction

Purpose of the Study

1.1 In November 2016 WYG Planning (hereafter referred to as 'WYG') was commissioned by Rossendale Borough Council ('the Council') to undertake a Town Centre, Retail, Leisure and Tourism Study (hereafter referred to as 'the TCRLTS') for Rossendale Borough. The Study acts to update and effectively supersede the previous Rossendale Retail and Town Centre Study Update which reported in September 2009.

1.2 A key purpose of this Study is to provide an assessment of retail, leisure and tourism needs and capacity in the period to 2034, and to review the current performance of Rawtenstall town centre, Bacup and Haslingden district centres, and six further local and neighbourhood centres across the Borough. The Study will act as the evidence base to assist in the formulation of the emerging Local Plan (2019 to 2034), as well as providing baseline information to assist in the determination of planning applications for retail and leisure development.

1.3 The Study draws upon new empirical research, with NEMS Market Research Limited (NEMS) undertaking surveys of 400 households within a defined Study Area in February and November 2016. The Study Area for the household survey comprises four zones which are based on postcode sectors grouped to reflect areas which are likely to exhibit similar patterns of shopping behaviour. The Study also draws upon the most recent Experian population and expenditure base data (published December 2016) in order to establish the up-to-date position regarding both convenience and comparison goods capacity.

1.4 In accordance with the Borough Council's study brief, the TCRLTS includes:

- a summary of national and local town centre policy and its interpretation, including a commentary on the degree to which the Core Strategy's retail policies remain compliant with those at a national level;
- a review of national trends in retailing and their implications for Rossendale;
- health check assessments of the Borough's town, district and local centres in order to understand their current vitality and viability;

- an overview of existing shopping patterns within the defined study area based upon up-to-date survey data. This exercise includes a comparison of current market shares for Rossendale's defined centres and other shopping destinations with those identified as part of the Borough's 2009 Study;
- a quantitative assessment of retail floorspace requirements in both the convenience and comparison goods sectors up to 2034, taking into account the latest population and expenditure base data and growth assumptions;
- a qualitative assessment of retail needs having regard to the performance of existing centres and stand-alone shopping destinations, as well as any identified requirements to increase consumer choice in parts of the Borough which may be underserved by retail provision;
- a qualitative examination of the need for additional leisure and tourist development based on an analysis of the Borough's existing offer, consideration of consumer trends established through survey data, and liaison with relevant stakeholders; and,
- overall recommendations in respect of how to meet the identified floorspace requirements, including the identification of sites capable of accommodating future retail and leisure development. Consideration will also be given to whether centre boundaries remain appropriate having regard to our up-to-date health check work.

Structure of the Report

1.5 In view of the scope of works, our report is structured as follows:

- Section 2 provides a context for the Retail Study by providing an analysis of key retail trends;
- Section 3 considers the up-to-date position in respect of relevant national retail and town centre planning policy;
- Section 4 sets out a review of the survey research and considers changes in shopping behaviour that have occurred since the undertaking of the previous Study;
- Section 5 sets out an overview of the vitality and viability of the Borough's town, district, local and neighbourhood centres;
- Section 6 identifies current and future population and expenditure levels within the Study Area;

- Section 7 provides our assessment of the quantitative and qualitative need for further convenience and comparison goods retail floorspace over the assessment period;
- Section 8 considers the need for additional leisure development;
- Section 9 examines the quantitative and qualitative requirements for additional development to support the Borough's tourism sector; and,
- Section 10 sets out our recommendations in respect of Rossendale's future retail and town centre policies and plan designations.

2.0 Current and Emerging Retail Trends

Introduction

2.1 The retail property landscape across the UK has evolved significantly over the past 50 years, from post-war redevelopment in town centres, through to the emergence of retail warehouse parks and out-of-town regional shopping malls. For most of this period, the retail sector has experienced considerable expenditure growth, which has been attributed to a number of factors, including greater disposable income, availability of credit, new technology and a general overall increase in our standard of living. However, recent economic conditions have had a clear impact on expenditure and per capita convenience goods spending has actually reduced in recent years. The way in which goods are purchased has also altered due to the increased popularity of 'e-tailing', which now claims more than one in every ten pounds spent in the UK.

2.2 In order to set out the wider context for the Study, we provide an overview of prevailing retail and leisure trends below.

Polarisation and the Decline of Secondary Centres

2.3 In recent years, shoppers have been increasingly prepared to travel in order to access a greater choice of shops and the type of leisure facilities which are more commonly available in larger towns and cities. As a consequence, larger retail venues (with a regional or sub-regional role) have tended to perform relatively strongly, but a number of smaller towns (particularly those proximate to larger centres) have fared less well. The performance of many smaller towns has also been particularly impacted upon by the recession and the growth of internet shopping, which has resulted in many operators believing that they can achieve appropriate nationwide coverage with a smaller number of stores. The same can also be said in the financial services sector, with the rise of online account management resulting in a reduction in the branch portfolio of all the UK's major banks and building societies.

2.4 Colliers[1] reports that many retailers are focused on a much smaller portfolio of stores to cover main markets and to complement online sales. As such, Colliers indicates that new and emerging retailers frequently target no more than 50 stores in key locations and, as a consequence, this trend is having an impact on take-up levels in shopping centres.

2.5 It is also evident that certain operators – including the Arcadia Group, through its Outfit format which incorporates Topshop, Topman, Miss Selfridge and others – are sometimes prepared to close stores in smaller centres in favour of representation on a retail park. We also note the increasing preference of fast food operators to incorporate 'drive thru' restaurants, which has resulted in the closure of 'in centre' McDonald's restaurants in some centres. Furthermore, in November 2016, Marks & Spencer announced its intention to close up to 30 stores and relocate or downsize several others. The changes will result in clothing being sold in a lesser number of Marks & Spencer stores.

2.6 Such changes can result in particularly significant impacts at smaller town centres, which have tended to be the subject of higher vacancy rates, and which have also often suffered related reductions in rental levels and footfall in recent years. As a consequence, a greater proportion of comparison goods expenditure is being claimed by a smaller number of centres of sub-regional or regional importance.

2.7 However, such changes have also brought forward opportunities for different types of retailer. Some available units in smaller centres have been re-occupied by household discounters such as B&M Bargains, Poundland, Poundstretcher and Wilko. Whilst such lettings are valuable in bringing back premises into active use, many smaller centres are heavily reliant on such retailers, which are generally operate at the lower end of the market.

2.8 It is also evident that some centres are seeking to 'reinvent' themselves through an increased focus on quality independent and food and drink operators. Towns are also increasingly valuing their market as a means to differentiate themselves from retail parks and superstores, and many markets are looking to contemporary and speciality retailers to create interest and draw customers in. The greatest opportunities for successful vintage, craft and food and drink markets have so far been in centres served by affluent catchments.

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

2.9 Shoppers have turned away from food superstores in recent year and Mintel[2] suggests that this decline is such that it cannot be considered a 'blip'. Mintel attributes the problems which face superstores to two principal factors.

[2] 'UK Retail Rankings', Mintel, April 2016

2.10 Firstly, many young people are choosing to rent within or close to town and city centres. As a consequence, many undertake sporadic food shopping and often eat out, use takeaways, or buy instant meals. Accordingly, when young people undertake food shopping, they often have no greater need than that which can be serviced by a convenience store.

2.11 The second factor is the growth of discount operators, which have become more mainstream in both their offer and market positioning. Mintel suggests that the improvements in discounters' offer – such as wider ranges, better fresh foods and more premium foods – means that they have become an attractive alternative to both large food superstores and to convenience stores.

2.12 As a consequence, the 'big four' foodstore operators (Asda, Morrisons, Sainsbury's and Tesco) have become circumspect in respect of new store openings and, indeed, have closed a number of existing stores. All four have suffered significant declines in their market share over the past four or five years. As Table 2.1 below indicates, Tesco has suffered a 2.1 percentage point reduction in its share of the food retail market between 2011 and 2016, and Morrisons has suffered a 1.8 percentage point reduction in market share. Considered together, the market share of the big four foodstore operators has declined from 58.5% in 2011 to 52.7% in 2016 (a reduction of 5.8 percentage points). In contrast, other retailers – most notably Aldi and Lidl – have benefitted from increases in their market share. Aldi's market share increased from 1.9% to 5.3% (equating to an increase of 3.4 percentage points) between 2011 and 2016.

Table 2.1: Market Share of Key UK Food Retailers

Operator	2011	2012	2013	2014	2015	2016
Tesco	23.7%	23.9%	23.0%	22.5%	22.0%	21.6%
Sainsbury's	12.8%	13.1%	12.9%	12.8%	12.2%	11.9%
Asda	12.5%	13.3%	13.0%	13.0%	12.0%	11.5%
Morrisons	9.5%	9.3%	8.9%	8.2%	7.9%	7.7%
Aldi	1.9%	2.6%	3.3%	4.2%	4.8%	5.3%
Co-operative Food	5.5%	5.4%	5.1%	4.9%	4.8%	4.7%
Waitrose	3.5%	3.6%	3.7%	3.9%	3.9%	3.9%
Marks & Spencer	3.6%	3.7%	3.7%	3.8%	3.9%	3.9%
Lidl	1.9%	2.0%	2.0%	2.2%	2.4%	2.7%
Iceland	1.8%	1.9%	1.9%	1.9%	1.8%	1.8%

Source: UK Food & Grocery Retailer Update, Verdict, October 2016

2.13 The most notable expansion strategy pursued by any of the big four operators in recent years relates to Sainsbury's decision to enter the discount market through a partnership with Netto. Netto announced the trialling of 15 stores in November 2014 clustered around the M62 corridor between Liverpool and Hull in order to 'test the water'. The first two new build openings were announced in March 2015 in Lymm and Hull, which appeared to suggest confidence in the venture. However, following the trial, Netto announced in July 2016 that it would close all its UK stores by August 2016.

2.14 For the most part, the current strategy of the big four operators involves the reconfiguration and refurbishment of existing stores. In some cases, product lines are being reduced and pricing is being made straightforward. Some operators are looking to introduce other uses to take existing floorspace and Sainsbury's acquisition of the Home Retail Group in September 2016 allows it to introduce Argos (which it now owns) into its stores. Small concessions of Habitat are also currently being tested within five branches of Sainsbury's.

2.15 Aldi and Lidl have both sought to take advantage of the structural changes in the food retail market and have announced ambitious store opening targets that will further increase pressure on the big four operators. Aldi has identified major expansion plans and intends to open 70 new UK stores in 2017[3], bringing its total number of stores to around 800. Over the longer term, it intends to trade from 1,000 UK stores by 2022[4]. Aldi's plans include three formats: standard stores of between 18,000 sq.ft and 20,000 sq.ft with a minimum of 70 parking spaces; the 'Small Aldi' format of between 10,000 sq.ft and 14,000 sq.ft with a minimum of 40 parking spaces; and, the 'City Aldi' format of between 7,000 sq.ft to 10,000 sq.ft with no parking spaces required. Aldi is understood to be considering all types of property, including development sites, mixed-use schemes, retail parks, high streets, shopping centres and roadside.

2.16 Lidl plans to expand to trade from a portfolio of 1,200 UK stores in the coming years[5]. Lidl's future requirements reportedly[6] comprise units of between 20,000 sq.ft and 30,000 sq.ft, with sites of 1.5 acres required for standalone units and up to 4 acres for mixed-use schemes.

[3] Source: Verdict Daily Retail Roundup, 6 January 2017
[4] Article headlined 'Supermarkets: discounters race for space', Property Week, 2 November 2016
[5] 'UK Food & Grocery Retailer Update', Verdict, October 2016

Special Forms of Trading

2.17 Many consumers who previously shopped in town centres and at retail parks are now increasingly using the internet to make purchases. Experian[7] identifies that 'special forms of trading' (which includes internet, mail order and market sales) now comprises an estimated 15.7% of total UK retail sales at 2017, which compares to a market share of just 5.8% at 2007. Experian estimates that the value of non-store sales in the UK at 2017 is £60.3 billion. It estimates that special forms of trading will increase further to 18.6% of retail expenditure over the five years to 2022 (2.9% increase). Thereafter, it is anticipated that additional growth will be relatively limited, with special forms of trading claiming 20.9% of UK retail expenditure at 2035 (the last reporting year for which Experian provides a figure). This equates to projected growth of just 2.3% over the 13-year period between 2022 and 2035.

2.18 The growth in internet as a sales medium has been enabled by the increase in access to the internet by UK households, which the Office for National Statistics[8] reports increased from 57% of households at 2006 to 89% in 2016. The proportion of households with access to the internet is expected to increase further over the coming years and the popularity of shopping online is also assisted by mobile phones and tablets with faster 4G network technology. The Office for National Statistics indicates that the proportion of adults accessing the internet using a mobile phone increased by nearly double – from 36% to 66% – between 2011 and 2015.

2.19 It is evident that improvements in technology and an increased confidence in the security of online payments have supported substantial increases in internet sales in recent years. In addition, the option of using the internet to 'click and collect' in-store at a dedicated counter is also increasing in popularity, with the service now accounting for over 50% of John Lewis internet orders[9]. Some retailers are also seeing benefits arising from the use of shops as 'showrooms' where shoppers can view and try goods before making purchases later in their home. More progressive retailers are also providing in-store Wi-Fi (which can be used to inform shoppers of promotions via their mobile phones) and technology points (which can allow shoppers to browse a wider product range than that carried in store). Accordingly, whilst new technology and the rise of internet shopping undoubtedly provides challenges for traditional 'bricks and mortar' retailers, it also brings with it some opportunities.

[6] Article headlined 'Supermarkets: discounters race for space', Property Week, 2 November 2016
[7] 'Experian Retail Planner Briefing Note 14', November 2016
[8] 'Statistical Bulletin: Internet Access Households and Individuals', Office for National Statistics, August 2016
[9] 'Click and Collect', Mintel, September 2014

2.20 In addition, it is important to note that many purchases made online are actually sourced from the shelves of 'bricks and mortar' stores and thereby have the potential to support retail floorspace. This is acknowledged by Experian which now provides adjusted market share figures for special forms of trading in order to reflect purchases which are effected through stores. The adjusted allowance for special forms of trading equates to 3.0% for convenience goods at 2016, increasing to 4.4% at 2021, to 5.1% at 2026, to 5.8% at 2031, and to 6.4% at 2035. For comparison goods, the adjusted allowance is 12.4% at 2016, increasing to 15.0% at both 2021 and 2026, and then reducing slightly to 14.6% at 2031 and to 14.3% at 2035. The adjustment is greater for convenience goods, reflecting the fact that most online food purchases are taken from the shelves of actual stores.

Leisure and the Appetite for More Food and Drink

2.21 In recent years, town centres have also increasingly relied upon an expanding food and drink sector to bring some vacant units back into active use. Eating out has become increasingly popular and both national multiples and independents have benefitted from the additional expenditure which has resulted. Colliers[10] refers to Barclaycard data which identifies that spending in restaurants in the first quarter of 2015 was up 17% year-on-year.

2.22 Food operators increasingly require units which are in amongst the retail heart of a centre, rather than taking space within a food court. As a consequence, modern shopping mall developments tend to mix food operators within the wider offer and upwards of a quarter of units can be occupied by cafes and restaurants. Food and drink operators (particularly national multiples) can be particularly attractive to landlords as long leases can often be agreed due to the cost of fit-outs.

2.23 Colliers[11] also reports that cinema openings are on the up and that niche cinema operators, such as Everyman, Curzon and The Light, are considered to have the potential to be particularly complementary to shopping environments. Such cinemas have more modest land take requirements than large multiplexes, and therefore may have a greater chance of being incorporated in a mixed-use development.

2.24 The health and fitness sector has been buoyed by the popularity of budget gyms. Operators such as Pure Gym, the Gym Group and easyGym have an operational model which is based

[10] 'Midsummer Retail Report 2015', Colliers International, July 2015
[11] Ibid

on low costs and high volume. Such gyms tend to have plenty of equipment in order to encourage uses, but are characterised by basic fit-outs and limited staff. Many budget gym operators – including Pure Gym and the Gym Group – are actively seeking to bring forward additional facilities, with a wide range of properties (including old theatres, larger shop units and office space) having the potential to meet their needs. The Leisure Database Company[12] suggests that there were around 300 budget gyms across the country in summer 2016, but that this figure has the potential to increase to around 1,000 in the near future.

2.25 There are a number of emerging leisure concepts which are also helping to anchor retail environments, including bowling alleys, trampolining and crazy golf. These concepts can assist centres in providing a point of difference with the competition, ensure that visitors' dwell times are increased, and assist a town's evening economy.

Brexit

2.26 The referendum in June 2016 on the UK's membership of the European Union resulted in a majority vote to leave the EU. The terms of withdrawal are to be negotiated with the Commission within two years of formal notification by the Government. A number of commentators have forecast that uncertainty during this time will negatively impact upon consumer confidence and expenditure, and that investor decisions may be put on hold.

2.27 Whilst it would appear that the short-term impact of 'Brexit' on the retail and leisure sector have perhaps been more modest than some analysts suggested, Verdict published an Economic & Retail Update in September 2016[13] in order to highlight potential future issues. Its Update provides the following forecasts:

- Retail growth across Britain in 2016 is expected to be flat and growth in the clothing and footwear sector as a whole is likely to be disappointing. However, the weaker pound means that international travellers may spend more, with international brands and premium goods being particularly attractive.
- However, a weaker pound will also lead to higher import and manufacturing costs, which retailers will pass onto consumers. Verdict anticipates that the food and clothing and footwear sectors will see the greatest inflationary rises.

[12] As reported in the article headlined 'Why budget gyms could be set to take over the sector', Sports Insight, 11 June 2016
[13] 'Economic & Retail Update: H2 2016', Verdict, September 2016

- Brexit may have a negative impact on the housing market and a consequential adverse impact on those retailers who rely on householders investing in their property. Accordingly, there may be less spending on goods such as furniture, floor coverings, DIY and gardening goods and so on.
- In volume terms, Verdict expects little change to the food retail sector, but notes that inflationary pressures might mean than shoppers spend more on their groceries and therefore have less to spend on other goods.

2.28 It is therefore evident that Brexit has the potential to impact on future expenditure growth (and also on population growth). As such, there will be a need to monitor the impacts arising from the UK's exit from the EU and for any future update to this Study to take appropriate consideration of such changes.

Potential Implications for Rossendale

2.29 It is considered that the retail and leisure trends identified have a range of implications for centres across Rossendale Borough. Firstly, the post-recession 'polarisation' trend is considered to have had implications for Rossendale's town and district centres. In the case of Rawtenstall town centre, the Primary Shopping Area currently includes only a handful of national multiples and where larger units have been vacated by major operators in recent years they have been re-occupied by independent traders. An example of this is the former Woolworths unit at 51 Bank Street being let to an independent variety discount store.

2.30 The lack of demand for space within Rawtenstall's retail core by national multiples is likely to be largely down to the relative proximity of larger, higher order centres such as Bury, Rochdale, Burnley and Accrington where many such retailers are already present and where Rossendale residents are historically used to travelling for goods such as clothing and footwear. The positive implication of this, however, is that Rawtenstall town centre benefits from a wide range of quality, independent retailers which occupy prominent high-street locations and provide a diverse offer and unique selling point for the centre.

2.31 A relative lack of appropriately sized modern retail units in Rawtenstall town centre is also likely to be a barrier to further representation by national multiples. However, the redevelopment of the former Valley Centre site as part of the future phases of the 'Spinning Point' town centre redevelopment project has the potential to address this issue, providing the type of units which are compatible with the format requirements of such retailers. The remaining floorspace at New Hall Hey retail park also has the potential to improve Rossendale's representation by national multiples, albeit within an out-of-centre location.

2.32 In the case of Bacup and Haslingden district centres, which are of a lower order and size than Rawtenstall, these have historically had only very limited representation by national multiples and this appears to have reduced further over the past six years or so. Both centres have been negatively affected by changing trends in the banking sector, with two prominent units in each that were once occupied by Barclays and Natwest respectively now standing vacant. The independent comparison goods offer in both of these centres is value oriented with many of the units in each case given over to service uses which serve the day to day needs of the local catchment including hairdressers, salons, cafes, take-aways, etc. However, the fact that former bank units have remained vacant for some time suggests that demand for alternative uses is somewhat limited (this is explored further in Section 5 of our report).

2.33 With regards changing trends in the retailing sector towards 'discount' operators, Rossendale has been no different to the remainder of the UK in witnessing significant investment from such retailers over the past five years or so. For example, Lidl opened their first store in the Borough in 2009, whilst B&M Bargains have since occupied a large former Focus DIY unit in Rawtenstall (2013) and a former Co-operative supermarket in the heart of Bacup (2016). A proliferation of independent discount stores in all three of Rossendale's main centres is also apparent. Finally, Aldi secured planning permission for their first discount foodstore in Rossendale in September 2016 as part of phase two of the New Hall Hey Retail Park scheme (Application Ref. 2016/0129).

2.34 In contrast, the only notable investment by one of the 'big four' foodstore operators in Rossendale since the publication of the previous Retail Study in 2009 has been the delivery of a Morrisons foodstore of 1,105 sq.m net sales on the edge of Bacup district centre in August 2013. This said, the Borough is already particularly well served by mainstream foodstores given its populace; with Asda and Tesco superstores already present in Rawtenstall, and Haslingden served by a major out-of-centre Tesco store.

2.35 The continued growth of online retailing does not appear to have had a direct negative impact upon unit occupancy levels in Rawtenstall town centre, with vacancy rates well below the national average. However, that is not to say that the composition of the centre would not be different without this threat, with the proportion of comparison goods units well below the national average (this goods sector is a particular focus of internet retailing). Rawtenstall may well benefit from the fact that multi-channel retailing is being embraced by some of the major retailers that lie just beyond its PSA. For example, the Asda, Tesco and recently opened Marks & Spencer Simply Food stores provide 'click and collect' facilities, and the ability for Rossendale residents to stay in the Borough when purchasing comparison goods may be of benefit to existing retail and service uses in terms of driving local footfall and spin-off trade.

2.36 Finally, there is evidence that some of Rossendale's centres have benefitted from a growing appetite for food and drink focussed leisure destinations. For example, it is noted that a number of former retail units on Haslingden's high street (Deardengate) have recently been converted to small bars (i.e. Room D and The Live Lounge).

2.37 The implications of the trends identified are explored in greater detail in the final section of our report, where we provide our recommendations in terms of the opportunities and threats facing the Borough's centres. This is also informed by our health check analysis of each centre, undertaken as part of Section 5.

3.0 Planning Policy Context

Introduction

3.1 Given that this Study seeks to provide important evidence to assist in the production of future retail planning policy, it is important to review existing national planning policy of pertinence to retail and town centre matters to explore the context for the Study and how it may impact upon the production of the Local Plan. We also summarise and comment on Rossendale's adopted and emerging planning policy, insofar as it is relevant to retail and town centre matters, in order to consider the Council's strategy in respect of its centres.

National Planning Policy

3.2 The National Planning Policy Framework ('NPPF') was published in March 2012. The NPPF replaces all former Planning Policy Statements, Planning Policy Guidance Notes and some Circulars in a single consolidated document.

3.3 The main theme of the NPPF is that there should be 'a presumption in favour of sustainable development'. In terms of plan-making, it is stated that local planning authorities should positively seek opportunities to meet the development needs of their area, with an emphasis on Local Plans having sufficient flexibility to adapt to rapid change.

3.4 In terms of economic development, it is set out within the NPPF's core principles that planning should proactively drive and support economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs. Every effort should be made to objectively identify and then meet the business and other development needs of an area, with positive responses made to wider opportunities for growth.

3.5 The NPPF stresses the Government's commitment to securing economic growth in order to create jobs and prosperity, with paragraph 17 stating that the planning system should do everything it can to support sustainable economic growth.

3.6 Paragraph 19 indicates that planning should operate to encourage and not to act as an impediment to sustainable growth, and that significant weight should be placed on the need to support economic growth through the planning system. The NPPF seeks to ensure that local planning authorities plan proactively to meet the development needs of business and support an economy fit for the 21st century.

3.7 The NPPF still recognises the need to promote the vitality and viability of towns and cities through the promotion of competition and growth management during the plan period. Paragraph 23 of the NPPF provides guidance for local planning authorities in drawing up Local Plans, it indicates that they should:

- recognise town centres as the heart of their communities and pursue policies to support their vitality and viability;
- define a network and hierarchy of centres that is resilient to anticipated future economic changes;
- define the extent of town centres and Primary Shopping Areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;
- promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
- retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
- 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 centre. 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 sites;
- allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;
- set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;

- recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites; and,
- where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.

3.8 Paragraph 23 also indicates that needs for retail, leisure, office and other main town centre uses should be met in full and should not be compromised by limited site availability.

3.9 Paragraph 24 requires local planning authorities to adopt a sequential approach to the consideration of planning applications for main town centre uses that are not in an existing centre or in accordance with an up-to-date Local Plan. The following paragraph 25 indicates that that the sequential approach should not apply to applications for small scale rural offices or other small scale development.

3.10 Paragraph 26 indicates that local planning authorities should require an impact assessment for retail, leisure and office development outside of town centres which are not in accordance with an up-to-date Local Plan and if the development is over a proportionate, locally set threshold. Where there is no locally defined threshold, the default threshold will be 2,500 sq.m.

3.11 Paragraph 27 indicates that where an application outside a town centre fails to satisfy the sequential test or is likely to have a significant adverse impact on the vitality and viability of a town centre or on existing, planned, committed investment in a centre it should be refused.

3.12 The NPPF also recognises that retail activity should still, where possible, be focused in existing town centres. Retail and leisure proposals which cannot be accommodated in or adjacent to the town centre will have to satisfy a dual impact test and the sequential test.

Ensuring the Vitality of Town Centres Planning Practice Guidance

3.13 Ensuring the Vitality of Town Centres National Planning Practice Guidance was published in March 2014 and replaces the previous Planning for Town Centres Practice Guidance. It provides a more concise summation of how retail and main town centre planning policy is to be applied in practice. However, the objectives of the Practice Guidance remain comparable with those of its predecessor, with there being a stated requirement for local planning authorities to plan positively and support town centres to generate local employment, promote competition within and between town centres, and create attractive and diverse places for users.

3.14 The Practice Guidance requires local planning authorities to fully assess and plan to meet needs for main town centre uses through the adoption of a 'town centre first' approach. Paragraphs 002 and 003 confirm that this should be delivered through a positive vision or strategy which is communicated through the development plan. The strategy should be facilitated through active engagement with the private sector and other interested organisations (including Portas Pilot organisations, Town Teams and so on). Any strategy should be based on evidence which clarifies the current state of town centres and opportunities to meet development needs and support centres' vitality and viability.

3.15 Such strategies should seek to address the following matters:

- the appropriate and realistic role, function and hierarchy of town centres in the area of over the plan period, including an audit of the vitality and viability of existing town centres and their ability to accommodate new development;
- consideration of the vision for the future of each town centre and the most appropriate mix of uses;
- the assessment of the scale of development that a town centre can accommodate;
- the timeframe for new that new retail floorspace can be delivered;
- what other complementary strategies are necessary or appropriate to enhance the town centre to deliver the vision in the future; and,
- the consideration of the enhancement of car parking provision including charging and enforcement mechanisms.

3.16 Paragraph 005 of the Practice Guidance identifies a series of key indicators which are of relevance in assessing the health of a centre over time. Paragraph 005 goes on to state that not all successful town centre regeneration initiatives have been retail led or focused on substantial new development, but have instead involved improvements such as renewed public realm, parking, and accessibility and other partnership mechanisms. Paragraph 007 identifies the importance of planning for tourism as an important component of any overall vision and indicates that local planning authorities should consider specific tourism needs (including locational or operational requirements) and opportunities for tourism to support local services, vibrancy and the built environment.

3.17 Paragraph 009 reaffirms the town centre first policy in the form of the sequential test, which requires local planning authorities to undertake an assessment of candidate sites' availability, suitability and viability when preparing their local plan. Such an assessment should also consider the scale of future needs and the type of land needed to accommodate main town centre uses.

Housing and Economic Development Needs Assessment Planning Practice Guidance

3.18 The Government has issued further Practice Guidance (March 2015) to provide specific instruction in respect of the undertaking of needs assessments (including those for main town centre uses). Paragraph 032 of the Practice Guidance states that plan makers should consider forecasts of quantitative and qualitative need based on a range of data which is current and robust. Local planning authorities will need to take account of business cycles and make use of forecasts and surveys to assess employment land requirements.

The Portas Review – An Independent Review into the Future of Our High Streets

3.19 The Portas Review was published in December 2011. It is an independent review undertaken by Mary Portas into the state of Britain's high streets and town centres. The review considers the reasons why retail spending on the high street is falling, why there has been a decline of Britain's high streets, and the benefits that can be brought about through the protection of Britain's high streets. Portas puts forward 28 recommendations which include actions that Government, businesses and other organisations should take in order to create diverse, sustainable high streets where retailers can thrive.

3.20 The Government published a response to the Portas Review in March 2012. The response acknowledges that in response to the challenges facing the high street, including out-of-centre retail development and online retailing, the high street will have to offer something new and different in order to create a diverse and competitive environment. In its response, the Government accepts a number of recommendations put forward in the Portas Review, including: the implementation of Town Teams (described as visionary, strategic and strong operational management teams for high streets); the provision of funding for pilot areas who are judged to have the best ideas for improving their town centres and high streets; investing in Business Improvement Districts; and support for a new National Market Day. The Government's response seeks to encourage areas to think creatively about how their town centres can be enhanced in order to entice people back, including improvements which could be secured through the redesign of high streets, and the promotion of the evening and night time economy.

Relaxation of Permitted Development Rights

3.21 At a national level, recent changes to the Town and Country Planning (General Permitted Development) Order 1995 have sought to support the diversification and vitality of town centres. The changes follow the Portas Report recommendation to make it easier to change surplus space in order to provide for the effective re-use of buildings.

3.22 The Town and Country Planning (General Permitted Development) (Amendment) (England) Order 2013 came into force on 30 May 2013. It provides, for a period of three years, for the change of use of Use Class B1 offices to residential without the need for planning permission. The Order also provides for the temporary change of use (for up to two years) of uses falling within Use Classes A1, A2, A3, A4, A5, B1, D1 and D2 to uses falling within Classes A1, A2, A3 and B1, subject to the use relating to no more than 150 sq.m of floorspace and subject to the temporary provision not previously being relied upon.

3.23 From 6 April 2014, permitted development rights were further extended to provide for certain additional changes of use without the need for planning permission. The changes came into force under the Town and Country Planning (General Permitted Development) (Amendment and Consequential Provisions) (England) Order 2014 and result in the introduction of two new classifications that affect commercial premises.

3.24 The first provides for the change of use of premises and land from Use Class A1 to use as a 'deposit taker' (effectively comprising banks, building societies, credit unions and friendly societies). The second provides for the change of use from Use Classes A1 and A2 to residential. There are certain restrictions as to where and when the rights can be exercised.

3.25 Subsequent to the above, the Town and Country Planning (General Permitted Development) (England) Order 2015 came into force on 15 April 2015. The Order acts, inter alia, to consolidate and replace the Town and Country Planning (General Permitted Development

Order 1995) and to provide additional permitted development rights. It should be noted that conditions and restrictions apply, and that prior approval is generally required in order to implement development. The new rights include:

- a permitted change of use from amusement arcade/casino (sui generis use) to residential use (Class C3);
- a permitted change from retail (Class A1) to financial services (Class A2);
- a permitted change from retail/financial services (Class A1/A2) to food and drink (Class A3);
- a permitted change from retail/financial services (Class A1/A2), betting offices, pay day loan shops and casinos to assembly and leisure uses (Class D2);
- extension of the temporary permitted development rights introduced in May 2013 for extensions to shops, offices, industrial and warehouse buildings to support business expansion and the economy so they apply permanently;
- the erection of click and collect facilities within the curtilage of a retail shop; and
- modifications to the size of an existing retail shop loading bay.

3.26 The intended consequence of such measures is to secure the redevelopment and reuse of premises. However, it is considered that the relaxation in respect of changes of use to residential are more likely to encourage re-use of offices in larger metropolitan areas which may benefit from a greater supply of office buildings and where previously there may have been some reluctance to grant planning permission for residential uses.

Development Plan

3.27 The adopted development plan for Rossendale Borough currently comprises the Rossendale Core Strategy (2011). We consider the following policies to be of greatest pertinence to the Borough's retail strategy moving forward.

Area Vision Policies

3.28 Policy AVP1 ('Strategy for Whitworth, Facit and Shawforth') sets out how the Council's vision for these settlements within Rossendale will be achieved. In terms of leisure and tourism, the policy states that the area's open moorland, Cowm Reservoir, River Spodden, and Healey

Dell will be conserved and enhanced. It also highlights that proposals supporting recreational pursuits will be encouraged including access, connections and improvements to long distance routes, such as the Pennine Bridleway, Whitworth cycleway and other routes linking the settlements to recreational opportunities (e.g. to the mountain bike trails at Lee Quarry). Finally, it is confirmed that proposals which support the Adrenaline Gateway, and provide tourism and leisure opportunities will be encouraged in this area, including supporting development such as cafes, parking and small scale overnight accommodation.

3.29 With regards the vision for retailing in the Whitworth, Facit and Shawforth areas, Policy AVP1 states that the centre of Whitworth will be consolidated in order to serve the local community and attract some small scale additional shops, and other local facilities.

3.30 Policy AVP 2 ('Strategy for Bacup, Stacksteads, Britannia and Weir') establishes a vision for the settlements of Bacup, Stacksteads, Britannia and Weir and states that proposals for tourism and leisure related developments will be considered favourably. It also seeks to improve connectivity with local visitor attractions such as the Adrenaline Gateway and Lee Quarry. In respect of retailing, the policy states that any such development which does not affect the vitality and viability of any centre will be supported, where it would generate local training and / or employment opportunities, and improve the offer for Bacup.

3.31 Policy AVP 3 ('Strategy for Waterfoot, Cowpe, Lumb and Water') states that the vision for these settlements includes, from a retailing perspective, the consolidation of Waterfoot and its promotion as a local centre for small businesses and independent shops. The policy continues that the centre should incorporate public space provision through a small square or other public focal point and the re-use of derelict/underused sites and buildings such as the Victoria Arcade.

3.32 With regards the strategy for leisure and tourism in the Waterfoot, Cowpe, Lumb and Water areas, Policy AVP 3 seeks the provision of additional leisure and recreation provision within the smaller settlements combined with the promotion of activities in the rural communities and main urban area. This includes the identification of suitable sites for tourism development to support the Adrenaline Gateway.

3.33 With regards Rawtenstall, Crawshawbooth, Goodshaw and Loveclough, the retailing strategy set out in Policy AVP 4 states that a masterplan will be prepared to guide the overall planning of Rawtenstall town centre. It continues that the redevelopment of the Valley

Centre will be prioritised as a mixed-use project that will complement its Conservation Area setting, enhance Rawtenstall's townscape and provide accessible, attractive new streets and spaces for all users, particularly pedestrians.

3.34 Policy AVP 4 seeks to make pedestrian links to Rawtenstall Railway Station from the town centre more direct and attractive, adding that station facilities, including parking, will be enhanced to a standard suitable for commuter use. It also states that the diversity of small shops in Rawtenstall will be retained and enhanced and the potential of the market maximised. Finally, with regards retailing, the policy states that New Hall Hey will be safeguarded for bulky goods retail and business use and that the Council is committed to working with developers to achieve the redevelopment of the site for a combination of retail, business and leisure uses.

3.35 In terms of the strategy for leisure and tourism uses in the Rawtenstall, Crawshawbooth, Goodshaw and Loveclough areas, Policy AVP 4 seeks the rejuvenation of Marl Pits Leisure Centre and Ski Rossendale. It also highlights that Rawtenstall Bus Station will be rebuilt to provide high quality passenger facilities and a landmark new development in the town centre.

3.36 The retail, leisure and tourism strategy for South West Rossendale, as articulated by Policy AVP 5, includes the promotion of outdoor recreational uses such as the Irwell Sculpture Trail, East Lancashire Railway, the River Irwell, and Haslingden Grane and reservoirs. The policy continues that such leisure uses will be supported by appropriately located small scale overnight accommodation, local shops and cafes.

3.37 Policy AVP 6 ('Strategy for Haslingden and Rising Bridge') states that the priority for Haslingden will be to firstly implement a vacant buildings strategy and secondly to enhance Deardengate (Haslingden's high street) through the implementation of measures including: improvements to public space, pavement widening, traffic management measures (including cycle facilities and parking provision), promotion of the Primary Shopping Area for Class A1 and A2 uses, and a focus on enhancing shop fronts (including a consistent approach to the design of shutters).

3.38 In respect of tourism and leisure, the policy states that proposals (including visitor accommodation) will be supported through measures such as improved signage and public access to attractions such as the Halo Panoptican and Haslingden Grane. It adds that

Haslingden Leisure Centre will be further developed as a community sports and leisure facility for the western part of the Borough.

Topic Planning Policies

3.39 Policy 7 ('Social Infrastructure') states that the loss of social infrastructure and cultural facilities such as pubs, post offices, theatres, community halls, youth centres and parks that require a change of use application will be resisted, particularly in local centres and small settlements. Factors including proximity, financial viability, marketing evidence, and significance to the local community will be considered when assessing such applications.

3.40 The policy continues that improvements to and new provision of social infrastructure will be encouraged at suitable locations within the Borough. A positive approach will be taken to the development of new and enhanced social infrastructure, especially where this creates options for a variety of uses and user groups and reduces the need to travel.

3.41 Policy 11 ('Retail and Other Town Centre Uses') states that retail development, together with other town centre uses (including offices, leisure, arts, culture and tourist facilities) will be focused within the defined town, district and local centres; major proposals will be directed to Rawtenstall and large schemes encouraged to locate in the district centres of Bacup and Haslingden.

3.42 The policy establishes Rawtenstall as the highest order centre in Rossendale (a town centre) with Bacup and Haslingden the second tier in the form of district centres. Waterfoot and Whitworth are local centres whilst all others (including Edenfield, Stacksteads, Helmshore and Crawshawbooth) are defined as Neighbourhood Centres. The policy states that this hierarchy supports the Council's vision of achieving a quality retail development at the Valley Centre in Rawtenstall, with ancillary local retail in the other centres. Rawtenstall will also be the focus for medium and large scale retail and leisure development in the Borough.

3.43 Policy 11 continues that both the Primary Shopping Area and town and district centre boundaries have been defined for Rawtenstall, Bacup and Haslingden but that for the smaller settlements of Waterfoot and Whitworth the local centre boundary is the same as the PSA. It also sets out a retail impact testing threshold of 750 sq.m for Rawtenstall town centre, 500 sq.m for Bacup and Haslingden district centres, and 200 sq.m for locations elsewhere in the Borough.

3.44 Finally, the policy highlights that new convenience retail floorspace of greater than 200 sq.m will be resisted outside of Primary Shopping Area boundaries unless:

- Under the sequential test a more appropriate site cannot be identified, or
- It forms part of a wider Council endorsed regeneration scheme, and the proposal will improve consumer choice and diversify employment opportunities, or other agreed benefits; and,
- It can be demonstrated to the Council's satisfaction that it will not have an unacceptable adverse impact on the vitality and viability of other centres.

3.45 Policy 12 ('The Valley Centre, Rawtenstall') relates specifically to the redevelopment of the former precinct in Rawtenstall town centre. It confirms that a high-quality masterplan-led design approach will be developed and will include the following elements:

- A focal point for retailers with other supporting uses appropriate to a town centre;
- Design which responds to the existing townscape in concept, layout and design detailing and enhances Rawtenstall's urban grain;
- Street masterplanning and design which provides active frontages; and,
- A mix of uses that encourages natural surveillance and a safe street environment.

3.46 Policy 13 ('Protecting Key Local Retail and other Services') deals with smaller retail and other service centres and states that these will be supported and protected. It adds that the important role of smaller, independent shops will be supported in all defined shopping centres with schemes to enhance and / or expand such facilities given positive consideration. The policy also confirms that the authority will seek to resist the loss of 'corner shops' where this would have a negative impact for a local community, and that in such circumstances it may be necessary to provide additional information and market the building for a period of at least 12 months. Finally, Policy 13 promotes the retention of existing markets at Bacup, Haslingden and Rawtenstall and states that consideration will only be given to relocation where this forms part of a wider regeneration initiative and it positively re-enforces the role of the market.

3.47 Policy 14 confirms that tourism, and in particular the active sports industry, is important to Rossendale, and is a key opportunity for the Borough as a whole. It states that tourism growth will capitalise on leisure pursuits and the unique sense of place within Rossendale including its heritage assets, giving particular emphasis to the east of the Borough. The policy continues that tourism throughout the Borough will be promoted by:

- Ensuring through the Allocations Document that key sites are identified for tourism in general and specifically to support the Adrenaline Gateway;
- The development, extension and upgrading of footpaths, cycleways and bridleways (specifically the Rossendale Way, Irwell Sculpture Trail and Mary Towneley Loop, and more generally the Public Rights of Way network), and supported by appropriate signage, interpretation and public art;
- Support for the clustering of tourism related activities;
- Events promotion; and,
- Taking a positive approach to development of complementary accommodation and hospitality facilities.

3.48 Policy 14 highlights that Rossendale has a strong cultural offer, and states that proposals for the enhancement of existing facilities and activities as well as the development of new facilities and activities will be considered favourably. This will also include any supporting necessary infrastructure requirements, such as enhanced access through car parking, bike racks, public realm and public transport improvements. Finally, the policy emphasises that planning proposals for the expansion and enhancement of creative industries such as artist studios and the theatres in Bacup and Waterfoot will be given positive consideration.

3.49 Overnight Visitor Accommodation is the focus of Policy 15, which states that the Council will take a positive approach to new, small-scale, high-quality visitor accommodation, including hotels, bed and breakfast establishments, self-catering facilities, bed and tack, camping barns, and sites to be used for camping and caravanning. It continues that proposals will be supported at locations both within and outside of the urban boundary where they are: appropriate to their locality, complementary to existing tourism facilities, accessible, supported by sufficient infrastructure, would have no harmful effects on amenity, landscape or nature conservation, and where 'need' can be demonstrated.

3.50 The policy also highlights that any large scale hotel proposals (40 bedrooms or over) should be located in or adjacent to the town centres of Rawtenstall or Bacup. Outside of these centres, large scale hotel proposals will only be supported where they form part of a wider regeneration scheme, can demonstrate a wider community benefit and access to the site can be provided by a variety of modes.

Other Material Considerations

Rawtenstall Town Centre – Supplementary Planning Document

3.51 The Rawtenstall Town Centre Supplementary Planning Document ('SPD') was released as a consultation draft in February 2012 although has not since been adopted. The aim of the SPD is to establish a policy framework for development management decisions over the next 10 years which is expected to be delivered through three key objectives that will frame the following improvements to the town centre.

3.52 Objective 1: Improve the Town Centre's accessibility and connectivity, so that people find it is easy to get to and move around. This involves the following proposed improvements:

- Relocate the Witch Way Service from Bank Street to the bus station;
- Work with stakeholders to establish a Manchester rail link;
- Provide a new Bus Station and interchange;
- Make it easier for people to park in the town centre;
- Improve pedestrian linkages across St Mary's Way; and,
- Traffic calm Bacup Road and improve pedestrian linkages.

3.53 Objective 2: Create opportunities for investment, entrepreneurship and growth. This will be achieved through the following:

- Enhance Bank Street as a focus for independent retailing;
- Redevelop the Valley Centre and its surrounding context for public open space, shops, leisure and limited office uses;
- Enhance the appearance and draw of the market;
- Encourage new uses on Bury Road and Bacup Road; and,
- Encourage new housing in suitable locations.

3.54 Objective 3: Conserve and enhance the distinctive character of the town centre for residents and visitors alike. The following proposed improvements are identified in order to achieve this:

- Create better pedestrian spaces and improve the quality of the public realm on Burnley Road and Bacup Road to improve linkages to the railway station;
- Enhance the appearance of the town from St Mary's Way;
- Improve the quality of shop fronts;
- Develop new signage across the town centre;

- Identify opportunities for public art;
- Promote the attractiveness and interest of the town centre's hidden assets;
- Encourage a range of events and activities within the town centre.

3.55 Of the various objectives and improvement schemes set out in the SPD, four Priority Investment Areas are identified which tie together a number of projects in order to maximise the regenerative benefits of the document. The Priority Investment Areas are:

- **The Valley Centre** – Redevelopment of the Valley Centre, Police Station, One Stop Shop and Former Town Hall to create a Public Open Space and in the longer term a high-quality mixed-use development;
- **Rawtenstall Market** – Promotion of the market as a more dynamic 'enterprise hub' and physical improvements to the market itself;
- **Rawtenstall Bus Station** – Redevelopment of the Bus Station and enhancements to Bacup Road to create a new transport interchange and improved pedestrian environment; and,
- **Bury Road / Bacup Road** – Enhancement of buildings, streets and open spaces to create a more vibrant and attractive, pedestrian friendly link between the train station and Bank Street.

Conformity of Core Strategy Policies with those at a National Level

3.56 In terms of the conformity of the Core Strategy's policies with the NPPF, given that the document's Area Vision Policies (AVP 1 to AVP 6) focus on specific improvements to individual centres in the Borough, they are considered to be consistent with the thrust of Paragraph 23 of the NPPF and indeed support many of the objectives identified at a national level (including recognising centres as the heart of local communities and promoting competitive town centres that have a diverse retail offer).

3.57 Policy 11 ('Retail and Other Town Centre Uses') of the Core Strategy also appears to conform with the key town centre policy principles set out in the NPPF. For example, it defines a network and hierarchy of centres, establishes the extent of town centres and Primary Shopping Areas, and seeks to ensure that the sequential approach is applied to proposals for 'main town centre' uses on the edge and outside existing centres. Finally, Policy 11 requires such proposals to be subject to the retail impact test where they are larger than a proportionate, locally set testing threshold.

3.58 One point of conflict that we have identified is in relation to Policy 15 (‘Overnight Visitor Accommodation’), which makes reference to a requirement for ‘need’ to be demonstrated for future accommodation outside the urban boundary. The ‘need’ test no longer forms part of national planning policy for ‘main town centre’ uses and as such the requirement for an applicant to apply it in this case would appear to be at odds with the approach advocated by the NPPF.

4.0 Original Market Research

Introduction

4.1 The undertaking of original market research enables in-depth analysis at a local level and allows the evaluation of the trading characteristics of defined centres and stand-alone retail facilities within a set geographic area. The use of specifically commissioned and tailored survey research is fundamental to identifying the likely capacity for future retail floorspace across the Study Area. Accordingly, WYG commissioned specialist market researchers NEMS to undertake a comprehensive household telephone survey to identify consumers' habits and preferences across Rossendale.

4.2 This section of the TCRLTS sets out the findings of the household survey; identifying where residents of the Borough currently undertake their convenience (food) and comparison (non-food) goods shopping, including the proportion which 'leaks' to more distant destinations in surrounding authority areas. The approach to questioning adopted allows for an analysis of both 'main' and 'top-up' food shopping patterns as well as the identification of expenditure flows in seven comparison goods shopping categories (clothing, furniture, DIY, electrical, household, books & recorded media, and chemist goods).

4.3 It has also been possible to compare the findings of the 2016 household telephone survey with those of the 2008 survey which informed the Rossendale Retail and Town Centre Study Update (2009). This section of the report therefore also identifies changes in shopping habits across the Borough over the past eight years or so and provides some commentary on the factors that are likely to have influenced such changes.

Study Area

4.4 In order to establish the shopping patterns of the populace residing within different parts of the Borough, it is firstly necessary to define an overall Study Area (inclusive of the Borough itself and any outlying areas which may look to Rossendale to meet their retail and leisure needs); and, secondly to split this into a series of zones which capture those residents who are likely to exhibit reasonably homogeneous shopping behaviour.

4.5 In the case of Rossendale, the Study Area utilised replicates exactly that of 2009's Retail Study Update. It spans the Borough's administrative area and also includes some land which falls within Hyndburn to the north and Bury to the south. In the case of Bury, this is because the settlement of Ramsbottom lies adjacent to the Rossendale authority area (specifically the village of Edenfield) and there are therefore likely to be flows of trade both north and south of the border. The same can be said at the north-western corner of the study area, where the northern extremity of Haslingden merges with the southern periphery of Accrington.

4.6 In terms of splitting the defined Study Area into zones, the approach adopted as part of the 2009 Retail Study Update has again been utilised and involves dividing the area into four comparably sized sectors for analysis. A relatively straightforward judgement is required in the case of Rossendale, with logic dictating that those who reside in the Borough's three settlements of Rawtenstall, Haslingden and Bacup will most likely each display different behaviour when it comes to shopping. As such it is appropriate to split each into a different zone. The final zone encompasses the south of Rossendale Borough as well as the adjoining settlement of Ramsbottom.

4.7 Finally, it is important to add that retaining the existing boundaries of the Study Area and its component parts enable direct comparisons to be made with the result of the previous household survey in order to identify changes in shopping habits over time.

Household Telephone Survey

4.8 In February 2016, a survey of 400 households was undertaken by NEMS Market Research across the defined four zone Study Area, and included questions on convenience and comparison goods shopping patterns. This was supplemented by a further survey of an equivalent sample size in December 2016 which sought to establish, amongst other things, resident attitudes towards Rossendale's centres (including frequency of use, strengths and weaknesses, improvements required, etc.) and leisure usage patterns.

4.9 NEMS considered the sample size utilised to be robust given the number of survey zones, total population, and the fact that the shopping behaviour of those residing within each of the defined zones is homogeneous. At least one hundred completed interviews were undertaken in each of the four survey zones and the results were then weighted according to the actual population in each zone.

4.10 The questions and full tabulation of results from the household survey are provided at Appendix 3. Table 4.1 below sets out the postcode sectors which comprise each zone and a map of the catchment is provided at Appendix 1.

Table 4.1: Postcodes by Survey Zone

Survey Zone	Postcode Sector
Zone 1 – Haslingden	BB4 4, BB4 5 and BB5 2
Zone 2 – Rawtenstall / Waterfoot	BB4 6, BB4 7, BB4 8 and BB4 9
Zone 3 – Bacup	OL12 8, OL13 0, OL13 8 and OL13 9
Zone 4 – Edenfield / Ramsbottom	BLO 0, BLO 9 and BL8 4

4.11 The results of the household survey are utilised to calculate the expenditure claimed by each existing retail facility within the Study Area, a process which is considered in Section 7 of this report.

4.12 The sections below set out the findings of the 2016 household survey in respect of convenience and comparison goods and also compare its findings with those of the 2008 survey which informed the Rossendale Retail and Town Centre Study Update (2009). Accordingly, we have sought to use the same groupings as presented in the 2009 Study in order to allow comparison between the two datasets.

Food Shopping Patterns

4.13 Table 4.2 on the following page summarises the proportion of 'main' food and 'top up' food shopping trips which are directed to retailers located within the Rossendale area, based upon the results of the household survey.

4.14 It shows that centres and foodstores located within Rossendale currently claim a market share of 54.3% of all 'main' food shopping trips which originate inside the defined Study Area (Zones 1 to 4). Whilst on the face of it this retention rate may appear relatively low (given the number of major foodstores which lie within the Borough's administrative area) it is important to emphasise that Zones 1 and 4 include parts of Hyndburn and Bury respectively and as such it is to be expected that a proportion of the resident populations of these zones will naturally draw upon main food shopping destinations which lie outside Rossendale. Indeed, if Zone 4 (a large proportion of which comprises Ramsbottom) is omitted from the analysis then Rossendale's 'main' food shopping retention rate (from Zones 1, 2 and 3) increases to a far healthier 68.7%.

Table 4.2: Main and Top-up Food Shopping Trips Analysis (%) (2016)

Centre / Shopping Destination	Main (%)	Top-up (%)	Total (%)
Rawtenstall Town Centre (inc. Lidl)	3.6	8.6	4.7
Asda, Rawtenstall (Edge-of-Centre)	22.6	6.2	19.1
Tesco, Rawtenstall (Out-of-Centre)	9.6	7.3	9.1
Bacup District Centre (inc. Morrisons)	6.5	13.2	7.9
Haslingden District Centre	0.9	7.0	2.2
Tesco, Haslingden (Out-of-Centre)	10.2	4.7	9.0
Waterfoot Local Centre	0.2	2.5	0.7
Other Local Centres (Rossendale)	0.4	6.2	1.6
Other Out-of-Centre (Rossendale)	0.2	3.3	0.9
Sub-Total Rossendale	**54.3**	**59.0**	**55.3**
Ramsbottom	15.4	17.7	15.9
Sub-Total Study Area	**69.7**	**76.7**	**71.2**
Bury	8.1	6.9	7.8
Accrington	9.3	8.1	9.0
Rochdale	4.9	0.6	4.0
Burnley	3.5	3.9	3.6
Elsewhere	4.6	3.8	4.4
Sub-Total Outside Study Area	**30.3**	**23.3**	**28.8**
Total	**100.0**	**100.0**	**100.0**

4.15 In terms of the dominant 'main' food shopping destinations within the Rossendale area, Table 4.2 shows that the Asda store on Hollymount Way, Rawtenstall is the most popular for the Study Area's population, with a market share of 22.6% of all main food shopping. As the largest foodstore in Rossendale, this facility's strong attraction is to be expected, particularly given its accessible location. The out-of-centre Tesco foodstores in Haslingden and Rawtenstall are the next most popular 'main' food shopping destinations in Rossendale, attracting 10.2% and 9.6% of all such food shopping trips respectively. Again, the attraction of these stores appears largely reflective of their scale and location.

4.16 Following this, Bacup district centre attracts 6.5% of the Study Area's 'main' food shopping trips and Rawtenstall town centre 3.6%. It should be noted that the trade drawn to the Morrisons store on Lee Street has been included in the Bacup district centre figure, whilst flows to the Lidl store on Bacup Road have been included in the Rawtenstall town centre figure. In both cases the reason for this is the close proximity of these facilities to the respective Primary Shopping Areas of these defined centres.

4.17 In terms of 'main' food shopping trips undertaken by the Study Area population at destinations outside Rossendale, Table 4.2 shows that the majority (15.4%) are taking place in Ramsbottom. This is to be expected given that a large proportion Zone 4's populace resides within this settlement and it benefits from a relatively strong foodstore offer including Tesco, Morrisons and Aldi. Empirical evidence suggests that some 30% of the 'main' food shopping expenditure generated within the defined Study Area is 'leaking' to centres and foodstores beyond it, with the majority attracted to facilities in Bury (8.4%), Accrington (6.4%) and Rochdale (3.6%). The relative proximity of these larger centres, travel to work patterns, and linked trips for the likes of non-food goods, are likely to explain these outflows of 'main' food shopping expenditure from the Study Area.

4.18 In respect of 'top-up' food shopping, this is typically undertaken closer to home and, accordingly, centres and foodstores located within Rossendale currently claim a higher market share of this type of food shopping (59.0%) from the Study Area population than they do in the case of 'main' food shopping. Indeed, if Zone 4 (a large proportion of which comprises Ramsbottom) is omitted from the analysis then Rossendale's 'top-up' food shopping retention rate (from Zones 1, 2 and 3) stands at a very healthy 78.8%.

4.19 The most popular Rosendale 'top-up' food shopping destinations for the Study Area populace include Bacup district centre (including Morrisons, Lee Street), Rawtenstall town centre (including Lidl, Bacup Road) and Haslingden district centre; these centres benefit from market shares of 13.2%, 8.6% and 7.0% respectively. Rossendale's local centres (including Waterfoot (2.5%), Whitworth (3.6%), Helmshore (2.1%) and Edenfield (0.5%)) also attract a combined 8.7% of all 'top-up' shopping undertaken in the Study Area.

4.20 The healthy attraction of the Borough's defined centres for 'top-up' shoppers (which collectively account for 64% of all 'top-up' food shopping undertaken in Rossendale) is considered to be a positive finding of the survey work and may be reflective of the strong independent offer that a number benefit from. The fact that Rossendale's three largest foodstores (Asda and Tesco in Rawtenstall, and Tesco in Haslingden) only attract a combined 18.3% of the Study Area's 'top-up' food shopping expenditure would appear to support this.

4.21 Finally, with regards 'top-up' food shopping trips undertaken by the Study Area's population at destinations outside Rossendale, Table 4.2 shows that the clear majority of these (17.7%) are taking place in Ramsbottom. A further 23% is 'leaking' to centres and foodstores beyond the Study Area altogether, with the majority attracted to facilities in Accrington (8.1%), Bury (6.9%) and Burnley (3.9%).

Table 4.3: Study Area Food Shopping Trips Analysis – Study Area Wide (2008 – 2016)

Centre / Shopping Destination	2008 (%)	2016 (%)	Difference (%)
Rawtenstall Town Centre (inc. Lidl)	2.2	4.7	+2.5
Asda, Rawtenstall (Edge-of-Centre)	26.6	19.1	-7.5
Tesco, Rawtenstall (Out-of-Centre)	10.7	9.1	-1.6
Bacup District Centre (inc. Morrisons)	4.4	7.9	+3.5
Haslingden District Centre	2.8	2.2	-0.6
Tesco, Haslingden (Out-of-Centre)	14.9	9.0	-5.9
Waterfoot Local Centre	1.7	0.7	-1.0
Other Local Centres (Rossendale)	1.9	1.6	-0.2
Other Out-of-Centre (Rossendale)	0.7	0.9	+0.2
Sub-Total Rossendale	**65.9**	**55.3**	**-10.6**
Ramsbottom	7.6	15.9	+8.2
Sub-Total Study Area	**73.5**	**71.2**	**-2.4**
Bury	8.4	7.8	-0.5
Accrington	6.4	9.0	+2.6
Rochdale	3.6	4.0	+0.4
Burnley	2.9	3.6	+0.7
Elsewhere	5.2	4.4	-0.8
Sub-Total Outside Study Area	**26.5**	**28.8**	**+2.4**
Total	**100.0**	**100.0**	**-**

4.22 By aggregating the 'main' and 'top-up' food shopping flows provided by the 2016 household survey to establish Study Area wide convenience goods shopping patterns, it is possible to undertake a like-for-like comparison with the dataset derived from the Rossendale Retail Study Update's November 2008 household survey. This exercise, which is set out in Table 4.3 above, enables the identification of changes in food shopping patterns across the Study Area over the past eight years.

4.23 Having interrogated the two datasets, of particular significance is the fact that whilst the Study Area's overall market share of convenience goods shopping trips has reduced only marginally (-2.4%) between 2008 and 2016, there has been a marked reduction (-10.6%) in the proportion of Study Area residents undertaking their food shopping in centres and foodstores within Rossendale Borough. The key reason for this is that there has been a significant uplift (+8.2%) in Ramsbottom's convenience goods market share over the past eight years, with a new Aldi foodstore (1,036 sq.m net) opening and the centre's Co-operative supermarket (1,334 sq.m net) being converted into a Morrisons store since the 2008 household survey was undertaken.

4.24 Accordingly, Ramsbottom is now retaining far more of the food shoppers who originate within the settlement than it did in 2008, with an uplift of 26.4% identified in its 'home' zone (Zone 4). This has been detrimental to facilities in Rossendale and particularly the Borough's larger foodstores (Asda and Tesco in Rawtenstall, and Tesco in Haslingden), which have witnessed a combined 17.5% reduction in the convenience goods expenditure that they draw from Zone 4.

4.25 Indeed, the reduced trading performance of Rossendale's major, mainstream foodstores is an important trend that can be identified in the 2016 household survey and very much tallies with the national position, as highlighted in Section 2 of this report. Table 4.3 shows that Asda, Rawtenstall's market share has reduced by 7.5% between 2008 and 2016, Tesco, Haslingden by 5.6% and Tesco, Rawtenstall by 1.6%.

4.26 Conversely, Rawtenstall town centre's overall convenience goods market share has increased by 2.5% over the past eight years and this is considered to be largely a consequence of Lidl opening on Bacup Road at the start of the decade and the popularity of such discount foodstores increasing dramatically at a national level since then. There is also evidence of Rossendale residents (combined 2.1% of Zones 1 to 3) travelling to Ramsbottom's Aldi discount foodstore to undertake their food shopping; Aldi is not currently present in the Borough but is likely to be delivered in 2017 under planning permission 2016/0129.

4.27 In terms of the 'leakage' of convenience goods shoppers beyond the defined Study Area, the greatest loss appears to be to Accrington, which has increased its market share by 2.6% over the past eight years to 9.0% in total (2016). Clearly the fact that the north-western extremity of the Study Area includes some of Hyndburn is a factor in Accrington's ability to claim a relatively substantial market share. However, it is also noted that a large Tesco Extra store of 5,878 sq.m (net) has opened in Accrington Town Centre (Eagle Street) since 2008's household survey was undertaken. This appears to attract some 'main' food shoppers from both Zone 1 (Haslingden) and Zone 2 (Rawtenstall), potentially as a consequence of it providing a wider food and non-food offer than Tesco's Rossendale facilities.

Table 4.4: Study Area Food Shopping Trips Analysis – Zonal Basis (2008 – 2016) (%)

Centre / Shopping Destination	Z 1 2008	Z 1 2016	Z 2 2008	Z 2 2016	Z 3 2008	Z 3 2016	Z 4 2008	Z 4 2016
Rawtenstall Town Centre (inc. Lidl)	1.0	2.2	5.0	10.1	1.0	4.6	1.0	0.7
Asda, Rawtenstall (Edge-of-Centre)	16.0	15.1	48.0	37.5	26.0	17.7	12.0	2.6
Tesco, Rawtenstall (Out-of-Centre)	2.0	1.3	20.0	21.6	15.0	9.2	4.0	1.2
Bacup District Centre (inc. Morrisons)	0.0	0.0	0.0	1.8	20.0	31.0	0.0	0.0
Haslingden District Centre	10.0	8.5	2.0	1.2	0.0	0.1	0.0	0.0
Tesco, Haslingden (Out-of-Centre)	35.0	28.5	14.0	5.3	2.0	0.6	10.0	4.6
Waterfoot Local Centre	0.0	0.0	5.0	2.3	1.0	0.1	0.0	0.0
Other Local Centres (Rossendale)	0.0	1.6	1.0	0.4	6.0	4.6	1.0	0.4
Other Out-of-Centre (Rossendale)	3.0	0.3	0.0	2.6	0.0	0.2	0.0	0.0
Sub-Total Rossendale	**67.0**	**57.6**	**95.0**	**82.8**	**71.0**	**68.2**	**28.0**	**9.6**
Ramsbottom	0.0	1.4	0.0	3.4	0.0	2.1	29.0	55.4
Sub-Total Study Area	**67.0**	**59.1**	**95.0**	**86.2**	**71.0**	**70.3**	**57.0**	**65.0**
Bury	1.0	1.0	0.0	2.0	0.0	1.1	31.0	26.8
Accrington	28.0	33.5	0.0	4.6	0.0	0.3	1.0	1.5
Rochdale	0.0	0.0	1.0	0.2	15.0	16.6	0.0	0.0
Burnley	1.0	1.4	3.0	4.9	8.0	7.6	0.0	0.0
Elsewhere	3.0	5.1	1.0	2.1	6.0	4.2	11.0	6.7
Sub-Total Outside Study Area	**33.0**	**40.9**	**5.0**	**13.8**	**29.0**	**29.7**	**43.0**	**35.0**
Total	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**

4.28 By drawing upon the 2008 and 2016 survey datasets it has also been possible to undertake a like-for-like comparison of food shopping patterns on a zonal basis. From scrutiny of the household survey results, which are set out in Table 4.4 above, we note the following trends of relevance in relation to each zone.

4.29 In terms of Zone 1 (Haslingden), empirical evidence shows that over the past eight years more people (7.9%) have begun travelling outside the Study Area in order to undertake their food shopping, with the majority travelling to Accrington. As has already been identified, the fact that part of Zone 1 encompasses the southern periphery of this town and its retail offer has been expended significantly through a new Tesco Extra store since the last survey are likely to be important factors in this shift.

4.30 The increased leakage of food shopping expenditure to destinations outside Rossendale (-12.2%), and indeed the Study Area as a whole (-8.8%), also occurs in Zone 2 (Rawtenstall). The attraction of Ramsbottom's Aldi discount foodstore is largely responsible for a 3.4% increase in Rawtenstall residents visiting this centre for their food shopping. The presence of this operator in Bury and Accrington may also explain an increase in visits to these destinations by residents of Zone 2, with respective increases of 2.0% and 4.6% apparent. Finally, Rawtenstall town centre has increased its market share of the convenience goods expenditure generated in Zone 2 (+5.1%), seemingly at the expense of the town's Asda foodstore which has witnessed a 10.5% reduction in the Zone. The introduction of the centre's Lidl foodstore is likely to account largely for this.

4.31 Turning to Zone 3 (Bacup), the introduction of the Morrisons foodstore on Lee Street in 2013 has resulted in Bacup district centre achieving a significant increase in its convenience goods market share of 11.0% since the household survey of 2008. Empirical evidence suggests that Bacup's residents have diverted from Rawtenstall's Asda and Tesco foodstores, which have witnessed reductions in market share from Zone 3 of 8.3% and 5.8% respectively. Whilst there has been no material change in the proportion of convenience spending taking place by Zone 3 residents outside the Study Area as a whole, it is noted that there has been a 2.1% increase in spending outside the Rossendale area. According to the results of the 2016 household survey, this can be attributed to some Bacup residents now travelling to Ramsbottom in order to use the centre's Aldi discount foodstore, an operator which is not currently present in Rossendale.

4.32 Finally, in respect of Zone 4 and as already touched upon in this section of the report, the introduction of Aldi and Morrisons to Ramsbottom has resulted in a significant increase in its market share of localised convenience goods expenditure since the 2008 household survey. This now stands at 55.4% (an increase of some 26.4%) and has resulted in a substantial reduction (-17.5%) in the trade flowing to Rawtenstall's major foodstores from this zone. Improvements in Ramsbottom's convenience goods offer also appears to have had positive implications for the zone's overall Study Area retention rate, with a 4.2% reduction in expenditure leakage to Bury identified as part of an 8.0% reduction overall.

Comparison Goods

4.33 Turning to comparison goods, we firstly summarise the shopping patterns identified for the seven non-food categories in relation to which questions were asked as part of the 2016 household survey ('clothing', 'furniture', 'DIY', 'electrical', 'small household', 'books, toys, jewellery & recorded media', and 'chemist goods'). This is set out in Table 4.5 on the following page. It should be noted that it has not been possible to compare this data with equivalent information from the 2008 household survey, as the 2009 Retail Study Update did not include a breakdown of expenditure flows by goods category.

Table 4.5: Study Area Non-Food Shopping Trips Analysis – By Goods Category 2016 (%)

Centre / Shopping Destination	Clothing & Footwear	Books, CDs DVDs & Toys	Small Household	Chemist	Electrical	DIY	Furniture	Total Market Share
Rawtenstall Town Centre	7.4	10.9	17.0	26.7	10.1	11.4	14.0	13.0
Bacup District Centre	1.4	0.7	1.0	8.5	2.3	0.1	3.0	2.4
Haslingden District Centre (inc. Tesco)	1.0	4.5	4.4	10.6	3.6	3.7	1.4	3.9
Waterfoot Local Centre	0.0	0.2	0.0	1.1	0.0	2.3	0.0	0.3
Other Local Centres (Rossendale)	0.0	0.2	0.1	2.5	1.4	0.6	0.9	0.7
Sub-Total Rossendale	**9.8**	**16.5**	**22.5**	**49.4**	**17.4**	**18.0**	**19.4**	**20.4**
Ramsbottom	0.8	0.7	2.4	11.8	1.0	5.3	4.5	3.2
Sub-Total Study Area	**10.6**	**17.2**	**24.9**	**61.3**	**18.3**	**23.3**	**23.9**	**23.5**
Accrington	4.9	5.6	7.5	8.1	5.5	3.8	6.8	5.9
Blackburn	7.3	3.8	5.4	0.6	13.4	4.4	5.5	5.8
Bolton	2.3	1.6	2.7	1.2	2.1	0.4	7.9	2.4
Burnley	6.6	11.0	5.4	3.4	13.3	1.4	8.9	7.6
Bury	30.4	36.4	15.5	13.4	30.1	54.6	11.6	27.3
Manchester	20.5	14.0	7.2	3.0	2.2	0.0	6.1	10.7
Rochdale	2.8	2.5	5.9	4.0	5.4	7.7	3.4	3.9
Elsewhere	14.6	8.0	25.6	4.9	9.6	4.5	25.9	12.9
Sub-Total Outside Study Area	**89.4**	**82.8**	**75.1**	**38.7**	**81.7**	**76.7**	**76.1**	**76.5**
Total	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**

4.34 In relation to clothing and footwear, Table 4.5 demonstrates that Study Area residents are undertaking the vast majority of such shopping outside Rossendale (90.2%) and indeed the Study Area as a whole (89.4%). The most popular destination is Bury, which attracts 30.4% of such shopping trips, followed by Manchester, claiming 20.5%, and finally 'Elsewhere' which includes out-of-centre shopping destinations such as the Trafford Centre and accounts for 14.6%.

4.35 Within the Study Area itself, Rawtenstall (the Borough's only town centre) holds the greatest clothing and footwear market share at 7.4%. Whilst this may appear relatively limited it is not particularly surprising given the number of larger, higher order centres which surround Rossendale including Bury, Rochdale, Burnley, Accrington and Blackburn. It must also be acknowledged that Rossendale's proximity to the motorway network, and specifically the

M60, provides the Study Area's population with relatively straightforward access to clothing and fashion goods shopping destinations of regional significance such as the Trafford Centre and Manchester City Centre. Finally, the fact that Bacup and Haslingden contain only a very limited clothing and footwear offer means that these district centres are only able to retain a small amount of such comparison goods expenditure.

4.36 The 2016 household survey records broadly similar shopping patterns in respect of the purchase of books, jewellery, toys, CDs and DVDs as it does for clothes shopping, albeit with Rawtenstall town centre securing a slightly greater market share of such trips at 10.9%. The Study Area's retention rate is also slightly stronger in this sector, with 17.2% of such shopping trips taking place within Zones 1 to 4. Leakage remains substantial however, with Bury, Manchester and Burnley the dominant shopping destinations for books, CDs and DVDs; these destinations claim market shares of 36.4%, 14.0% and 11.0% respectively.

4.37 Table 4.5 identifies that Rawtenstall town centre (which includes the surrounding Asda and Tesco foodstores for the purposes of this comparison goods analysis) attracts 17.0% of shopping trips to purchase small household goods (encompassing such items as tableware, household utensils, textiles and appliances for personal care). Rawtenstall holds the highest market share for this type of shopping according to the household survey, with the Study Area as a whole retaining 24.9% of all expenditure on small household goods. In terms of expenditure leakage from the Study Area, this still stands at 75% in this goods sector, with the majority flowing to Bury (15.5%) and other out-of-centre shopping destinations in the 'Elsewhere' category (25.6%).

4.38 Chemist goods are typically purchased in a similar manner to convenience items, with a large proportion of such trips taking place close to home (due principally to the similar nature of many such goods which reduces the propensity to 'shop around'). The overall retention rate of such trips for centres in Rossendale is 49.4%, with Rawtenstall town centre (26.7%) accounting for the vast majority but Haslingden (10.6%) and Bacup (8.5%) also notable contributors. In looking at the Study Area as a whole (inclusive of Ramsbottom), the retention rate increases to 61.3%, which is considered to be relatively strong given the competition that Rossendale faces from surrounding larger centres. Once again, this is reflective of the fact that chemist goods are generally purchased locally.

4.39 With regards 'electrical', 'DIY & gardening', and 'furniture', it is notable that very similar shopping patterns are identified for each goods category by the 2016 household survey. For example, Rossendale facilities hold a broadly equivalent but limited market share of 17.4%, 18.0%, and 19.4% for electrical goods, DIY & gardening, and furniture respectively. In each case Rawtenstall's retail offer attracts the majority of such purchases made within the Study Area, drawing 14.0% of furniture shopping, 11.4% of DIY & gardening shopping, and 10.1% of electrical shopping. However, there is substantial leakage of expenditure in the case of each goods category, with facilities in Bury attracting 54.6% of DIY & gardening shopping trips and 30.1% of trips for electrical items. The majority of furniture shopping takes place at out-of-centre destinations included in the 'Elsewhere' category, reflective of the fact many furniture retailers occupy units on retail parks.

4.40 The high level of expenditure leakage witnessed from the Study Area in the case the electrical, DIY & gardening, and furniture goods sectors (which stands at 81.7%, 76.7% and 76.1% respectively) can be attributed to the fact that a significant proportion of such items are bulky goods, which are often purchased from retail parks in out-of-centre locations. Given that the choice of such shopping locations across Rossendale and the wider Study Area is very limited and the offers in nearby Bury, Burnley, Rochdale and Blackburn are extensive, it is not surprising that the Study Area's populace are willing to travel in order to meet their shopping needs for these larger, generally infrequently purchased goods.

Table 4.6: Study Area Non-Food Shopping Trips Analysis – Study Area Wide (2008 – 2016)

Centre / Shopping Destination	2008 (%)	2016 (%)	Difference (%)
Rawtenstall Town Centre	17.1	13.0	-4.1
Bacup District Centre	1.4	2.4	+1.1
Haslingden District Centre (inc. Tesco)	3.8	3.9	+0.1
Waterfoot Local Centre	0.5	0.3	-0.2
Other Local Centres (Rossendale)	0.6	0.7	+0.1
Sub-Total Rossendale	**23.5**	**20.4**	**-3.1**
Ramsbottom	1.6	3.2	+1.5
Sub-Total Study Area	**25.1**	**23.5**	**-1.6**
Accrington	8.4	5.9	-2.4
Blackburn	4.9	5.8	+0.9
Bolton	3.4	2.4	-1.0
Burnley	9.5	7.6	-1.9
Bury	22.6	27.3	+4.6
Manchester	11.2	10.7	-0.5
Rochdale	7.5	3.9	-3.6
Elsewhere	7.4	12.9	+5.5
Sub-Total Outside Study Area	**74.9**	**76.5**	**+1.6**
Total	**100**	**100**	**100**

4.41 By aggregating the flows of comparison goods shopping expenditure in the seven goods categories provided by the 2016 household survey it is possible to establish Study Area wide comparison goods shopping patterns. With this data, we can undertake a like-for-like comparison with the dataset derived from the Rossendale Retail Study Update's November 2008 household survey. This exercise, which is set out in Table 4.6 on the preceding page, enables the identification of changes in overall non-food shopping patterns across the Study Area over the past eight years or so.

4.42 Having interrogated the two datasets, it is notable that there has not been a dramatic change in either Rossendale's comparison goods market share from the Study Area, which has declined by 3.1%, or indeed the market share of the Study Area's facilities form the Study Area itself, which has declined by just 1.6% to 23.5% since 2008. Table 4.6 does however highlight some important changes in the attraction of centres (both positive and negative) within the Study Area. Perhaps of greatest significance is the reduction in Rawtenstall's comparison goods market share of 4.1%, whilst Bacup and Ramsbottom have witnessed improvements of 1.1% and 1.5% respectively. The improvement of both of these smaller centres can likely be attributed to the introduction of new foodstores and the comparison goods offers they incorporate. For example, since the 2008 survey Bacup has benefitted from the opening of a Morrisions foodstore, whilst Ramsbottom as seen the introduction of Aldi and Morrisions stores.

4.43 Turning to Rawtenstall, this centre's decline from a Study Area comparison goods market share of 17.1% to 13.0% (-4.1%) can in part be attributed to Bury's improvement by 4.6% to 27.3%. Bury has witnessed the dramatic expansion of its comparison goods offer over the past eight years, with the opening of 'The Rock' shopping centre in the heart of the town centre in 2010. This has added some 55,000 sq.m of additional retail floorspace and includes national multiples such as Marks & Spencer, Debenhams, Next, River Island, H&M and Primark amongst others. It is therefore unsurprising that Rawtenstall, along with other surrounding larger centres such as Rochdale, Accrington, Burnley and Bolton (which have not benefitted from equivalent investment over the same period), have each witnessed their comparison goods market share from the Study Area reduce by between 1.0% and 3.6% since the 2008 household survey.

4.44 It is also noted that the market share of out-of-centre shopping destinations outside the Study Area (defined as 'Elsewhere' in Table 4.6) has risen by some 5.5% over the past eight years or so at the expense of the sub-region's larger centres and potentially Rawtenstall town centre. This is likely to be reflective of ongoing investment in out-of-centre retail parks and shopping centres, be that in the form of new floorspace or tenants. For example, at the time of the November 2008 household survey, the Trafford Centre's Barton Square comparison goods extension had only just opened and its full trading potential is unlikely to have been wholly reflected in the survey results. The 2016 household survey results (which are set out in Appendix 3) suggests that the Trafford Centre currently has a stronger influence over shopping patterns in the Study Area than it did in 2008, today achieving a market share of some 5.6% compared to less than 1% in 2008.

Table 4.7: Study Area Non-Food Shopping Trips Analysis – Zonal Basis (2008 – 2016) (%)

Centre / Shopping Destination	Z 1 2008	Z 1 2016	Z 2 2008	Z 2 2016	Z 3 2008	Z 3 2016	Z 4 2008	Z 4 2016
Rawtenstall Town Centre	10.0	6.9	32.0	29.2	17.0	11.5	7.0	2.3
Bacup District Centre	0.0	0.0	1.0	0.1	5.0	10.5	0.0	0.5
Haslingden District Centre (inc. Tesco)	10.0	12.9	4.0	3.1	1.0	0.6	1.0	0.8
Waterfoot Local Centre	0.0	0.0	1.0	0.8	1.0	0.4	0.0	0.0
Other Local Centres (Rossendale)	0.0	0.9	0.0	0.3	3.0	1.7	0.0	0.2
Sub-Total Rossendale	**20.0**	**20.7**	**38.0**	**33.5**	**27.0**	**24.6**	**8.0**	**3.8**
Ramsbottom	0.0	0.0	0.0	0.2	0.0	0.1	6.0	10.7
Sub-Total Study Area	**20.0**	**20.7**	**38.0**	**33.8**	**27.0**	**24.7**	**14.0**	**14.5**
Accrington	20.0	24.3	5.0	1.8	2.0	1.6	2.0	0.0
Blackburn	16.0	18.5	4.0	4.9	1.0	1.7	0.0	0.6
Bolton	2.0	1.1	2.0	1.3	1.0	1.1	8.0	5.5
Burnley	4.0	1.8	16.0	11.9	17.0	16.7	1.0	0.7
Bury	12.0	16.8	16.0	18.7	5.0	17.6	52.0	50.5
Manchester	10.0	8.4	11.0	13.9	8.0	8.1	15.0	11.2
Rochdale	1.0	0.0	2.0	0.1	31.0	17.8	0.0	0.0
Elsewhere	8.0	8.4	6.0	13.7	8.0	10.7	8.0	16.9
Sub-Total Outside Study Area	**80.0**	**79.3**	**62.0**	**66.2**	**73.0**	**75.3**	**86.0**	**85.5**
Total	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**

4.45 By drawing upon the 2008 and 2016 household survey datasets it has also been possible to undertake a like-for-like comparison of non-food shopping patterns on a zonal basis. From scrutiny of the survey results, which are set out in Table 4.7, we note the following trends of relevance in relation to each of the four Study Zones.

4.46 In relation to Zone 1 (Haslingden) the survey evidence shows a very marginal increase (+0.7%) in the proportion of the zone's population that are shopping for comparison goods in Rossendale when compared with the position in 2008; however, leakage outside the Study Area still stands at some 79.3%. The majority of this leakage is flowing to Accrington (24.3%) and Blackburn (18.5%) which is not particularly surprising given their respective comparison goods offers and the fact that the northern third of this zone encompasses part of Accrington itself. Also of note is the fact that Haslingden's facilities appear to have increased their comparison goods market share from Zone 1 by 2.9%, whilst the draw of Rawtenstall has reduced by 3.1%. This suggests fewer Haslingden residents are prepared to travel to Rawtenstall for comparison goods and are instead using provision closer to home. Evidence provided by Section 5 of this report (health checks) shows that this is not a consequence of an uplift in comparison goods floorspace in Haslingden, with the number of units reducing very marginally by 1% between 2008 and 2016.

4.47 Zone 2 (Rawtenstall) has seen a 4.5% decrease in the proportion of comparison goods shopping being undertaken in Rossendale's facilities, with a 2.8% reduction witnessed in Rawtenstall. However, Zone 2 remains the zone with the highest retention rate of the four which comprise the Study Area (consistent with the position in 2008), with 33.8% of all comparison goods shopping undertaken by its populace taking place in the Study Area's retail facilities. The majority of the comparison goods expenditure which leaks from Zone 2 flows to the higher order centres of Bury (18.7%) and Manchester (13.9%), and both of these destinations appear to have increased their market share since 2008, by 2.7% and 2.9% respectively. This improvement can be attributed to increases in the floorspace and offer of both centres.

4.48 In the case of Zone 3 (Bacup), empirical evidence suggests that Bacup district centre's facilities have increased their market share from the Study Area by some 5.5%, whilst Rawtenstall's have declined by an equivalent 5.5%. This can be attributed to Bacup's retail offer having been expanded since 2008 through the introduction of a sizable Morrisions supermarket which incorporates comparison goods floorspace focusing on chemist goods and small household items in particular. As is the case in Haslingden, the survey also suggests that fewer Bacup residents are now prepared to travel to Rawtenstall for comparison goods and are instead using the provision available closer to home. Section 5 of this report shows that the number of comparison goods units in Bacup increased by 2.4% between 2008 and 2016.

4.49 With regard to the leakage of comparison goods shoppers beyond the Study Area, this currently stands at 24.7% for Zone 3 and has increased by 2.3% from the position identified in 2008. A large proportion of this leaking expenditure flows to Bury, the market share of which has increased by some 12.6% since 2008 (to 17.6%). This can be attributed to the opening of 'The Rock' shopping centre in the heart of the town centre. Zone 3 residents appear to have been diverted from Rochdale's facilities which have witnessed a comparable 13.2% reduction in their market share from the Study Area (Rochdale still draws some 17.8% of the area's comparison goods shopping trips).

4.50 Finally, in relation to Zone 4 (Ramsbottom), the introduction of Morrisons and Aldi foodstores in Ramsbottom town centre (both of which incorporate a proportion of comparison goods floorspace) has resulted in an increase in the zone's market share from the Study Area of some 4.7% to 10.7% in 2016. This appears to have come at the expense of Rawtenstall's facilities, which have witnessed an identical 4.7% reduction in market share from Zone 4 to just 2.3% in the eight-year period since 2008.

4.51 Notwithstanding these localised improvements, the leakage of comparison goods expenditure from Zone 4 to destinations outside the Study Area remains higher than in any other Study Area zone and currently stands at 85.5%. The majority of this (50.5%) flows to Bury's facilities and is to be expected given the strength of the town's offer and ease of access for Zone 4's residents (many of which reside in Bury's administrative area).

5.0 Health Check Assessments

5.1 The NPPF identifies a number of factors which will be of relevance in delivering sustainable development, with one such factor being the need to ensure the vitality of town centres. Paragraph 23 of the NPPF indicates that local authorities should promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. Paragraph 23 also requires local planning authorities to recognise that town centres are at the heart of their communities and to pursue policies that support their viability and vitality. It is also noted that competitive town centre environments should be promoted in order to enhance customer choice, provide a diverse retail offer and in order to reflect the individuality of town centres.

5.2 Whilst the NPPF does not provide a list of indicators to be used to assess the health of a centre, such criteria has been published in the Government's Ensuring the Vitality of Town Centres Planning Practice Guidance of March 2014. Indicators which should be monitored on a regular basis in order to judge the health of a centre and its performance over time include the following:

- **Diversity of uses** – Data on the diversity of uses in the town centre and the district and local centres was collated during our surveys in November and December 2016.
- **Proportion of vacant street level property** – Vacant properties were identified during the undertaking of the surveys.
- **Customers' views and behaviour** – Information on customers' views is based on the NEMS household survey results.
- **Retailer representation and intentions to change representation** – Information on the current strength of centres, retailer representation and retailer requirements has been derived from Venuescore's UK Shopping Venue Rankings and from other published sources.
- **Commercial rents** – Zone A rental data has been sourced from Estates Gazette Interactive (EGi), which is a widely recognised source of such data.
- **Pedestrian flows** – General footfall and pedestrian flows were observed during the undertaking of the centre surveys.
- **Accessibility** – Consideration of access to and around each centre is informed by WYG's surveys.

- **State of town centre environmental quality** – Consideration of the quality of the buildings and public realm in each of the centres has also been informed by WYG's 'on the ground' observations.

5.3 WYG has undertaken health checks of Rawtenstall town centre, Bacup district centre, Haslingden district centre, Waterfoot local centre, and Whitworth local centre. We have also visited the 'Neighbourhood Centres' as identified in Rossendale's Core Strategy (2011) including Edenfield, Stacksteads, Helmshore, Crawshawbooth and Shawforth. Whilst our analysis has had careful regard to the health check indicators of the Planning Practice Guidance, it is important to recognise that in the case of the Borough's smaller centres in particular there is no reliable data available on the likes of property rents or commercial yields. Accordingly, for these lower order centres, our health checks focus on indicators such as diversity of use, pedestrian flows, vacancies, environmental quality, and accessibility.

5.4 Each of our health checks concludes with a summary of the strengths and weaknesses of the particular centre. This allows us to identify deficiencies and areas for improvement, which are then explored further in the final 'recommendations' section of this report.

5.5 We commence our assessment by considering the role of Rossendale's centres in the context of the sub-regional shopping hierarchy.

Sub-Regional Shopping Hierarchy

5.6 Venuescore's index ranks some 3,500 retail venues within the UK (including town centres, stand-alone malls, retail warehouse parks and factory outlet centres) based on the strength of their current retail provision. Towns and major shopping centres are rated using a scoring system which takes account of the presence in each location of multiple retailers – including anchor stores, fashion operators and non-fashion multiples.

5.7 Table 5.1 on the following page illustrates the position of the sub-region's principal centres based on the Venuescore's UK Shopping Venue Rankings 2015-16. We have compared Rossendale with the five closest competing centres currently ranked by the data analyst. The table also highlights the scores achieved for each centre in 2014/15 and 2013/14 (where available) and therefore acts as an indicator of a centre's performance over time.

5.8 Venuescore allocates each centre within a tier, reflecting its level of retail provision. The eight tiers comprise (highest to lowest): 'Major City', 'Major Regional', 'Regional', 'Sub-Regional', 'Major District', 'District', 'Minor District' and 'Local'. The rankings in the table represent the position of the Borough's centres at the time of the most recent 2015 Rankings, as well as competing surrounding destinations.

Table 5.1: Venuescore's Sub-Regional Shopping Hierarchy

Venue	Score (2015 /16)	Local Authority	Location Grade (2015 /16)	2015/16 Rank	2014/15 Rank	2013/14 Rank	Change 2013/14 – 2015/16
Bury	194	Bury	Regional	93	90	97	+4
Accrington	111	Hyndburn	Sub-Regional	230	226	215	-15
Burnley	107	Burnley	Sub-Regional	242	233	246	+4
Rochdale	106	Rochdale	Sub-Regional	245	229	220	-25
Rawtenstall	**32**	**Rossendale**	**District**	**1,003**	**1,021**	**1,001**	**-2**
Ramsbottom	22	Bury	Minor District	1,429	1,680	1,684	+255
Bacup	**15**	**Rossendale**	**Local**	**2,034**	**1,895**	**-**	**-139**
Haslingden	**11**	**Rossendale**	**Local**	**2,827**	**N/A**	**-**	**-**

Source: Venuescore UK Shopping Venue Rankings 2015/16, 2014/15 and 2013/14.

5.9 In the case of Rawtenstall, Table 5.1 shows that the town centre achieved a score of 32 in 2015/16, which equates to a rank of 1,003 (from 3,500 destinations nationally). This rank was down just two places from 2013/14, which suggests that there has been no dramatic shift in the centre's performance either positively or negatively over the past few years. As would be expected, Rawtenstall is the highest ranked centre in the Study Area, with its role ensuring that it occupies a significantly more elevated position in the Rankings than the district centres of Haslingden and Bacup.

5.10 However, four of the five closest centres outside Rossendale (which are evaluated by Venuescore) achieve a ranking which is considerably superior to that of the town centre. For example, Bury, Accrington, Burnley and Rochdale are all at least 750 places higher in the analyst's national hierarchy, with only Ramsbottom (-426) below. This factor is reflected in Venuescore's location grading system, which ranks Rawtenstall as a 'district' level centre, whereas Accrington, Burnley and Rochdale are classified as 'sub-regional' centres and Bury 'regional'. Given this, the degree of comparison goods expenditure leakage witnessed from the Study Area is not particularly surprising, with a number of higher order centres located within a 15 to 20-minute drive-time which provide a more extensive retail offer.

5.11 Bacup and Haslingden are the only other Rossendale centres that are included in Venuescore's scoring system. As Table 5.1 shows, with ranks of 2,034 and 2,827 respectively, Bacup and Haslingden are evidently lower order centres which serve a more localised catchment than both Rawtenstall town centre and the centres within Rossendale's immediate vicinity. Accordingly, both Bacup and Haslingden are classified as 'local' level centres under Venuescore's classification grading system. Whilst historic data does not appear to be available for Haslingden, it is noted that Bacup has fallen some 139 places in Venuescore's ranking system between 2014/15 and 2015/16.

5.12 In summary, our analysis of the Venuescore data highlights that whilst Rawtenstall is clearly the highest ranked centre in the Study Area and falls within the top 30% of all UK shopping venues, it is ranked well below competing centres within immediately adjoining authority areas (which fall within the top 7% or above nationally). Accordingly, shopping patterns in Rossendale will naturally be influenced by these accessible, higher-order venues which benefit from a wider retail offer

Rawtenstall Town Centre

Context

5.13 Rawtenstall is a traditional market town with a historic role as an important industrial and manufacturing centre during the industrial revolution. It now acts as the key focus for retailing, leisure and commercial activities within the Borough and benefits from Rossendale's largest defined centre.

5.14 The main focus for retailing in Rawtenstall town centre is concentrated along Bank Street, which can be described as a traditional, linear high-street comprising small terraced units. Much of Bank Street has retained traditional stone cobbles to its vehicular and pedestrian highway and this adds considerably to the centre's environmental quality, alongside attractive period architecture. The 2011 Core Strategy defines the length of Bank Street as Rossendale's Primary Shopping Area, which includes the centre's Primary Shopping Frontage. Both this road (and much of the wider centre) is covered by the Rawtenstall Town Centre Conservation Area, ensuring a high-design quality is maintained throughout.

5.15 At the northern end of Bank Street at its junction with Newchurch Road is Rawtenstall's market. The town centre benefits from both a permanent indoor covered market and outdoor market stalls which are located alongside one another. There is a large free car park to the rear. Markets are held every Thursday and Saturday with a wide range of products available including food, clothing, household goods, furnishings and so on. The regular market is supplemented a specialist farmers market on the last Sunday of each month. This takes place on Rawtenstall's town square, and showcases local produce and products.

5.16 At the southern end of Bank Street at its junction with Kay Street is a cleared site which currently accommodates temporary public realm ('Town Square'). The rectangular site, which extends to over one hectare, was formally occupied by the Valley Centre, a redundant shopping precinct which was demolished in 2012. This precinct historically formed part of Rawtenstall's Primary Shopping Area and indeed remains defined as such in the Borough's Core Strategy (2011).

5.17 The site of the former Valley Centre represents the main development opportunity site within Rawtenstall town centre, with Policy AVP4 of the Core Strategy supporting redevelopment of the land for *"a mixed-use project that will complement its Conservation Area setting, enhance Rawtenstall's townscape and provide accessible, attractive new streets".* Planning permission for the first phase of the site's redevelopment was granted in March 2016 and involves the relocation of the town's bus station to part of the site alongside retail/café units (154 sq.m), car parking and landscaping (Application Ref. 2015/0476). The consented scheme also includes demolition of the town's former police station, town hall annex and public toilets, alongside part demolition and works to the old Town Hall building. It is noted that permission was granted in January 2017 for the variation of a number of conditions pursuant to Application Ref. 2015/0476 in order to facilitate the scheme's implementation, this suggests that development could commence during 2017.

5.18 In terms of future phases of the former Valley Centre's redevelopment, at the time of writing it is understood that the Council and its development partner are in the process of drawing up options for a mixed-use scheme ('Spinning Point') encompassing a range of 'main' town centre uses such as retail, restaurants, leisure and potentially community space. A planning application for this subsequent phase of development is anticipated during 2017 and thus Rawtenstall town centre may be in line to benefit from a major investment before the end of the current decade. Such a development has the potential to result in a step change in the town centre's retail, evening and leisure economies, depending on the end uses, and would also create significant 'spin off' benefits for existing businesses.

Diversity of Uses

5.19 We have reviewed the diversity of retail and leisure uses accommodated in the town centre (by number, type and quantum of floorspace provided) and provide our findings below. A plan illustrating the location and use of each unit in the town is provided at Appendix 2. In drawing upon Appendix E of the 2009 Retail Study, it has been possible to compare the diversity of uses within the centre (by proportion of units) in 2016 with the position in 2008.

Table 5.2: Rawtenstall Town Centre Diversity of Use

Venue	Floorspace			Number of Units			
	Sq.m	% Centre 2016	% UK 2016	Number of Units Centre	% Centre 2016	% Centre 2008	% UK 2016
Convenience	6,277	28.0%	15.2%	18	13.0%	8.1%	8.7%
Comparison	7,452	33.3%	35.6%	40	29.0%	30.6%	31.7%
Retail Service	2,028	9.1%	6.7%	26	18.8%	12.1%	14.1%
Leisure Service	2,501	11.2%	24.6%	23	16.7%	10.4%	23.5%
Financial Service	1,698	7.6%	7.9%	19	13.8%	12.1%	10.5%
Vacant	2,431	10.9%	9.2%	12	8.7%	26.6%	11.2%
Total	**22,387**	**100%**	**100%**	**138**	**100%**	**100%**	**100%**

Source: WYG site visit of December 2016.
UK average figure derived from Experian Goad November 2016.
Figures recorded from existing town centre boundary.

5.20 Table 5.2 indicates that the current level of convenience units in the town centre is above the national average level of provision, with the 18 units comprising 13.0% of the stock and providing in the order of 6,277 sq.m (28.0%) of the floorspace. There has been an increase in the proportion of convenience goods units serving the centre between 2008 and 2016, with a rise of some 4.9% identified. The relatively strong level of convenience goods units and floorspace in Rawtenstall town centre reflects its role as a traditional market town and key service centre for the Borough.

5.21 The most significant entrant since 2008 is the Lidl discount foodstore on Bacup Road which opened in late 2009; however, the introduction of a large new butcher's shop (M. Harrison) on Bank Street and various new confectioners in the centre are other examples of improvements in this sector. With the exception of the Lidl foodstore, the existing convenience retail provision within the town centre boundary (as currently defined) still tends to be small in scale and generally only meets the top-up needs of shoppers in the area. It is also notable that the vast majority of these smaller stores are run by independent traders, with only Greggs the baker identified as a national multiple.

5.22 Turning to comparison goods, both the proportion of floorspace (33.3%) and units (29.0%) are marginally below the national average figures of 35.6% and 31.7% respectively. However, it is important to bear in mind that immediately west of the town centre's boundary is an Asda superstore containing some 2,500 sq.m (net) comparison goods floorspace, whilst New Hall Hey Retail Park Phase 1 (3,500 sq.m net comparison goods floorspace) lies further west. Accordingly, this immediately surrounding non-food competition is likely to be a factor in the slightly lower than average proportion of floorspace and units identified.

5.23 It is notable that Rawtenstall town centre contains only one of the top 30 comparison goods retailers as identified by Experian Goad, which in this instance is Boots the Chemist on St. Mary's Way. Indeed, there are no other national multiple comparison goods retailers present within the centre and evidence suggests that where such operators have left in recent years the units have been re-occupied by independent traders. An example of this is the former Woolworths unit at 51 Bank Street being let to an independent variety discount store.

5.24 The lack of demand for space within Rawtenstall's retail core by national multiples is likely to be largely down to the relative proximity of larger, higher order centres such as Bury, Rochdale, Burnley and Accrington where many such retailers are already present and where Rossendale residents are already used to travelling for goods such as clothing and footwear. With an already captive market, the demand from these national multiples to gain representation in Rossendale as well is more limited. The positive implication of this, however, is that Rawtenstall town centre benefits from a wide range of quality, independent non-food retailers which occupy prominent high-street locations and provide a diverse offer and unique selling point for the centre. Notable examples include women's clothing retailer Sunday Best, which occupies a large unit in a prominent position in the Primary Shopping Area, and Simply Electricals which also occupies a double frontage unit on Bank Street.

5.25 There has been a notable increase (+6.7%) in the provision of retail service outlets in the town since the centre survey of 2008, with the majority of new units operating as hairdressers, salons or beauticians – reflecting the national growth trend for this sector. As we would expect, these units tend to be located within the smaller units with lower rental values along the secondary frontages and in more peripheral areas of the town. For example, there appears to be a particular cluster of salons at the southern end of Kay Street, although all appear to perform well from our observations. Other key retail service units in the centre include three independent opticians, a travel agent, and a Post Office also on Key Street.

5.26 The Use Class A3, A4 and A5 food and drink ('leisure service') sector comprises restaurants and cafes, drinking establishments and hot food takeaway units, but excludes other types of leisure outlets such as cinemas, sports centres and bingo halls. Table 5.2 highlights that, in terms of both proportion of floorspace (11.2%) and number of units (16.7%), Rawtenstall falls well below the national average for the provision of leisure service uses. Whilst three small cafes were identified along Bank Street for day time customers, the centre's evening economy appears to be particularly lacking, with only three Class A3 restaurants identified in the town centre boundary and four public houses / bars. The majority of the centre's Class A4 ('drinking establishment') uses and Class A5 ('take away') uses are concentrated along Bacup Road towards the southern end of the centre. The fact that a number of the vacant units along this stretch are former drinking establishments provides further evidence that the centre's evening economy leisure offer is in need of improvement.

5.27 The financial and professional services sector (falling within Use Class A2) includes a variety of national and independent businesses, including banks, building societies and estate agents. Table 5.2 shows that the proportion of financial and professional service floorspace within Rawtenstall is broadly in line with the national average, although the number units providing this offer is some 3.3% above the UK average and is also slightly higher than the position recorded in the centre in 2008. In terms of the offer available, Rawtenstall benefits from four national retail banks including Barclays, Natwest, Santander and Lloyds, although we note that HSBC has closed since the 2009 Retail Study. The town centre also accommodates six estate agents, three solicitors, and five other professional service providers.

5.28 In addition to the units categorised in Table 5.2, the town centre also contains a number of non-retail and service uses, including two dentists, two offices, two government buildings, an education centre, a postal sorting office, and a nursery. The non-retail and service uses make an important contribution to the centre's role in providing a hub for community facilities and jobs, as well as contributing to the overall vitality and viability of the town centre and its designation.

5.29 To summarise, our diversity of use analysis for Rawtenstall has shown that the centre benefits from an above average stock of convenience goods floorspace and units, and that this is reflective of its role as a traditional market town and key service centre for the Borough. Whilst the centre's proportion of comparison goods floorspace and units is slightly below the national average, and national multiples are few in number, the centre does benefit from a wide range of quality, independent non-food retailers which occupy prominent high-street locations and provide a diverse offer and unique selling point for the centre. In terms of service uses, whilst both the retail and business service sectors appear to be performing well, the proportion of leisure floorspace and units is below the national average, with the evening economy leisure offer in particular need of improvement

Vacancies

5.30 The number of vacant units within a centre can provide a good indication of how a town is performing. However, care should be taken when interpreting figures as vacant units will be found in even the strongest of town centres as it is to be expected that there is some 'churn' in the market with units changing representation. On other occasions properties may lay vacant because they are poorly maintained, unsuited to modern retailing requirements or are simply not being actively marketed. Conversely, a low vacancy rate does not necessarily mean that a centre is performing well; for example, if there is a proliferation of charity shops and other uses not usually associated with a town centre it may be a sign of decline, particularly where these uses are located in prime locations

5.31 Our site visit of December 2016 identified approximately 2,431 sq.m of vacant floorspace across 12 units within the centre. Importantly, there are only two vacant units within the defined Primary Shopping Area (most notably the former HSBC on Bank Street) which emphasises the strength of Rossendale's retail core. The majority of the centre's vacant units are towards the southern end of the centre along Bacup Road and at its junction with St Mary's Way (seven in total). This part of the centre (Bacup Road) also contains Rawtenstall's only real 'concentration' of vacancies, encompassing the former Heritage Arcade, an adjacent bar / nightclub and a former furnishing and flooring shop ('Domus'). Together, these units are estimated to account for in the order of 1,800 sq.m of the vacant floorspace within the centre, or 75% of the total.

5.32 Table 5.2 shows that the town centre's overall vacancy rate in respect of units is 8.7%, well below the national average of 11.2%. Conversely, the proportion of vacant floorspace is slightly above the national average at 10.9%. However, this can largely be attributed to the cluster of three sizable vacant units on Bacup Road referenced in the paragraph above. The table also suggests that Rawtenstall's vacancy rate has dropped dramatically between 2008 and 2016 (by 17.9%). However, it is important to bear in mind that the Valley Centre was largely vacant at the time of the Borough's previous Retail Study and has since been demolished. This is clearly a major factor in the reduction witnessed in the centre's street level vacancies.

Customer Views and Behaviour

5.33 The household survey undertaken by NEMS sought to identify how frequently respondents visited particular centres and what their views were in respect of the centres they did visit. We summarise the principal findings of the survey in respect to those questions of relevance to the health of Rossendale town centre below. Full details of the survey can be found at Appendix 3 of the TCRLTS.

5.34 Question 21 of the household survey established that Rawtenstall town centre had been visited by 58.2% of the Study Area's population. The majority (42.1%) of those who stated that they did not visit the centre (Question 22) gave the reason that it was *'too far away from home or work'*, suggesting that the centre does not have the strength of attraction to draw those who might live closer to alternative provision (i.e. Zone 4 residents who live closer to Ramsbottom). This is evidenced further by the fact that the second most popular answer to Question 22 (provided by 7.9% of respondents) was *'lack of choice and range of shops'*.

5.35 Perhaps unsurprisingly, Question 25 of the survey established that Rawtenstall town centre was the most frequently visited centre in Rossendale, with 63.5% of respondents recording their preference for this destination. The cross-tabulated results of Questions 26 to 29 of the household survey (by centre) tell us that the majority of those who visit Rawtenstall do so at least one or two times per week (71.4%), will typically arrive by car (74.9%) or on foot (15.8%), and that their main reason for visiting is the centre's *'choice and range of shops'* (29.4%) or *'to visit a supermarket'* (28.7%). The picture painted by these responses mirrors the conclusions of our fieldwork observations; that Rawtenstall functions as an important retail and service centre with a focus on meeting the Borough's day-to-day convenience, comparison and service needs.

5.36 Question 29 of the household survey sought to establish whether there are any measures that would encourage those respondents who already visited Rawtenstall town centre to do so more often. The vast majority (52.2%) stated that there were no improvements which would increase their frequency of visit, indicating that regular users are largely happy with the town centre's offer. The second most popular response was *'additional parking'* (6.9%) albeit our observations are that parking opportunities within and immediately surrounding the town centre are good, if the free provision at the Asda and Tesco foodstores is accounted for. An '*increased choice and range of shops'* was the third most popular response (6.3%) and may be reflective of the limited number of national multiple retailers who are represented in Rawtenstall.

Retailer Representation

5.37 The retailer representation indicator is an important sign of the vitality and viability of a centre as it demonstrates the existing and potential future level of operators in the locality. Accordingly, we have reviewed national and independent retailers which are present within Rawtenstall town centre, recognising that multiple retailers can act as anchor tenants in the centre and can add to its appeal and create additional pedestrian footfall. We have also had regard to the Venuescore UK Shopping Rankings in identifying the retail hierarchy of Rawtenstall and other nearby centres.

5.38 As has already been identified by our health check analysis, Rawtenstall town centre only contains one of the top 30 retailers as identified by Experian Goad, (Boots the Chemist on St. Mary's Way). However, other national multiples include the centre's banks (Barclays, Natwest, Santander and Lloyds), Greggs the baker, and four of the centre's charity shops (Cancer Research, Barnardo's, RSPCA and Age UK). It is also acknowledged that large format Asda, Tesco, and B&M Bargains units are located immediately beyond the town centre boundary.

5.39 The lack of national multiple comparison goods retailers in the town centre can be put down to a number of factors, including the stock of available units, competition from out-of-centre retail destinations (New Hall Hey), and the proximity of higher order centres such as Bury, Rochdale, Burnley and Accrington – where many such retailers are currently present and are already successfully serving the Rossendale catchment from. This is reflected in the Venuescore UK Shopping Rankings, which places Bury, Accrington, Burnley and Rochdale town centres at least 750 places higher than Rawtenstall in the analyst's national rankings.

5.40 However, Rawtenstall's limited number of multiple retailers should not necessarily be perceived as a weakness, as it has evidently benefitted the centre's independent offer, which currently appears to be thriving. The Town Centre has a wide range of quality, independent retailers which occupy prominent high-street locations, alongside a strong indoor and outdoor market offer. This has enabled Rawtenstall to successfully distinguish itself from other retail destinations in the sub-region, which are reliant on multiple retailers to drive footfall. The centre's below average vacancy rate, including only two vacancies in the Primary Shopping Area, represents further evidence that demand for representation in Rawtenstall's retail core is strong, even if this demand is not from multiple retailers.

5.41 As a final point, it is important to highlight that a relative lack of appropriately sized modern retail units in Rawtenstall town centre is likely a barrier to further representation by national multiples. The redevelopment of the former Valley Centre site as part of the future phases of the Spinning Point project has the potential to address this issue, providing the type of units which are compatible with the format requirements of such retailers.

Commercial Rents

5.42 To help assess the state of the retail property market within Rawtenstall, a review of retail units currently being marketed has been undertaken using EGi. EGi provides information on the rental values that have been achieved in the town centre. There are seven properties currently being marketed within the defined town centre boundary and Table 5.3 summaries the rental values attributed to each.

Table 5.3: Properties Currently Being Marketed (by Rental Price Per Annum)

Address	Use	Size (sq.m)	Rental Price Per Annum
14 Bury Road, Rawtenstall, BB4 6AA	Class A1 (Retail)	69 sq.m	£9,750
16 Bury Road, Rawtenstall, BB4 6AA	Class A1 (Retail)	36 sq.m	£9,750
18 Bury Road, Rawtenstall, BB4 6AA	Class A1 (Retail)	71 sq.m	£11,500
6a Ormerod Street, Rawtenstall, BB4 8EB	Class A1 (Retail)	67 sq.m (Ground) 124 sq.m (First)	£12,000
20 Bury Road, Rawtenstall, BB4 6AA	Class A1 (Retail)	94 sq.m	£14,000
89-91 Bank Street, Rawtenstall, BB4 7QN	Class A1 (Retail)	141 sq.m (Ground) 201 sq.m (First)	No. 89 - £13,500 No. 91 - £18,000

5.43 Three of the properties currently being marketed fall within the Primary Shopping Area (89 – 91 Bank Street and 6a Ormerod Street), whilst the remaining four are located in close proximity on Bury Road towards the south of the centre in a more peripheral location. The average rental value of the four properties located on Bury Road is £11,250 pa, whilst the average for the three within the Primary Shopping Area is £14,500. It is to be expected that rental values are higher within the Primary Shopping Area and these findings are consistent with this assumption. The relatively limited number of properties currently being marketed can be attributed to the centre's low vacancy rate.

Pedestrian Flows

5.44 During our survey of the centre in December 2016 and subsequent visits, we have observed pedestrian activity and considered the retail 'circuit' evident in Rawtenstall town centre. The greatest levels of pedestrian traffic were witnessed along the length of Bank Street (the Primary Shopping Area) with notable levels also observed along Kay Street, which benefits from the centre's Post Office, St. Mary's Way, which is home to Boots the Chemist, and Newchurch Road, where the indoor and outdoor markets are located. Some 'linked-trips' to the Primary Shopping Area by those shopping at the Asda superstore off St. Mary's Way were also observed.

5.45 Despite providing access to the town centre's Lidl foodstore and the bus station, Bacup Road benefited from a lesser level of footfall than we had expected. Whilst the vacancy rate along this stretch is no doubt a contributing factor, the concentration of evening economy uses (pubs, bars and hot food take aways) which are largely closed during the day-time undoubtedly exacerbates the issue. We would also add that the volume of traffic along Bacup Road combined with some relatively tall buildings and narrow footways does not make for a particularly pedestrian friendly environment.

5.46 We anticipate that the forthcoming phases of the Spinning Point town centre redevelopment scheme will have a tangible impact on both the number of people visiting the centre and how people make their way around the centre. Most obviously, the new bus station (Phase 1) will bring those arriving via public transport closer to Bank Street and the heart of the centre. Meanwhile, the future phases will likely deliver anchor retail and / or leisure uses which drive a greater amount of pedestrian traffic to the south of the centre. Consequently, there will likely be opportunities for complementary businesses to benefit from 'spin off' trade on Bacup Road, Kay Street, St. Mary's Way and other nearby thoroughfares.

Accessibility

5.47 The accessibility of a centre is determined by the ease and convenience of access by a choice of means of travel – including that which is provided to pedestrians, cyclists and disabled people – and the ease of access from the main arrival points to the principal attractions in the centre.

5.48 Our observations suggest that Rawtenstall benefits from good accessibility via a range of transport modes. In terms of visits by private car, the town centre's main car parks comprise Kay Street (101 spaces), Phipps Buildings on Bank Street (69 spaces), Millgate (41 spaces), James Street (35 spaces), Crankshaw Street (26 spaces) and Newchurch Road (24 spaces). Whilst these main Rossendale BC operated car parks provide an estimated 296 long and short stay spaces, smaller scale provision in and around the centre provides an additional 159 spaces, taking the Council's total provision to some 455. In addition, substantial car parking is provided at the Asda foodstore, which is available for use by town centre shoppers (for a time limited period), and provides a further 576 spaces. Accordingly, it is clear that Rawtenstall town centre benefits from ample public car parking provision given the size of the centre. It is also noted that car parking within the town centre is free, and this in our view plays an important role in supporting trade and driving footfall within the town centre.

5.49 Rawtenstall's railway station is located to the south west of the town centre boundary on the opposite side of Bury Road. It is conveniently located to provide access to the town centre and operates services to Bury every weekend throughout the year and Wednesdays, Thursdays and Fridays between Easter and the end of September. The service, which is operated by East Lancashire Railway as a 'heritage railway', currently caters for tourist visitors to the town and is one of the Borough's most successful attractions. Notwithstanding this, there is the potential for it to function as a true commuter facility in the future, which would aid in the transit of visitors into the centre throughout the week.

5.50 Rawtenstall's existing bus interchange is located on Bacup Road, immediately north of the town's Lidl foodstore and south of James Street. The facility provides regular services to other destinations within the Borough, such as Waterfoot, Haslingden and Bacup, as well as neighbouring towns including Ramsbottom, Bury, Rochdale and Bolton amongst others. Planning permission was granted in 2016 for Phase 1 of the Spinning Point town centre redevelopment scheme, which will involve the relocation of the bus interchange to land north of Bacup Road on part of the site formally occupied by the Valley Centre. A larger, more modern facility with better pedestrian linkages to the town centre's retail core is anticipated to increase visits to Rawtenstall via this mode of public transport, which would evidently be to the overall benefit of the centre's vitality and viability.

5.51 In terms of accessibility on foot, free movement from the west is somewhat hindered by the A682, a dual carriageway which runs north to south. Whilst a number of controlled crossing points are provided, their frequency could be increased to make pedestrian movement more straightforward. Bacup Road is also relatively heavily trafficked and again controlled pedestrian crossing points are limited. However, once in the centre, pedestrian accessibility is relatively strong. For example, whilst Bank Street is not pedestrianised its cobbled surface slows the movement of vehicles and feels more like a shared space. Footways surrounding the Primary Shopping Area (Kay Street and Newchurch Road) are also relatively wide and of a good standard, creating an attractive pedestrian environment.

Environmental Quality and Safety

5.52 Much of the town centre is included within Rawtenstall town centre Conservation Area, which was originally designated in 1990 and has been the subject of a subsequent extension. The Conservation Area Character Appraisal was adopted for development control purposes in December 2011. It highlights that there are 19 listed buildings in the Conservation Area, including the Public Library, War Memorial, Queen's Arms Hotel and St Mary's Church (all St. Mary's Way), as well as the Longholme Methodist Church and former Longholme Parsonage on Bacup Road. The appraisal also identifies a number of townscape features which define the Conservation Area including: its historic core of mainly 19th century commercial, institutional, and industrial buildings; the long curve of Bank Street and its traditional paving; and, the contrast between the large scale of the surviving mills and the small scale of the terraced houses which once provided the mill workers' housing. The Character Appraisal highlights that these features, in conjunction with the town's listed buildings, help characterise the area and enrich the Rawtenstall experience for residents and visitors alike.

5.53 With regards the environmental quality of specific parts of the centre, Bank Street can be regarded as a particular strength (as noted in the Conservation Area Appraisal) with much of this benefiting from a traditional cobbled highway surface with sandstone to pedestrian routes. Beyond this, on surrounding roads such as Kay Street, it is noted that the pedestrian highway is surfaced with bricks and stone flags rather than tarmacadam, which again contributes to a strong environmental quality in and around the centre's Primary Shopping Area. Bank Street and its surrounding routes also benefit from landscape planting at regular intervals accommodating seasonal planting schemes and conveniently located street furniture. At present the centre's core also features an extensive area of public realm known as 'town square' on the site of the former Valley Centre, which includes landscape planting, amenity grassland, and trees in raised planters. However, this public realm is understood to be temporary in nature, with the site earmarked to accommodate a future retail or leisure anchor development.

5.54 The other parts of the centre that we observed were generally tidy, free from litter and benefit from and well-maintained streets. However, there are certain parts of the centre, notably along Bacup Road and Bury Road which appear somewhat 'tired' by comparison, primarily due to their location on busy arterial roads with less maintained shopping frontages. We would add that the presence of sporadic pedestrian safety fencing along these roads, alongside unattractive pedestrian subways beneath the A682, further weakens environmental quality around the town centre's southern and south-western fringe. The removal of these features would make the pedestrian highway in these areas more expansive and may allow for the introduction of planters or other landscaping to improve the aesthetic quality.

5.55 We observed Rawtenstall town centre to have a generally good sense of safety and security. Bank Street in particular has high levels of pedestrian activity and, for the most part, has active retail frontages that provide natural surveillance within the streets, reducing the opportunities for crime to be committed. There also appear to be council operated CCTV cameras covering much of the town centre's retail core. Natural surveillance weakens somewhat along Bacup Road and the southern part of Bury Road, largely as a consequence of the type of uses occupying the units (i.e. night time economy uses) and the increased level of street level vacancies.

5.56 In summary, during our site visit in December 2016 it was evident that the overall environmental and public realm quality of Rawtenstall town centre was generally good and that there are no acute issues concerning personal safety and security.

Summary – Rawtenstall

5.57 In summary, we consider Rawtenstall to be a healthy centre, which continues to perform a vital role for residents in the Borough as the principal retail and service centre. This is evidenced by:

- The strong level of convenience goods units and floorspace which reflects its role as a traditional market town and key service centre for the Borough;
- A diverse range of independent retailers and a successful indoor and outdoor market which helps to distinguish the town from other competing destinations and is likely to attract visitors from a wider catchment area;
- The below average level of vacancies in the centre (though there is a cluster on Bacup Road which should be addressed)

- The high quality and well maintained environment of the Primary Shopping Area in particular (Bank Street) which is complemented by the centre's various historic buildings and townscape features; and,
- The emerging Spinning Point town centre redevelopment scheme which, as part of its first phase, will bring a larger, more modern bus station closer to Rawtenstall's retail core. The future phases have the potential to deliver a high-quality leisure and/or retail development which will anchor the centre and generate more footfall and spin-off trade for local businesses.

5.58 In terms of Rawtenstall town centre's weaknesses:

- There are a very limited number of national multiples in Rawtenstall's retail core, and such retailers can play an important role as anchors and drivers of footfall. This is in part likely to be down to the relative proximity of larger, higher order centres such as Bury, Rochdale, Burnley and Accrington but is also a consequence of a shortage of larger shopping units. The emerging Spinning Point scheme has the potential to address this through the provision of some modern, more appropriately scaled units.
- Whilst vacancy rates are lower than the national average, their focus on Bacup Road and in the southern third of the town centre boundary more generally is of some cause for concern. Attempts should be made to address this concentration of vacancies through liaison with the owners of the units.
- There are also issues with environmental quality along Bacup Road and at its junction with Bury Road, whilst we witnessed relatively weak levels of pedestrian activity on Bacup Road during our visits. This is partly a consequence of vacancy rates in this area, proximity to a busy road, and also the fact that there are a number of units attributed to the night-time economy which are closed during the daytime. Accordingly, the revitalisation of Bacup Road should be a particular objective for the Council, and with the relocation of the bus station over the Plan Period there is the opportunity for positive intervention.

5.59 Overall, it is evident that Rawtenstall exhibits many of the characteristics of a 'vital' and 'viable' town centre and plays an important role in meeting the needs of local residents and visitors alike. Whilst some weaknesses have been identified, it is envisaged that the delivery of an appropriate mix of uses through the forthcoming Spinning Point town centre redevelopment scheme has the potential to address the majority of these and strengthen further the centre's role and function.

District and Local Centres

5.60 As part of our instruction, we have been asked to consider the current performance of the district centres, local centres, and neighbourhood centres which service the day to day shopping needs of the Borough's population. At present, there are two designated district centres (Haslingden and Bacup), two local centres (Waterfoot and Whitworth), and five neighbourhood centres (Stacksteads, Edenfield, Helmshore, Crawshawbooth, and Shawforth). We provide below an overview of the role and function of each centre, and the composition of uses in each (as ascertained by our surveys of the centres of December 2016). It will be noted that our analysis is not as exhaustive as in the case of Rawtenstall, which is the Borough's principal centre and encompasses considerably more retail and commercial floorspace than any other.

Bacup District Centre

5.61 Bacup district centre is the second largest defined centre in Rossendale and the principal centre serving the east of the Borough, it is located approximately 5.5km east of Rawtenstall town centre. Bacup's retail and commercial units are predominately focussed along two parallel roads (Market Street and St. James Square), with provision, including the centre's outdoor market, also on the interconnecting roads of Tower Street, Union Street and Lee Street. The existing Primary Shopping Area is defined as all units enclosed within the adjoining roads of Market Street, Union Street and St James Square. The district centre includes public amenities such as a Library and free to use Council operated car parking on Rochdale Road (46 spaces), Bank Street (20) and Fern Street (14).

5.62 There have been some significant changes in the retail composition of Bacup district centre since the publication of the last Retail Study in 2009. Most notably, a new Morrisons foodstore of 2,231 sq.m (GIA) / 1,105 sq.m net sales was constructed immediately south of Lee Street (outside the defined centre boundary) in August 2013. Meanwhile, in November 2016 the centre's historic retail anchor, a 851 sq.m (GIA) / 566 sq.m net sales Co-operative foodstore off Irwell Street closed and was converted into a B&M Bargains variety discount store. Two of the centre's three retail banks, Natwest and Barclays on Market Street, have also closed and remain vacant.

5.63 Another significant change since the 2009 Retail Study is the commencement of the Bacup Townscape Heritage Initiative. This is a Heritage Lottery Fund scheme to refurbish historical buildings in Bacup alongside the provision of other townscape and public realm improvements. Phase 1 of the scheme (which was completed in late 2016) involved works to the prominent and historic 'Pioneer Building' on Rochdale Road. This included the installation of new shop fronts, new signage, and the restoration of the building's clock tower. Future phases of the Initiative will involve the replacement of shopfronts along some of the centre's other retail terraces, whilst Lancashire County Council will deliver a public realm improvement scheme for St James Square, with the aim of giving greater priority to pedestrians.

5.64 Table 5.4 on the following page presents the diversity of use in Bacup district centre's defined boundary, based upon our field work of December 2016 and compared with historic information obtained from the 2009 Retail Study. The table shows that whilst the proportion of convenience goods units in the centre is slightly above the national average, the proportion of convenience floorspace is some way below. However, it is important to note that the new Morrisons foodstore has not been accounted for as it falls outside the centre's current boundary. If this 2,231 sq.m was included in our analysis, then the proportion of convenience floorspace would be higher than the national average. The centre benefits from a decent provision of independent convenience retailers including a butcher, baker, grocer and numerous confectioners.

Table 5.4: Bacup District Centre Diversity of Use

Venue	Floorspace			Number of Units			
	Sq.m	% Centre 2016	% UK 2016	Number of Units Centre	% Centre 2016	% Centre 2008	% UK 2016
Convenience	996	8.7%	15.2%	11	9.3%	11.0%	8.7%
Comparison	2,947	25.6%	35.6%	30	25.4%	23.0%	31.7%
Retail Service	1,276	11.1%	6.7%	17	14.4%	16.0%	14.1%
Leisure Service	1,954	17.0%	24.6%	19	16.1%	21.0%	23.5%
Financial Service	816	7.1%	7.9%	10	8.5%	10.0%	10.5%
Vacant	3,519	30.6%	9.2%	31	26.3%	19.0%	11.2%
Total	**11,508**	**100%**	**100%**	**118**	**100%**	**100%**	**100%**

Source: WYG site visit of December 2016.
UK average figure derived from Experian Goad November 2016.
Figures recorded from existing town centre boundary.

5.65 Table 5.4 shows that both the centre's proportion of comparison goods floorspace and units falls below the national average by some 10.0% and 6.3% respectively. However, there has been a marginal increase in the proportion of comparison goods units (by 2%) from the position recorded in 2008, and the offer has also been improved qualitatively through the opening of B&M Bargains on Irwell Street. The lower than average proportion of comparison goods units/floorspace is not particularly surprising given the district centre's more localised role in catering predominantly for day-to-day retail and service needs, as oppose to less frequent trips for clothing, furniture, etc. The vast majority of the comparison goods provision takes the form of small independent operators, although Boots the Chemist does trade from a unit on St. James Square.

5.66 In relation to service uses, the above table highlights that Bacup's proportion of retail service units is broadly in line with the national average (although has reduce by 1.6% since 2008) whilst the proportion of floorspace devoted to retail services is some way above (4.4%). Provision includes 13 hairdressers/salons, three opticians, three travel agents and a Post Office. The strength of the centre's retail service offer is again reflective of its role in meeting the day to day needs of those residing in the east of the Borough.

5.67 Turning to leisure services, provision in Bacup was found to be below the national average in terms of the proportion of both units and floorspace. There are six take-aways in the centre, four public houses and three cafés. The fact that there are no restaurants within the town centre boundary ('Mario's' on Market Street falls outside) suggests that Bacup's evening leisure economy is relatively weak. This seems to be the key reason why both the proportion of floorspace and units are below average levels.

5.68 Financial and professional service provision in Bacup was found to be marginally below the national average in terms of both the proportion of units and floorspace, and had also reduced by 1.5% from the 2008 position. However, from a qualitative perspective, the change has been more marked since publication of the last Retail Study. This is as a consequence of two of Bacup's three retail banks (Natwest and Barclays) having closed, with only a small Santander facility now remaining to serve the centre. Whilst this reduction in provision is to some extent reflective of national trends, the limited competition locally is of concern.

5.69 Finally, Table 5.4 highlights that during our in-centre survey of December 2016, some 26.3% of units were identified to be vacant, equating to 30.6% of the district centre's floorspace. This vacancy rate is considerably higher than the national average for both the proportion of units (11.2%) and floorspace (9.2%), whilst there has also been a 5.3% increase from the position recorded in 2008. These statistics are of concern, as is the fact that total vacant floorspace equates to some 3,500 sq.m and includes a number of large buildings which have been vacant for a considerable period of time (suggesting demand for their re-occupation is limited). Examples include Bacup's former Bingo Hall on Burnley Road, the former 'REAL' building on Yorkshire Street, and the adjacent No. 10 Yorkshire Street. The former Barclays and Natwest Banks on Market Street are other notable examples and, together with the other units referenced, form a particular concentration of vacancies in the north-west of the district centre.

5.70 With regard to Bacup's environmental quality, the centre's public realm is somewhat mixed in that whilst block paving has been used throughout the majority of the district centre's pedestrian footways, this now appears to be relatively 'tired' and in need of replacement or refurbishment. It is understood that a future phase of the Townscape Heritage Initiative will involve the delivery of public realm improvements to St James Square, with the aim of giving greater priority to pedestrians. This will provide a boost to the environmental quality of the Primary Shopping Area in particular.

5.71 The district centre is designated as a Conservation Area and includes a number of listed buildings, accordingly the centre's architectural quality and townscape are generally strong. Whilst poorly maintained shopfronts and vacancies do detract from this, their improvement is a key part of the Townscape Heritage Initiative and as such this issue is likely to be addressed over the plan period. Finally, there was with little evidence of litter or other potential issues such as graffiti and, bearing in mind all of these factors, Bacup's environmental quality can be regarded as generally good.

5.72 In summary, Bacup clearly plays an important role in serving the day-to-day needs of those residing in the east of Rossendale. However, the district centre's current health is considered to be somewhat mixed. Strengths include the recent opening of an anchor foodstore (Morrisons) in an accessible location, which has added a 'main' food shopping offer to the centre and significantly increased the amount of public car parking. B&M has also recently invested in the centre and complements a good independent convenience, comparison and retail service offer. Finally, the Townscape Heritage Initiative is having a positive impact in revitalising the centre's various historic assets, which are a key feature of its environmental quality.

5.73 The centre's key weakness is its vacancy rate, both in terms of the number and amount of floorspace. A key concern is that six of the buildings involved form part of retail terraces, are 19th Century in their construction and appear to have floorplates of 200 sq.m or more. Accordingly, these large buildings are unlikely to be of a format which is suitable for national multiple or independent occupiers and this is evidenced by the lack of demand witnessed to date. Intervention may be required from the Local Authority to facilitate the future re-occupation of these buildings and, indeed, given the historically high vacancy rate of Bacup, it may be advisable to give consideration to permitting conversion to uses other than 'main' town centre uses (such as residential) as evidence would suggest that the stock of floorspace and units in Bacup currently exceeds market demand.

5.74 Overall, it is evident that Bacup does exhibit many of the characteristics of a 'vital' and 'viable' district centre and undoubtedly plays an important role in meeting local retail and service needs. Its position in the local retail hierarchy does not therefore require alteration as part of the forthcoming Local Plan. Whilst Bacup's vacancy rate is undoubtedly a concerning issue, the centre also has a considerable number of qualities. The completion of the Townscape Heritage Initiative over the course of the plan period will clearly have a positive impact on environmental quality and this in turn may promote a favourable shift in the demand for commercial floorspace.

Haslingden

5.75 Haslingden is defined as a district centre and is of a broadly comparable scale to Bacup in terms of both its number of units and quantum of floorspace. It is located approximately 2.6km west of Rawtenstall town centre and serves the day-to-day retail and service needs of those residing in the west of the Borough. Haslingden's 100 or so retail and commercial units are focussed around the vehicular junction of three roads: Deardengate (which runs north to south), Blackburn Road (which runs east to west) and Manchester Road (which also runs east to west).

5.76 The district centre includes public amenities such as a library, health centre, and free to use Council operated car parking. The three largest such facilities are on Dale Street (53 spaces), Hindle Street (50 spaces) and John Street (38 spaces). The existing Primary Shopping Area encompasses the units on the western side of Deardengate, north of its junction with Blackburn Road, and also includes the district centre's outdoor market. Other than changes in representation within Haslingden's existing stock of units, there have been no variations of particular note in the centre's overall quantum of floorspace between 2008 and 2016.

Table 5.5: Haslingden District Centre Diversity of Use

Venue	Floorspace			Number of Units			
	Sq.m	% Centre 2016	% UK 2016	Number of Units Centre	% Centre 2016	% Centre 2008	% UK 2016
Convenience	1,903	18.2%	15.2%	13	12.1%	11.1%	8.7%
Comparison	2,094	20.0%	35.6%	25	23.4%	22.2%	31.7%
Retail Service	1,478	14.1%	6.7%	21	19.6%	15.7%	14.1%
Leisure Service	2,791	26.6%	24.6%	28	26.2%	23.2%	23.5%
Financial Service	837	8.0%	7.9%	9	8.4%	9.3%	10.5%
Vacant	1,379	13.2%	9.2%	11	10.3%	18.5%	11.2%
Total	**10,482**	**100%**	**100%**	**107**	**100%**	**100%**	**100%**

Source: WYG site visit of December 2016.
UK average figure derived from Experian Goad November 2016.

5.77 In terms of Haslingden's diversity of use, Table 5.5 shows that the centre benefits from both a proportion of convenience goods units and floorspace which exceeds the national average by 3.4% and 3.0% respectively. This offer includes two medium-sized foodstores which occupy accessible locations within the district centre boundary, in the form of a Co-operative supermarket (348 sq.m GIA) and Nisa Extra (438 sq.m). Haslingden also benefits from a range of independent convenience retailers including a high-quality butcher/deli, two grocers, three bakers, and two off-licences.

5.78 In a similar vein to Bacup, it is noted that Haslingden's proportion of comparison goods floorspace and units falls well below the national average. In the case of comparison goods units, the centre is some 8.3% below the national average, whilst in terms of floorspace, the centre's provision is currently 15.6% lower than the average figure recorded nationally. The lower than average proportion of comparison goods units/floorspace can be attributed to Haslingden's role in the retail hierarchy as a local service centre, catering predominantly for day-to-day retail and service needs.

5.79 Notwithstanding this, the centre does benefit from a number of independent comparison goods retailers of note, including three quality clothing retailers focussed towards the northern end of the Primary Shopping Area. These units are supplemented by independents stocking antiques, electricals, pet, party and household products, amongst others. National multiple representation is limited to a Hallmark greetings card shop on Deardengate.

5.80 Table 5.5 highlights that Haslingden has a particular strength in the retail service sector, with the proportion of floorspace double the national average and the proportion of units some 5.5% higher. There has also been an increase of some 3.9% from the position recorded in 2008. More than half of the retail service units are hairdressers/salons (11) which is in part reflective of a growth trend witnessed nationally in this sector, but can also be attributed to Haslingden's role in the local retail hierarchy of serving the day-to-day needs of those residing in the west of the Borough.

5.81 In terms of leisure services, in stark contrast to Bacup, both the proportion of floorspace and units in Haslingden was found to be above the national average when we surveyed the centre in December 2016. Indeed, there is evidence that Haslingden has benefitted from the national trend which has seen a growing appetite for food and drink focussed leisure destinations. For example, it is noted that a number of former retail units on Deardengate have been converted to small bars (i.e. Room D and The Live Lounge) over the past 12 months or so. These bars are accompanied by more traditional pubs in the form of The Black Bull and The Commercial Hotel. As such, it can be seen that Haslingden has a relatively strong evening leisure economy given its size and role.

5.82 One negative aspect of Haslingden's relatively strong leisure economy is a proliferation of hot food take-aways at its south-eastern periphery (Manchester Road). Whilst we believe that take-aways such as this can contribute positively to a centre's vitality and viability as part of a wider mix of contrasting uses, in this instance a cluster of five on opposite sides of the road mean that for much of the day-time this part of the centre suffers from a relative lack of activity which undermines its vitality. A total of 13 hot food take aways were counted across the centre as a whole, which was more than twice as many as recorded in Rawtenstall and Bacup, despite their larger size.

5.83 Financial and professional service provision in Haslingden was found to be marginally below the national average in terms of the proportion of units but on a par in terms of floorspace. There has been a reduction of approximately 1% from the 2008 position. Qualitatively however, the change has been more pronounced, with the closure of two of the centre's four high street banks since 2008. Indeed, the closures of NatWest and Barclays mimic identically the position in Bacup, although Haslingden still benefits from Santander and Lloyds TSB fascias and thus maintains a greater degree of competition in this sector than is present in Rossendale's other district centre.

5.84 Finally, in terms of street-level vacancies, Table 5.5 highlights that whilst the proportion of vacant floorspace in Haslingden is marginally above the UK average, the proportion of vacant units is below. Furthermore, the vacancy rate (in terms of units) has reduced by a significant 8.2% since the 2008 survey of the district centre. This is a key indication that the centre's overall health has improved over the past nine years, as is the fact that only one vacancy is currently recorded in the centre's Primary Shopping Area. We would also add that since our fieldwork was undertaken it is understood that 67 Deardengate, one of the largest and most prominent vacancies in the centre, has been let to Domino's Pizza. Accordingly, both the proportion of vacant units and floorspace is now likely to be below the national average, whilst investment by a national multiple is a further indicator of Haslingden's positive growth.

5.85 With regards other health check indicators, Haslingden's environmental quality is considered to be generally good. For example, the northern end of Deardengate benefits from a stone cobble finish to the vehicular highway which offers the surrounding retail and leisure units an attractive setting, as well as promoting pedestrian usage. The public realm throughout the town centre also benefits from block paving (brickwork) which was mostly in good condition, although some areas were identified as requiring replacement or refurbishment. Whilst Haslingden district centre is not designated as a Conservation Area, it still benefits from a number of period buildings along Deardengate in particular and as such the centre's architectural quality and townscape are relatively strong. The centre's market, whilst relatively small, is also of a good aesthetic quality incorporating stone buildings and ornate metal railings to Blackburn Road. The market facility is well maintained. Finally, there was little evidence of litter or other potential issues such as graffiti. Given this, we can conclude that Haslingden's environmental quality is relatively strong.

5.86 In summary, our observations suggest that Haslingden is successfully fulfilling the role of a district centre in the local retail hierarchy by adequately serving the day-to-day needs of those residing in the west of the Borough. The centre's strengths include a vacancy rate which is below the national average and has improved significantly (reducing by 8%) since the centre survey undertaken to inform the 2009 Retail Study. The centre also has a strong convenience goods offer, with two medium sized foodstores and a host of good quality independent traders, including butcher, bakers and grocers. Haslingden's night time leisure economy was found to be performing better than anticipated, with several bars, pubs and a restaurant present. Finally, the centre's environmental quality is considered to be generally good.

5.87 Centre's weaknesses include a relatively limited comparison goods offer, with a proportion of floorspace and units well below the national average, and also a financial services sector which has witnessed the loss of two high street banks since the last Retail Study. However, the key issue identified is the proliferation of hot food take-aways towards the centre's south eastern periphery, with the concentration of these uses resulting is a lack of vitality in this part of the centre during the daytime. The 13 take-aways identified was also the highest of any defined centre in the Borough.

5.88 Overall, having shown significant improvements since the time of the last Retail Study, Haslingden undoubtedly retains the characteristics of a 'vital' and 'viable' district centre and continues the perform an important role in meeting local retail and service needs. In our view its position in the local retail hierarchy does not therefore require any alteration as part of the forthcoming Local Plan.

Waterfoot

5.89 Waterfoot is presently the larger of Rossendale's two defined local centres and at approximately 7,800 sq.m (73 units) is in the order of 2,500 sq.m (or 30 units) smaller than Haslingden. It is located approximately 2.6km south-east of Rawtenstall town centre and serves a catchment focussed on the residential areas of Waterfoot, Newchurch and Cloughfold. The centre is broadly linear in shape with its offer focussed along two adjoining roads; Bacup Road (which runs east to west) and Burnley Road East (which runs north from Bacup Road). It benefits from a relatively substantial amount of free to use Council operated car parking (130 spaces), with the three largest facilities on Bacup Road (34 spaces), Spring Garden Street (30 spaces), and Mill Barn Lane (25 spaces).

5.90 In terms of the centre's diversity of use, Table 5.6 on the following page shows that Waterfoot's key strength is its convenience goods offer, which is some 5% above the national average (in terms of the proportion of units). The centre's anchor convenience goods unit is a Co-operative foodstore of 548 sq.m (GIA) / 334 sq.m (net), whist it also benefits from a considerable independent offer comprising three butchers, two bakers, two grocers, and numerous confectioners. The strong showing in this sector is considered to be reflective of Waterfoot's role as local centre serving predominantly 'top-up' food shopping and other day-to-day needs.

Table 5.6: Waterfoot Local Centre Diversity of Use

Venue	Floorspace			Number of Units			
	Sq.m	% Centre 2016	% UK 2016	Number of Units Centre	% Centre 2016	% Centre 2008	% UK 2016
Convenience	1,084	13.9%	15.2%	10	13.7%	15.4%	8.7%
Comparison	1,263	16.2%	35.6%	12	16.4%	15.4%	31.7%
Retail Service	1,130	14.5%	6.7%	15	20.5%	21.2%	14.1%
Leisure Service	2,264	29.1%	24.6%	16	21.9%	21.1%	23.5%
Financial Service	528	6.8%	7.9%	4	5.5%	5.8%	10.5%
Vacant	1,515	19.5%	9.2%	16	21.9%	21.1%	11.2%
Total	**7,784**	**100%**	**100%**	**73**	**100%**	**100%**	**100%**

Source: WYG site visit of December 2016.
UK average figure derived from Experian Goad November 2016.
Figures recorded from existing town centre boundary.

5.91 Table 5.6 also highlights that Waterfoot benefits from a considerable number of retail service uses, which surpasses the national average in terms of the proportion of both floorspace and units. The offer identified (15 units in total) includes 10 salons/hairdressers and a Post Office. Again, these findings are indicative of a centre which is focussed upon catering for local, day-to-day retail service needs.

5.92 In terms of Waterfoot's leisure service offer, it is notable that it unusually benefits from the presence of two theatres. These being the Horse & Bamboo Theatre on Bacup Road and the New Millenium Theatre on Burnley Road East. Whilst these leisure uses represent significant attractions, with catchments over and above that of the local centre, they do not appear to support complementary evening economy uses, with only one public house and no restaurants identified within the Waterfoot. It is also noted that a large former public house stands vacant on Bacup Road.

5.93 We identified a considerable number of hot food take-aways during our field work, with a total of nine spread throughout the centre. As already highlighted in this report, whilst take-aways can contribute positively to a centre's vitality and viability as part of a wider mix of contrasting uses, a concentration can undermine vitality given that such uses are largely closed during the daytime. This problem arises in parts of Waterfoot, for example Victoria

Parade (the corner building at the junction of Bacup Road and Bury Road East) includes three take-aways in quick succession fronting Bury Road East. In combination with three existing vacant units in this parade, this stretch of six frontages appeared largely 'dead' when we visited the centre during the daytime, offering a poor impression of this prominent part of the centre.

5.94 Waterfoot's vacancy rate is also of some cause for concern. Table 5.6 shows that both the proportion of vacant floorspace and units is in the order of double the national average. Furthermore, the table shows that this high vacancy rate is now a longstanding trend, with over 21% of units lying vacant in both 2008 and 2016. A particular concentration of vacancies is noted at the junction of Bacup Road and Bury Road East, with five identified in Victoria Parade. This Grade II listed building has the potential to be a landmark feature of Waterfoot but presently offers a relatively poor impression to those approaching the centre from the east or west. The Council should seek to address this where possible through the type of shopfront improvements which are having a positive impact in Bacup district centre (i.e. Bacup Townscape Heritage Initiative) and its listed buildings.

5.95 In terms of other health check indicators of note, the centre's length meant that pedestrian flows were not particularly strong at the times of our visits, however, the lack of vacancies towards the northern end of Burnley Road East suggests that these shops are well used. Environmental quality in the centre was mixed in our view. Whilst block paving was present along pedestrian routes throughout, it appeared somewhat 'tired' and in need of replacement. The centre's general architectural and townscape qualities are good, and it has already been highlighted that the canopied, Grade II listed Victoria Parade has the potential to be a landmark feature – if the appearance of its shop frontages could be improved and its vacancy rate reduced.

5.96 In summary, Waterfoot's strong convenience and retail service offers provide clear evidence that it is successfully performing its role as a 'local centre' serving the day-to-day needs of a relatively localised catchment. The proliferation of hot-food take-aways, a longstanding elevated vacancy rate, and the need for shopfront improvements have been identified as current weaknesses. With regard vacancies in particular, the Local Planning Authority may need to accept that the quantum of floorspace currently available will never be met by future demand, given wider changes in retailing trends. Accordingly, consideration may need to be given to the managed change of some units which have historically accommodated 'main town centre' uses to alternative uses such as residential dwellings.

5.97 Based on the above analysis, we consider that Waterfoot should, at the very least, retain its role as a 'local centre' in any forthcoming Local Plan. However, given that it is of a considerably larger size than Rossendale's other defined local centre (i.e. Whitworth), the Local Planning Authority may wish to consider classifying Waterfoot as a 'large local centre' in recognition of its position somewhere between the Borough's district and local centres in terms of role and function.

Whitworth

5.98 Whitworth is defined as a local centre in the Core Strategy and is located some 9km south east of Rawtenstall town centre. Whitworth serves the Whitworth Valley, encompassing the residential areas of Whitworth, Shawforth and Facit. With just 25 units within its defined boundary (as delineated in the Core Strategy) Whitworth is broadly only one third of the size of Waterfoot and is therefore of a considerably smaller scale, despite its equivalent standing in the local retail hierarchy.

5.99 The centre is linear in shape with its offer focussed primarily along Market Street. There are various community facilities within and surrounding the centre; including a medical centre at its heart, the local library immediately south west, and the settlement's leisure centre a short distance north. Whitworth benefits from a substantial amount of free to use Council operated car parking for its size (approximately 80 spaces), with the largest facility located centrally on North Street (32 spaces).

5.100 As Table 5.7 on the following page highlights, the vast majority of Waterfoot's floorspace is accounted for by convenience retailers. There are two small supermarkets serving the centre which include a Co-operative store of 529 sq.m (GIA) / 392 sq.m net sales and a Tesco Express of 278 sq.m (GIA) / 213 sq.m net sales. The introduction of the Tesco store represents the main change in the centre's composition since the preparation of the Council's 2009 Retail Study. There is no real independent convenience retail offer in Whitworth and the presence of two national multiples in close proximity could account for this. Notwithstanding this, the Tesco and Co-operative stores are considered to play an import role in meeting day-to-day 'top-up' food shopping needs across the Whitworth Valley and without such provision residents would face a considerable journey to either Bacup or Rochdale.

Table 5.7: Whitworth Local Centre Diversity of Use

Venue	Floorspace			Number of Units			
	Sq.m	% Centre 2016	% UK 2016	Number of Units Centre	% Centre 2016	% Centre 2008	% UK 2016
Convenience	1,297	44.9%	15.2%	3	12.0%	11.8%	8.7%
Comparison	219	7.6%	35.6%	4	16.0%	23.5%	31.7%
Retail Service	414	14.3%	6.7%	8	32.0%	29.4%	14.1%
Leisure Service	759	26.3%	24.6%	7	28.0%	29.4%	23.5%
Financial Service	71	2.5%	7.9%	1	4.0%	0.0%	10.5%
Vacant	127	4.4%	9.2%	2	8.0%	5.9%	11.2%
Total	**2,887**	**100%**	**100%**	**25**	**100%**	**100%**	**100%**

Source: WYG site visit of December 2016.
UK average figure derived from Experian Goad November 2016.
Figures recorded from existing town centre boundary.

5.101 The local centre's wider mix of uses is considered to be fairly typical of a centre of this role and function. There are a variety of retail service uses, including a number of hairdressers, a beautician, dry cleaners, and dog grooming parlour. Leisure services are also apparent and include two pubs, two take-aways, a café and a restaurant. The centre's comparison goods and financial services offer is more limited, although this is to be expected given its localised function.

5.102 Significantly, Table 5.7 highlights that Whitworth's vacancy rate is below the national average in terms of both the proportion of units and floorspace. Furthermore, the data from 2008 highlights that the low vacancy rate recorded in 2016 is reflective of a longstanding trend. This represents an important indication that Whitworth has historically performed well and continues to do so.

5.103 In summary, given its strong convenience goods provision, wider retail and leisure service offer, and low vacancy rate, we conclude that Whitworth is a vital and viable centre which is successfully meeting the day-to-day needs of the surrounding valley. Accordingly, we would advise that Whitworth continues its role as a 'local centre' as part of the forthcoming Local Plan.

Crawshawbooth

5.104 Crawshawbooth is currently defined as a 'neighbourhood centre', although it is noted that such centres have no standing in national policy (which recognises only town, district and local centres). It is located 2km north of Rawtenstall town centre and serves the villages of Crawshawbooth, Goodshaw, Love Clough, Dunnockshaw and Clow Bridge, as well as other surrounding rural hinterlands. Crawshawbooth is a linear centre and comprises a broadly equivalent quantum of floorspace to Whitworth. Indeed, it actually benefits from a greater number of units, despite currently sitting below it in the Authority's established retail hierarchy.

Table 5.8: Crawshawbooth Diversity of Use

Venue	Floorspace			Number of Units			
	Sq.m	% Centre 2016	% UK 2016	Number of Units Centre	% Centre 2016	% Centre 2008	% UK 2016
Convenience	570	21.6%	15.2%	6	18.2%	16.7%	8.7%
Comparison	412	15.6%	35.6%	7	21.2%	23.3%	31.7%
Retail Service	457	17.3%	6.7%	8	24.2%	30.0%	14.1%
Leisure Service	667	25.3%	24.6%	7	21.2%	16.6%	23.5%
Financial Service	339	12.9%	7.9%	2	6.1%	0.0%	10.5%
Vacant	191	7.2%	9.2%	3	9.1%	13.3%	11.2%
Total	**2,636**	**100%**	**100%**	**33**	**100%**	**100%**	**100%**

Source: WYG site visit of December 2016.
UK average figure derived from Experian Goad November 2016.
Figures recorded from existing town centre boundary.

5.105 In terms of its diversity of uses, as Table 5.8 on the following page demonstrates, Crawshawbooth benefits from a good balance of uses which are well placed to meet the day-to-day needs of a local catchment population. For example, in terms of convenience goods provision, the centre contains two small convenience stores, three bakers, and a quality butcher/deli. There is also a good range of comparison goods retailers including two clothes shops, two jewellers, and a pharmacy. Meanwhile, the centre's service sector also appears strong and includes six hairdressers/salons, a travel agent, two cafes, three take-aways, a public house, and a restaurant. Finally, the centre's vacancy rate was found to be below the national average in terms of both the proportion of units and floorspace, whilst the data from 2008 suggests that vacancies have reduced over the past eight years.

5.106 In summary, Crawshawbooth can be regarded as a vital and viable centre which is well equipped in terms of its retail and service offer to serve the day-to-day needs of a surrounding, relatively localised catchment area. It has also been highlighted that it actually benefits from a slightly higher number of units than Whitworth, despite this centre being positioned above it in the local retail hierarchy. Finally, Crawshawbooth's low vacancy rate, which has improved since 2008, suggests an upturn in the centre's performance in recent years. Given these factors, we would advise that consideration is given by the Local Planning Authority to elevating Crawshawbooth within the local retail hierarchy to the position of 'local centre'. In addition to its important role in the north of the Borough, the centre is also of broadly equivalent size to Whitworth. As such, it would be logical for the two centres to have an equivalent standing in Rossendale's retail hierarchy.

Edenfield

5.107 Edenfield is defined as a 'neighbourhood centre' in the Core Strategy and serves the settlement of the same name. It is located 4km south of Rawtenstall town centre and comprises 13 units which stretch north along Bury Road from its junction with Bury Road North. As Table 5.9 highlights, Edenfield benefits from a range of uses across its limited number of shop units. This includes a butcher, baker, pharmacy, café, public house, two take-aways, and three salons.

Table 5.9: Edenfield Diversity of Use

Venue	Floorspace			Number of Units			
	Sq.m	% Centre 2016	% UK 2016	Number of Units Centre	% Centre 2016	% Centre 2008	% UK 2016
Convenience	119	11.9%	15.2%	2	15.4%	27.3%	8.7%
Comparison	49	4.9%	35.6%	1	7.7%	18.2%	31.7%
Retail Service	233	23.3%	6.7%	3	23.1%	0.0%	14.1%
Leisure Service	393	39.3%	24.6%	4	30.8%	27.3%	23.5%
Financial Service	155	15.5%	7.9%	2	15.4%	0.0%	10.5%
Vacant	52	5.2%	9.2%	1	7.7%	27.3%	11.2%
Total	**1,001**	**100%**	**100%**	**13**	**100%**	**100%**	**100%**

Source: WYG site visit of December 2016.
UK average figure derived from Experian Goad November 2016.
Figures recorded from existing town centre boundary.

5.108 Only one vacancy was recorded in the centre during our visit and this position had improved considerably from the in-centre survey of 2008. We also noted that a terrace of units at 38-42 Market Street had been recently refurbished and was now fully let. This indicates investor confidence in the centre and adds to our overall impression that Edenfield is currently performing viably.

5.109 In summary, Edenfield is clearly successful in meeting the day-to-day needs of its local catchment population, with an appropriate range of uses provided across a limited number of shop units. However, given its modest scale and very localised catchment, we do not regard Edenfield as meeting the criteria of a 'local centre'. In our view, its role is commensurate with that of a 'neighbourhood parade'. Whilst such centres do not have any formal standing in national town centre policy, it is appropriate for the Local Planning Authority to support the continued vitality and viability of Edenfield, alongside the Borough's other neighbourhood parades, given their role in serving surrounding local communities.

Helmshore

5.110 Helmshore serves the residential settlement of the same name and its surrounding hinterlands. It is 2.5km south-west of Rawtenstall town centre and 1km south of Haslingden. Whilst Helmshore is defined as a 'neighbourhood centre' in the Core Strategy, our observations are that it actually comprises three separate shopping parades of between two and six units and therefore cannot be regarded as a 'centre' in its own right. Notwithstanding this, each of the parades appears to be performing well, with no vacancies recorded and local provision which includes four convenience stores, two take-aways, a grocer, pharmacy, café, newsagent, salon and bar/restaurant, amongst others. This is highlighted in Table 5.10 on the following page.

5.111 Overall, the three groups of units identified are evidently vital and viable and adequately meet the day-to-day needs of the surrounding localised catchment population. In our view, the local planning authority should regard 'Helmshore' as three separate 'neighbourhood parades'. Whilst these parades would not have any formal standing in the local retail hierarchy, it would be appropriate for the Local Planning Authority to support their continued vitality and viability such that the important role they play in the community is maintained.

Table 5.10: Helmshore Diversity of Use

Venue	Floorspace			Number of Units			
	Sq.m	% Centre 2016	% UK 2016	Number of Units Centre	% Centre 2016	% Centre 2008	% UK 2016
Convenience	638	57.5%	15.2%	6	46.2%	25.0%	8.7%
Comparison	67	6.0%	35.6%	1	7.7%	8.3%	31.7%
Retail Service	221	19.9%	6.7%	3	23.1%	33.3%	14.1%
Leisure Service	183	16.5%	24.6%	3	23.1%	16.7%	23.5%
Financial Service	0	0.0%	7.9%	0	0.0%	8.3%	10.5%
Vacant	0	0.0%	9.2%	0	0.0%	8.3%	11.2%
Total	**1,109**	**100%**	**100%**	**13**	**100%**	**100%**	**100%**

Source: WYG site visit of December 2016.
UK average figure derived from Experian Goad November 2016.
Figures recorded from existing town centre boundary.

Stacksteads

5.112 Stacksteads is a long linear centre which stretches some 800m along Newchurch Road (A681) between its junction with Mark Street to the west and Fernhill Drive to the east. It is located some 4km east of Rawtenstall town centre but much closer (1.7km) to Waterfoot. The centre, which was classified as a 'neighbourhood centre' in the Core Strategy, comprises 32 units, although in a similar vein to Helmshore we would question whether these uses function together or in a series of groups which are separated by other uses (predominantly residential terraces).

5.113 In terms of the centre's strengths, this appears to be its convenience retail and service sectors. Stacksteads as a whole benefits from three convenience stores, two bakers, a butcher, confectioner, and off-licence. Meanwhile, its service uses comprise four take-aways, three hairdressers/salons, two pubs and a café. Occupying a central location within the centre is also a large public car park, which provides some 69 spaces and evidently aids the centre in attracting a degree of pass-by vehicular trade from those using the A681.

5.114 Stacksteads' key weakness is its number of street level vacancies, which as Table 5.11 highlights, accounts for nearly one third of all of the units within the centre. It is noted that a number of these vacancies are clustered together in peripheral locations, suggesting that there is simply no longer the footfall in some parts of this lengthy centre to sustain the number of retail and leisure uses that it has historically accommodated. The table shows that vacancy rates have increased in the order of 10% over the past eight years (from an already elevated position), suggesting that this is a trend which will continue in the future. In our view, the most appropriate strategy for the Local Authority would be to manage the decline of Stacksteads' weaker peripheral terraces and adopt a positive approach to planning applications which seek to change the use of longstanding vacant retail/commercial units to alternative appropriate uses, such as residential dwellings.

Table 5.11: Stacksteads Diversity of Use

Venue	Floorspace			Number of Units			
	Sq.m	% Centre 2016	% UK 2016	Number of Units Centre	% Centre 2016	% Centre 2008	% UK 2016
Convenience	549	13.3%	15.2%	8	25.0%	16.2%	8.7%
Comparison	1,613	39.1%	35.6%	4	12.5%	13.5%	31.7%
Retail Service	186	4.5%	6.7%	3	9.4%	16.2%	14.1%
Leisure Service	1,066	25.9%	24.6%	8	25.0%	24.3%	23.5%
Financial Service	0	0.0%	7.9%	0	0.0%	10.8%	10.5%
Vacant	709	17.2%	9.2%	9	28.1%	18.9%	11.2%
Total	**4,123**	**100%**	**100%**	**32**	**100%**	**100%**	**100%**

Source: WYG site visit of December 2016.
UK average figure derived from Experian Goad November 2016.
Figures recorded from existing town centre boundary.

5.115 In summary, some of the terraces of retail and leisure units identified as part of Stacksteads neighbourhood centre evidently perform viably and meet the day-to-day needs of a surrounding, relatively localised, catchment population. Other terraces no longer perform this role and we recommend that consideration be given as to whether alternative (e.g. residential) uses can be found for these commercial units. This could help focus footfall into the parts of the centre which operate viably. In terms of Stacksteads' future definition, the local planning authority should, in our view, regard it as a series of separate 'neighbourhood parades'. Whilst these parades would not have any formal standing in the local retail hierarchy, the Local Planning Authority should support their continued vitality and viability such that their important role in the community is maintained.

Facit

5.116 Our on-street survey identified a number of small terraces of retail units within the Whitworth Valley. The parade identified in Facit, some 0.5km north of Whitworth local centre, was considered to be one of the larger groupings of units, although this was not referenced in the 2011 Core Strategy as forming a 'neighbourhood centre'. Table 5.12 highlights that the centre's offer is focussed on the convenience and service retail sectors, with a butcher, baker, public house, restaurant and take-aways identified. Vacancy rates were found to be high and this is likely to be reflective of Facit's proximity to Whitworth local centre, which benefits from a historically superior offer.

Table 5.12: Facit Diversity of Use

Venue	Floorspace			Number of Units			
	Sq.m	% Centre 2016	% UK 2016	Number of Units Centre	% Centre 2016	% Centre 2008	% UK 2016
Convenience	197	9.7%	15.2%	3	23.1%	23.1%	8.7%
Comparison	181	8.9%	35.6%	1	7.7%	15.4%	31.7%
Retail Service	63	3.1%	6.7%	1	7.7%	7.7%	14.1%
Leisure Service	1,221	60.2%	24.6%	4	30.8%	30.8%	23.5%
Financial Service	0	0.0%	7.9%	0	0.0%	0.0%	10.5%
Vacant	366	18.0%	9.2%	4	30.8%	23.1%	11.2%
Total	**2,028**	**100%**	**100%**	**13**	**100%**	**100%**	**100%**

Source: WYG site visit of December 2016.
UK average figure derived from Experian Goad November 2016.
Figures recorded from existing town centre boundary.

5.117 Facit is successful to some degree in meeting the day-to-day needs of a localised catchment, with an adequate range of uses provided across a limited number of units. However, given its modest scale, we do not regard Facit as meeting the criteria of a 'local centre'. In our view its role is commensurate with that of a 'neighbourhood parade'. Whilst such centres do not have any formal standing in policy, the Local Planning Authority should support their continued vitality and viability given their important role in the community.

6.0 Population and Expenditure

6.1 This section of the report assesses the current population and available expenditure (for both convenience and comparison goods) within the Study Area.

Study Area Population

6.2 The base population within each study zone at 2016 has been calculated using Experian Micromarketer G3 data (2015 estimate, which was issued in November 2016). Experian's baseline population data estimates take into consideration the findings of the 2011 Census release. Baseline population estimations are then projected forward by Experian to the end of the study period (2034) using growth rates derived from Office for National Statistics based population projections (sub-national population projections) which take account of age, gender and socio-economic factors.

6.3 It is important to emphasise that whilst the Study Area spans Rossendale Borough's administrative area it also includes land which falls within Hyndburn to the north and Bury to the south. In the case of Bury, this is because the settlement of Ramsbottom lies adjacent to the Rossendale authority area (specifically the village of Edenfield) and there are therefore likely to be flows of trade both north and south of the border. The same can be said at the north-western corner of the Study Area, where the northern extremity of Haslingden merges with the southern periphery of Accrington. Accordingly, reference made to the Study Area's total population should not be taken to mean the total population of Rossendale Borough, which would obviously be somewhat smaller.

6.4 By applying the methodology set out above, Table 6.1 on the following page provides our estimate of future population growth across the Study Area. It shows that in 2017 the Study Area comprises a total population of some 97,409 people. By the start of the plan period (2019) this population is anticipated to have risen to 98,396 people, equating to growth of 1.0% or 987 people. By 2024 it will have exceeded 100,000 people (100,658), equating to growth of 3.3% from the 2017 position, and by 2029 it will have reached 102,288 people (growth of 4,879 people or 5.0% from 2017). Finally, at the end of the plan period in 2034, the Study Area's population is anticipated to reach 103,737 which would represent growth of some 6,328 people (or 6.5%) from the starting position of 2017.

Table 6.1: Population Growth – Study Area Population by Study Zone (2017 to 2034)

Zone	2017	2019	2014	2029	2034
1	21,920	22,069	22,442	22,692	22,966
2	28,525	28,850	29,501	29,972	30,356
3	23,955	24,237	24,927	25,386	25,823
4	23,009	23,240	23,788	24,238	24,592
Total	**97,409**	**98,396**	**100,658**	**102,288**	**103,737**

Retail Expenditure

6.5 In order to calculate per capita convenience and comparison goods expenditure, we have again utilised Experian Micromarketer G3 data which provides detailed information on local consumer expenditure and takes into consideration the socio-economic characteristics of the local population. Experian is a widely accepted source of expenditure and population data and is regularly used by WYG in calculating retail capacity. The base year (or 'price base') for the Experian expenditure data is 2015. Per capita growth forecasts have been derived from Experian Retail Planner Briefing Note 14 (Figure 1a, Page 11), which was published in November 2016. For the purposes of this Study, the following annual growth forecasts set out below by Table 6.2 have been applied.

Table 6.2: Convenience and Comparison Goods Expenditure Growth Rates (2016 to 2034)

Year	Convenience (%)	Comparison (%)
2016	0.0	3.3
2017	-0.2	1.4
2018	-0.9	1.0
2019	0.0	3.0
2020	0.0	3.0
2021	0.0	3.0
2022	0.0	3.0
2023	0.0	3.0
2024	0.1	3.2
2025	0.1	3.2
2026	0.1	3.2
2027	0.1	3.2
2028	0.1	3.2
2029	0.1	3.2
2030	0.1	3.2
2031	0.1	3.2
2032	0.1	3.2
2033	0.1	3.2
2034	0.1	3.2

6.6 The latest growth forecasts suggest that the recovery from the downturn in the economy witnessed at the start of the decade is underway, albeit growth in convenience goods expenditure is unlikely to see any sign of improvement over the short to medium term. For example, Experian forecasts no annual growth in convenience goods expenditure between 2015 and 2016 and negative growth of -0.2% and -0.9% in 2017 and 2018 respectively. This can in part be attributed to the economic uncertainty which is anticipated when the United Kingdom withdraws from the EU. Between 2019 and 2023 Experian forecasts a further period of no growth in convenience goods expenditure; however, over the 10 years from 2024 to 2034, a modest annual increase of +0.1% per annum is predicted to return.

6.7 By contrast, Experian identifies an immediate and relatively strong annual comparison expenditure growth rate of +3.3% at 2016. A drop in the rate of growth is anticipated during 2017 and 2018 to +1.4% and +1.0% respectively, to reflect the uncertainty surrounding Brexit. However, comparison goods growth rates thereafter are forecast to be extremely stable, with a +3.0% per annum increase anticipated between 2019 and 2023, and growth of +3.2% per annum forecast over the 10 year period 2024 to 2034.

6.8 Speaking generally, the higher anticipated growth in the comparison goods sector when compared to the convenience goods sector is a consequence of the fact that the UK populace has (on average) historically devoted more of their available expenditure to non-food purchases than they have food purchases. This is reflective of the fact that there is a limit to the amount of food that each person needs, thus additional expenditure will typically be spent on non-food items. An additional, more recent trend of relevance is the fact that following the recession of the late 2000s, the UK population has been far more cautious with regards the amount of expenditure that they are willing to devote to food purchases (which is forecast to reduce year-on-year until at least 2020), leading to the rise of 'discount foodstores' in which the average cost of items is less than in 'mainstream' foodstores.

6.9 It should also be noted that expenditure growth forecasts in the longer term (beyond the next ten years) should be treated with some caution given the inherent uncertainties in predicting the economy's performance over time. Assessments of this nature should therefore be reviewed on a regular basis in order to ensure that forecasts over the medium and long term are reflective of any changes to relevant available data.

6.10 Experian Retail Planner Briefing Note 14 also provides a forecast as to the proportion of expenditure which will be committed through special forms of trading (comprising 'non-store retailing', such as internet sales, TV shopping and so on) over the reporting period. The Study excludes any expenditure that survey respondents indicated was committed via special forms of trading and instead makes an allowance derived from Experian's recommendation in Retail Planner Briefing Note 14.

6.11 In considering special forms of trading, it should be noted that many products which are ordered online are actually sourced from a physical store's shelves or stockroom (particularly in the case of convenience goods). Accordingly, expenditure committed in this manner acts to support stores and should be considered 'available' to tangible retail destinations.

6.12 In order not to overstate the influence of expenditure committed via special forms of trading, the approach taken is based on Experian's 'adjusted' figure (provided at Appendix 3 of its Retail Planner Briefing Note 14) which makes an allowance for internet sales which are sourced from stores. The proportion of expenditure committed through special forms of trading cited below at Table 6.3 is excluded from the per capita retail expenditure forecasts for each Study Zone as sourced from Experian Micromarketer G3 data as it is not available to stores within the Study Area.

Table 6.3: Special Forms of Trading Forecasts (2017 to 2034)

Year	Convenience (%)	Comparison (%)
2017	3.2	13.8
2019	3.6	14.8
2024	4.4	16.0
2029	4.9	16.2
2034	5.2	16.5

6.13 Table 6.3 indicates that growth in comparison goods expenditure committed via special forms of trading will slow across the second half of the plan period, increasing by just 0.5% between 2024 and 2034. However, prior to this there will be an increase of 2.2 percentage points over the seven years between 2017 and 2024. Conversely, the proportion of special forms of trading on convenience goods is forecast to grow steadily over the Study period to 2034, but with an overall lower increase of just 2.0 percentage points between 2017 and 2034.

6.14 By applying the above growth rates and allowances for special forms of trading to the per capita convenience and comparison retail expenditure data for each Study Zone and utilising the population forecasts for each zone, it is possible to produce expenditure estimates for each survey zone at 2017, 2019, 2024, 2029 and 2034. In doing so, the assessment takes into account both per capita retail expenditure growth and population change.

Convenience Goods Expenditure

6.15 Taking into consideration the above forecast changes in population and per capita expenditure, it is estimated that, at 2017, the resident population of the Study Area generates some £202.2m of convenience goods expenditure (expressed in 2015 prices, as is every subsequent monetary value). Available convenience goods expenditure is then forecast to decrease marginally (by £0.6m) to £201.5m at 2019, as a consequence of the anticipated negative growth in such expenditure over this period. However, over the 15-year Local Plan period 2019 to 2034 convenience goods expenditure within the Study Area is forecast to increase from £201.5m to £211.3m. This represents an uplift of £9.7m (or 4.8%) and incorporates both population and income growth. The anticipated changes in total convenience goods expenditure and growth in the Study Area are set out in Table 6.4 below.

Table 6.4: Total Available Study Area Expenditure – Convenience Goods (£m)

2017 (£m)	2019 (£m)	2024 (£m)	2029 (£m)	2034 (£m)	Growth 2017-2019 (£m)	Growth 2017-2024 (£m)	Growth 2017-2029 (£m)	Growth 2017-2034 (£m)
202.2	201.5	204.7	208.0	211.3	-0.6	2.5	5.8	9.1

Main Food and 'Top-up' Shopping

6.16 The proportion of convenience goods expenditure which is committed through main food shopping trips and through 'top-up' shopping trips has been estimated with reference to respondents' answers to Question 19 and Question 20 of the household survey, which ask respondents to estimate their weekly main food shopping expenditure and weekly top-up shopping expenditure respectively. We have analysed responses to these questions to derive an estimate of the split between main and top-up expenditure on a zonal basis.

6.17 Across the whole of the Study Area, we calculate (by adding together our estimates of the monetary split between main and top up shopping expenditure within each zone) that the proportion of convenience goods expenditure directed to respondents' main food shopping destination equates to 78.8% of their overall convenience shopping expenditure. The remaining 21.2% of expenditure (which will typically be spent on regular purchases such as milk, bread and so on) is therefore attributed to the respondents' top-up convenience shopping destination. Our estimate of the split between these two types of expenditure on a zonal basis is provided below at Table 6.5.

Table 6.5: Split of Convenience Goods Expenditure Between Main and Top-up Shopping

Zone	Main Food Shopping (%)	Top-up Food Shopping (%)
1	79.7	20.3
2	76.9	23.1
3	80.8	19.2
4	77.9	22.1
Total	**78.8**	**21.2**

6.18 By applying these estimates to the identified resident population of the Study Area, convenience goods expenditure at 2017 committed through 'main food' shopping trips is estimated to be £159.0m and through 'top up' shopping trips is estimated to be £43.1m.

Comparison Goods Expenditure

6.19 For comparison goods, Table 6.6 sets out the estimation that the resident population of the Study Area will generate some £284.2m of comparison goods expenditure at 2017. Available comparison goods expenditure is then forecast to increase to £295.2m at 2019, before growing to £485.5m in 2034 at the end of the plan period. This represents an uplift of £190.3m (or 64.5%) over the lifetime of the 15-year Local Plan (2019 to 2034) and incorporates both population and income growth. The increase is driven primarily by the population growth projections across the Study Area, in addition to relatively strong comparison goods expenditure growth forecast over the forthcoming years.

Table 6.6: Total Available Study Area Expenditure – Comparison Goods (£m)

2017 (£m)	2019 (£m)	2024 (£m)	2029 (£m)	2034 (£m)	Growth 2017-2019 (£m)	Growth 2017-2024 (£m)	Growth 2017-2029 (£m)	Growth 2017-2034 (£m)
284.2	295.2	345.8	410.4	485.5	11.0	61.6	126.2	201.3

6.20 For the purposes of this Study, comparison goods expenditure has been divided into seven sub-categories: 'clothing and footwear', 'books, CDs, DVDs, toys and jewellery', 'small household goods', 'chemist goods', 'electrical goods', 'furniture', and 'DIY goods'. The proportion of expenditure directed to each of the seven sub-categories is estimated by Experian on a zonal basis.

6.21 In considering the above, it should be noted that if an excess of expenditure manifests itself within the Study Area, this does not necessarily translate directly into a requirement for additional floorspace. In assessing quantitative need, it is also necessary to take account of:

- Existing development proposals;
- Expected changes in shopping patterns; and,
- The future efficiency of retail floorspace.

7.0 Retail Needs in Rossendale

7.1 WYG has examined the need for new convenience and comparison goods floorspace over five year reporting periods from 2019 to 2034, whilst 2017 has been adopted as a base year for the quantitative assessment (i.e. 2017, 2019, 2024, 2029 and 2034). This is to coincide with the lifespan of the forthcoming Rossendale Local Plan. At the outset, it is important to note that an assessment in the long-term should be viewed with caution, due to the obvious difficulties inherent in predicting the performance of the economy and shopping habits over time. In any event, any identified capacity should not necessarily be viewed as justification of new retail floorspace outside of centres as this could prejudice the implementation of any emerging town centre redevelopment strategies and the development of more central sites which may be currently available or which could become available over time.

7.2 Set out below is an overview of the methodology employed to assess retail capacity. The capacity for future convenience and comparison retail floorspace across the Rossendale administrative area as a whole is then assessed, followed by assessments of the capacity for additional facilities within each of the Borough's town and district centres (i.e. Rawtenstall, Haslingden and Bacup).

7.3 A complete series of quantitative capacity tables are set out at Appendix 4 (convenience goods) and Appendix 5 (comparison goods), which provide further detail in terms of the step-by-step application of the quantitative assessment methodology employed.

Capacity Formula

7.4 For all types of capacity assessment, the conceptual approach is identical, although the data sources and assumptions may differ. The key relationship is Expenditure (£m) (allowing for population change and retail growth) less Turnover (£m) (allowing for improved 'productivity') equals Surplus or Deficit (£m).

7.5 **Expenditure (£m)** – The expenditure element of the above equation is calculated by taking the population within the defined catchment and then multiplying this figure by the average annual expenditure levels for various forms of retail spending per annum. The expenditure is estimated with reference to a number of factors, namely:

- Growth in population;
- Growth in expenditure per person per annum; and
- Special Forms of Trading (e.g. catalogue shopping / internet).

7.6 **Turnover (£m)** – The turnover figure relates to the annual turnover generated by existing retail facilities within the Study Area. The turnover of existing facilities is calculated using Mintel Retail Rankings and Verdict UK Grocery Retailers reports – independent analysis which lists the sales density for all major multiple retailers.

7.7 **Surplus / Deficit (£m)** – This represents the difference between the expenditure and turnover figures outlined above. Clearly, a surplus figure will represent an under provision of retail facilities within the Study Area (which, all things being equal, would suggest that additional floorspace is required), whereas a deficit would suggest an over provision of retail facilities (and in these circumstances it would prove difficult to justify additional floorspace).

7.8 Although a surplus figure is presented in monetary terms, it is possible to convert this figure to provide an indication of the quantum of floorspace which may be required. The level of floorspace will vary dependent on the type of retailer proposed and the type of goods traded. For example, in the case of comparison goods, non-bulky goods retailers tend to achieve higher sales densities than bulky goods retailers. However, within the bulky goods sector itself there is significant variation, with electrical retailers tending to have a much higher sales density than those selling DIY or furniture goods.

Baseline Capacity for Convenience and Comparison Goods Floorspace

Convenience Goods

7.9 In order to ascertain the likely need for additional convenience goods floorspace in Rossendale, it is first necessary to consider the performance of the current provision. Given the geography of the Borough and its reasonably strong retention of convenience goods expenditure across a wide variety of facilities, it is assumed that the future convenience goods expenditure available to Rossendale will be broadly commensurate with its current market share.

7.10 Table 7.1 sets out the current convenience goods trading position compared against the 'benchmark' (or anticipated) turnover of existing convenience goods floorspace and projects this forward to 2034 assuming that the identified market share remains constant. The 'benchmark' turnover differs for each operator based on its average turnover per square metre throughout the country. Although robust up-to-date information is available in terms of the convenience goods floorspace provided by large foodstores, it can be more difficult to quantify the extent of local convenience provision as there is no single comprehensive database to rely upon. Where we have been unable to verify the exact quantum of floorspace provided by existing smaller-scale convenience stores and local centres, we have assumed that these stores / centres are trading 'at equilibrium' (i.e. the survey-derived turnover equates to the expected level of turnover). See Table 5, Appendix 4 for further details of the approach adopted.

7.11 For each convenience goods retail destination, consideration has been given as to whether any of its turnover is likely to be derived as 'inflow' from outside the Study Area. However, given that Rossendale is surrounded by a number of larger settlements which benefit from a stronger convenience goods offer we consider it unlikely that residents of areas further afield (such as Accrington, Burnley, Bury or Rochdale) will travel into the Borough in very significant numbers to undertake food shopping.

7.12 Notwithstanding this, we consider that convenience goods retailers in Rawtenstall town centre and some of the larger, most accessible food superstores within the Rossendale administrative area will benefit from some trade which results from leisure visitors and commuters travelling from outside the area. Accordingly, we have estimated that a limited number of convenience goods shopping destinations will benefit from an additional 10% to 15% of their turnover being derived from outside of the Study Area, based on professional judgement. Table 5 of Appendix 4 identifies the foodstores / centres that we consider are likely to benefit from this inflow expenditure.

7.13 Based on the above assumptions for inflow, an allowance has therefore been made for an additional £9.4m of spending on convenience goods in Rossendale to be generated by residents outside of the Study Area at 2017 (inflow therefore representing 8.4% of the total survey derived convenience turnover of the Borough). The inflow allowance has the net effect of increasing the identified convenience goods survey derived turnover of facilities in Rossendale from £111.8m to £121.2m at 2017.

7.14 As this assessment is based upon a 'goods based' approach which disaggregates expenditure by category type, it is important to recognise that major foodstore operators generally sell an element of non-food goods such as books, compact discs, clothing and household goods.

However, the amount of floorspace dedicated to non-food sales varies significantly between operators. To account for this, the typical ratio between convenience and comparison goods provision for each operator (derived from Verdict UK Food & Grocery Retailers) has been applied to the estimated net floorspace of each foodstore. This provides an indication of the likely sales area dedicated to the sale of convenience goods at each store.

7.15 Whilst survey results are commonly accepted as a means by which to identify existing shopping patterns, their findings should be treated with a 'note of caution' as they tend to have a bias towards larger stores and can understate the role of smaller stores and independent retailers. However, in order to minimise any bias, WYG's methodology asks respondents where they undertake 'most' of their main food or 'top up' shopping and shopping for different types of comparison goods; and also asks 'where else' do they undertake this type of shopping. Obtaining two datasets for each food and non-food category and drawing upon both in establishing shopping patterns ensures that smaller stores and independent retailers are accounted for in our quantitative analysis.

7.16 Table 7.1 below appraises the future baseline capacity for additional convenience goods retail floorspace in Rossendale, taking account of the current convenience goods trading position compared against the benchmark turnover of existing convenience goods facilities in the Borough. It should be noted that this baseline analysis does not take account of existing commitments of new convenience retail floorspace, which is considered later in this section.

7.17 Accordingly, Table 7.1 sets out the benchmark turnover of existing convenience retail facilities in Rossendale in the base year of 2017 and projects this forward to 2034 assuming that the benchmark turnover of existing floorspace will vary in accordance with rates of floorspace efficiency growth set out in Table 4a of Experian Retail Planner Briefing Note 14 (November 2016). In summary, the Briefing Note forecasts negative floorspace efficiency growth of -0.1% in 2017, -0.4% in 2018, and -0.1% per annum between 2019 and 2023. Positive growth of +0.1% per annum is forecast over the 10-year period 2024 to 2034.

7.18 Operators have historically been able to make their existing floorspace more productive over time. However, the negative turnover efficiency growth rates for convenience floorspace in the period up to 2023 and limited positive growth beyond this reflects current forecasts for convenience goods floorspace productivity to fall in the short to medium term and remain relatively static over the overall Study period.

Table 7.1: Baseline Capacity for Convenience Goods Facilities in Rossendale Borough

Year	Benchmark Turnover of Existing Stores (£m)	Derived Turnover (inclusive of inflow) (£m)	Surplus Expenditure (£m)
2017	160.0	121.2	-38.8
2019	159.2	120.8	-38.3
2024	158.7	122.7	-36.0
2029	159.5	124.7	-34.8
2034	160.3	126.7	-33.6

7.19 The £111.8m of convenience goods expenditure generated by residents of the Study Area and claimed by destinations within the Rossendale area (including town centres, local centres, free-standing stores and so on) equates to a market share of 55.3% of all convenience goods expenditure generated by residents within the Study Area. The current market share represents a decrease of 10.6% from the 65.9% market share identified by the 2009 Rossendale Retail Study (which were based on the findings of a November 2008 household survey).

7.20 As explained in Section 4 of this report, the key reason for this is that there has been a significant uplift (+8.2%) in Ramsbottom's convenience goods market share over the past eight years, which falls within the Study Area but outside Rossendale. This includes a new Aldi foodstore (1,036 sq.m net) opening and the centre's Co-operative supermarket (1,334 sq.m net) being converted into a Morrisons store. Accordingly, some 18.4% fewer Zone 4 residents (in which Ramsbottom is located) are travelling north to use the convenience retail facilities within Rossendale.

7.21 As stated above, once inflow is allowed for (£9.4m) then the total derived turnover of existing facilities at 2017 is £121.2m as shown in Table 7.1, which is significantly lower than the estimated benchmark turnover of the existing convenience goods floorspace in Rossendale of £160.0m. A substantial expenditure deficit of -£38.8m at 2017 is therefore identified. This suggests that, taken cumulatively, existing convenience goods facilities in Rossendale are 'undertrading' when compared to their expected turnover. Overall, therefore, it appears that food retail provision in the Borough is currently considerably greater than that required to meet the existing quantitative need. This is not dissimilar to the conclusion reached by the authors of the 2009 Retail Study Update.

7.22 WYG has 'rolled forward' the Study Area's current market share of 55.3% in order to identify the likely convenience goods floorspace required to meet future convenience goods retail needs. Even allowing for growth in population, the limited forecast increases in convenience goods expenditure, forecast increases in spending on 'special forms of trading', changes in floorspace efficiency and inflow of expenditure derived from residents outside of the Study Area, it is not anticipated that a convenience goods expenditure surplus will be realised during the Local Plan period to 2034. Table 7.1 identifies a deficit of -£38.3 in 2019 which is forecast to reduce year-on-year but would still theoretically stand at -£33.6m in 2034.

Comparison Goods

7.23 Turning to comparison goods capacity, it is important to note that this methodology deviates from that which was deployed in respect of convenience goods for two principal reasons. Firstly, it can be extremely difficult to attribute an appropriate benchmark turnover to existing comparison goods provision given the diverse nature of comparison goods floorspace (including retail warehousing, high street multiples, independent retailers, the different types of non-food sectors they operate in and so on). Secondly, there tends to be greater disparity between the trading performance of apparently similar comparison goods provision depending on its location, the character of the area, and the nature of the catchment. As a consequence, the approach adopted with comparison goods floorspace is that it is assumed to be trading 'at equilibrium' at 2017 (i.e. the survey derived turnover estimate effectively acts as benchmark). It is therefore assumed that there is nil quantitative need for any additional floorspace across Rossendale in the 2017 base year.

7.24 As for convenience goods, the results of the household survey have been used to estimate the likely levels of comparison goods expenditure captured by each comparison retail destination within Rossendale and the overall level of comparison goods expenditure which originates within the Study Area which is retained by facilities within the Borough. For each of the seven individual categories of comparison goods, the market share achieved within each zone by each comparison retail destination in Rossendale (as identified from the results of the household survey) was multiplied by the total expenditure generated by residents within each category of goods and Study zone at 2017. The spend at each facility across the seven categories was then added together to provide an overall survey-derived comparison spend estimate for each comparison retail facility at 2017.

7.25 The analysis identifies that in 2017 existing facilities within the Rossendale area achieve a combined comparison goods turnover of £57.8m derived from the Study Area population. This equates to a market share of 20.4% of all comparison goods expenditure generated by residents of the Study Area, and represents a modest decrease in market share of -3.1% when compared to that established by the November 2008 household survey (23.5%) used to prepare the 2009 Retail Study Update. This reduction is not unexpected given that since the preparation of the previous study Bury town centre has witnessed the dramatic expansion of its comparison goods offer with the opening of 'The Rock' shopping centre, which has added some 55,000 sq.m of additional retail floorspace. This illustrates the impact that such investments can have on spending retention and 'leakage'.

7.26 As with the convenience goods assessment, an allowance has been made for a level of comparison goods expenditure inflow to specific centres and foodstores which provide a tourist related offer, as well as those retail facilities which are likely to cater for those who work within the Rossendale area. This includes Rawtenstall town centre and its immediately surrounding major foodstores (Asda, Hollymount Way and Tesco, Bocholt Way) which are likely to benefit from a degree of annual tourist trade. It also includes the Tesco Superstore on Syke Street, Haslingden which is well place to benefit from pass-by trade from commuters given, its location just off the A56.

7.27 It is considered that a 10% allowance for inflow to Rawtenstall town centre's comparison goods provision (centres and foodstores), and a 15% allowance for inflow to Tesco Syke Street, represents a cautious estimate of the additional comparison goods spending likely to be drawn from residents outside the Study Area. Based on the above assumptions for inflow, an allowance has therefore been made for an additional £4.5m of spending on comparison goods in Rossendale at 2017 to be generated by residents outside of the Study Area, equating to 7.7% of the total £57.8m of comparison goods expenditure in the Borough drawn from Study Area residents. Based on the current market share and inflow assumptions, comparison goods floorspace is currently collectively trading at £62.3m.

7.28 Table 7.2 on the following page appraises the future baseline capacity for additional comparison goods retail floorspace in Rossendale prior to taking account of existing planning commitments for new comparison retail floorspace, which is considered later in this section. Table 7.2 sets out the total comparison turnover of existing stores in Rossendale in the 2017 base year and projects this forward to 2034 assuming that the turnover efficiency of existing floorspace will grow in accordance with rates of floorspace efficiency growth set out in Table 4b of Experian Retail Planner Briefing Note 14. In contrast to convenience goods, comparison floorspace efficiency growth is forecast to grow relatively strongly over the study period; increasing by +1.5% in 2017, +1.0% in 2018, +2.3% per annum between 2019 and 2023, and +2.2% per annum over the 10-years 2024 to 2034.

Table 7.2: Baseline Capacity for Comparison Goods Facilities in Rossendale Borough

Year	Turnover of Existing Stores (£m)	Derived Turnover (inclusive of inflow) (£m)	Surplus Expenditure (£m)
2017	62.3	62.3	0.0
2019	64.4	64.7	0.3
2024	72.1	75.8	3.8
2029	80.4	90.0	9.6
2034	89.6	106.5	16.9

7.29 Rolling forward the current market share of 20.4% (assuming that the current comparison goods market share of facilities in Rossendale is maintained over the forecast period) and making an allowance for inflow of expenditure derived from residents outside of the Study Area, it is estimated that the total available comparison goods expenditure in the Borough will increase from £62.3m in 2017, to £64.7m in 2019, and then finally to £106.5m in 2034 at the end of the 15-year Local Plan period.

7.30 Given the forecast increases in population and comparison goods expenditure over the Study period, it is estimated that by 2019 there will be an expenditure surplus to support additional comparison goods floorspace within Rossendale of £0.3m (as set out in Table 7.2). This surplus is forecast to increase to £3.8m at 2024, £9.6m at 2029, and then £16.9m in 2034 at the end of the Local Plan period. The identified surplus is lower than that derived in the 2009 Retail Study, primarily due to the fact that comparison goods growth rates have been revised downwards quite substantially over the past eight years.

Commitments for New Retail Floorspace in Rossendale

7.31 There are a number of commitments for new retail floorspace in Rossendale that are expected to draw on the surplus convenience and comparison goods expenditure available in the Borough. As summarised in Tables 7.3 and 7.4, it is estimated that the extant retail planning permissions for new convenience goods floorspace will turnover around £27.9m in the 2017 base year. It is important to note that for the purposes of the quantitative assessment we have only considered Class A1 retail commitments with a net sales area of

200 sq.m or above, given that floorspace below this threshold is unlikely to make a material difference to our conclusions in relation to overall expenditure capacity.

7.32 The current convenience goods planning commitments of relevance to the quantitative need assessment are all located within Zone 2 of the Study Area at New Hall Hey Retail Park, just west of Rawtenstall town centre. The scheme currently comprises a terrace of four large format retail units of varying sizes ('Phase I'). Whilst Phase I of the scheme had been constructed at the time of the household telephone survey in February 2016, only one of its retail units (Pets at Home) was operational. However, in March 2016, a Marks & Spencer ('M&S') Simply Food store opened, followed by TK Maxx in April 2016. A further comparison goods retail unit remains unlet.

7.33 The only unit of consequence to the convenience goods capacity assessment in Phase I of the New Hall Hey scheme is the M&S Simply Food. This has a Gross Internal Area ('GIA') of 1,162 sq.m and a net sales area of 929 sq.m (of which 883 sq.m is devoted to the sale of convenience goods). These figures have been sourced from the Retail Impact Assessment which supported Application Ref. 2014/0384 (application approved with conditions 31st July 2015).

7.34 Phase II of the New Hall Hey Retail Park scheme was granted planning permission in September 2016 (Application Ref. 2016/0129) and involves the introduction of an Aldi foodstore (Class A1), a frozen food store (Class A1), a non-food retail unit (Class A1), and a small restaurant / refreshment unit (Class A1, A3 or A5)[14]. At the time of writing Phase II of New Hall Hey Retail Park is under construction.

7.35 The units of relevance to the convenience goods need assessment in Phase II of the scheme are the Aldi discount foodstore of 1,718 sq.m GIA / 1,254 sq.m net sales and the frozen foodstore of 929 sq.m GIA / 743 sq.m net sales. Based on the Retail Impact Assessment which supported Application Ref. 2016/0129, it is anticipated that 1,003 sq.m of the discount foodstore's floorspace and 706 sq.m of the frozen foodstore's floorspace will be devoted to the sale of convenience goods.

[14] During the preparation of this Retail Study a Section 73 application (Ref. 2016/0544) was submitted pursuant to Phase II of the New Hall Hey scheme (Ref. 2016/0129) in order to alter the internal configuration of the consented floorspace such that the frozen food store and non-food retail unit are replaced by a variety discount store (1,393 sq.m gross) and a sandwich shop. At the time of writing a decision had not been made in relation to this planning application by the Local Planning Authority. However, given that the overall quantum of retail floorspace within the scheme would remain broadly the same, it is not considered that the change proposed would materially alter the findings or conclusion of this Retail Study.

7.36 Table 7.3 below shows that the three convenience goods commitments identified are estimated to generate a turnover of £27.9m in the base year of 2017. However, it has only been assumed that £15.2m (55%) of this turnover will actually be diverted from Rossendale facilities and thus diverted from any expenditure capacity arising within the Borough's convenience goods floorspace. This is by virtue of the fact that the Aldi discount foodstore and M&S Simply Food in particular are anticipated to 'claw-back' some of their trade from equivalent facilities which lie outside the Rossendale Area, given that neither fascia is currently present.

Table 7.3: Extant Convenience Commitments within the Study Area at January 2017

Zone	Planning Application Reference	Proposal	Net Conv Sales (sq.m)	Conv Sales Density (£ per sq.m)	Estimated Turnover at 2017 (£m)	Turnover Diverted from Rossendale (£m)	Status
2	2016/0129	Aldi Foodstore, New Hall Hey Retail Park, Phase II	1,003	12,794	12.8	6.4	Under Construction
2	2016/0129	Frozen Food Store, New Hall Hey Retail Park, Phase II	706	7,366	5.2	3.9	Under Construction
2	2014/0384	M&S Simply Food, New Hall Hey Retail Park, Phase I	883	11,173	9.9	4.9	Opened March 2016
Total			**2,592**	**-**	**27.9**	**15.2**	-

7.37 Table 7.4 on the following page indicates that almost twice as much comparison goods floorspace is committed through extant planning permissions than that identified for convenience goods. Due to typically lower sales densities being achieved for comparison goods, it is estimated that together these commitments would account for around £16.6m of comparison goods expenditure were they all implemented at 2017.

7.38 In addition to the net comparison goods sales space contained within New Hall Hey's M&S Simply Food store, Aldi discount foodstore, and frozen food store (46 sq.m, 251 sq.m, and 37 sq.m respectively), the retail park also comprises a TK Maxx unit and two further Class A1 comparison goods units (currently unlet) which need to be taken into account as part of the comparison goods need assessment[15]. The retail impact assessments submitted in support of

[15] It should be noted that Phase I of the New Hall Hey scheme also includes a Pets at Home non-food retail unit. However, this was open and trading at the time of the study's household telephone shopper survey and as such has not been included as a commitment in the quantitative need assessment.

applications 2016/0129 and 2014/0384 confirm that the TK Maxx unit has a 2,236 sq.m GIA and a 1,788sqm net sales area, all of which is devoted to the sale of comparison goods. The unlet Class A1 unit which forms part of Phase I of the retail park (which has already been constructed) is understood to contain 1,194 sq.m net comparison goods sales space; whilst the other Class A1 comparison goods unit, which forms part of Phase II (and is currently under construction), contains 594 sq.m net sales space

7.39 In a similar vein to the convenience goods assessment, it has only been assumed that £6.6m (40%) of the total comparison goods turnover of the commitments will actually be diverted from Rossendale facilities. This is because a relatively high degree of expenditure 'clawback' is anticipated by the Aldi, M&S Simply Food and TK Maxx stores as each contains a retail offer which Rossendale residents are currently leaving the Borough to benefit from.

Table 7.4: Extant Comparison Commitments within the Study Area at January 2017

Zone	Planning Application Reference	Proposal	Net Comp Sales (sq.m)	Comp Sales Density (£ per sq.m)	Estimated Turnover at 2017 (£m)	Turnover Diverted from Rossendale (£m)	Status
2	2016/0129	Aldi Foodstore, New Hall Hey Retail Park, Phase II	251	8,897	2.2	1.6	Extant Permission
2	2016/0129	Frozen Food Store, New Hall Hey Retail Park, Phase II	37	7,203	0.3	0.2	Extant Permission
2	2016/0129	Class A1 Retail Unit, New Hall Hey Retail Park, Phase II	594	4,482	2.7	1.6	Extant Permission
2	2014/0384	M&S Simply Food, New Hall Hey Retail Park, Phase I	46	8,822	0.4	0.2	Opened March 2016
2	2014/0384	TK Maxx, New Hall Hey Retail Park, Phase I	1,788	3,188	5.7	1.4	Opened April 2016
2	2014/0384	Class A1 Retail Unit, New Hall Hey Retail Park, Phase I	1,194	4,482	5.4	1.6	Completed Retail Unit
Total			**3,911**		**16.6**	**6.6**	

Residual Quantitative Need for Additional Retail Floorspace Post Implementation of Commitments

7.40 Table 7.5 below sets out the residual convenience expenditure capacity in Rossendale, taking into account the turnover requirements of extant planning commitments for new convenience retail floorspace. As explained, it has been assumed that only £15.2m (55%) of the estimated convenience turnover of the commitments will be drawn from the available expenditure within the Borough. The residual convenience expenditure capacity is then converted to a maximum and minimum floorspace requirement. The minimum figure is based on the identified need being met through the delivery of a new foodstore by one of the leading supermarket operators (Asda, Morrisons, Sainsbury's or Tesco) and the maximum figure relates to need being met by independent or discount operators, which generally achieve lower sales densities.

7.41 This section's earlier commentary on 'baseline' capacity for convenience floorspace has already found that an expenditure surplus will not be realised during the Local Plan period to 2034, such is the scale of existing food retail provision available within the Rossendale area compared to local demand. Accordingly, once the £15.2m turnover of convenience goods commitments are taken account of, capacity for additional floorspace falls further to -£54.0m in 2017. Whilst the positive effects of population growth and modest convenience goods expenditure increases improve the position slightly by the end of the Study Period (2034), negative capacity is still anticipated to stand at -£48.9m or -3,800 sq.m in this final test year.

Table 7.5: Residual Quantitative Need for Additional Convenience Goods Floorspace in Rossendale Post Implementation of Commitments

Year	Surplus Expenditure (£m)	Commitments Turnover from Rossendale (£m)	Residual Expenditure (£m)	Min Floorspace Requirement (sq.m)	Max Floorspace Requirement (sq.m)
2017	-38.8	15.2	-54.0	-4,200	-6,300
2019	-38.3	15.2	-53.5	-4,100	-6,300
2024	-36.0	15.1	-51.1	-4,000	-6,100
2029	-34.8	15.2	-50.0	-3,900	-5,900
2034	-33.6	15.3	-48.9	-3,800	-5,700

7.42 Table 7.6 below sets out the residual comparison expenditure capacity in Rossendale taking into account the turnover requirements of extant commitments for new comparison retail floorspace. It has been assumed that only £6.6m (40%) of the estimated comparison turnover of the commitments will be drawn from retail facilities within the Borough. Table 7.6 identifies that the existing commitments for new comparison retail floorspace will absorb all of the surplus expenditure arising in the period up to 2024. In the longer term, a modest comparison goods expenditure residual of £1.1m remains at 2029 once the turnover requirements of existing commitments are taken into account, increasing to £7.4m in 2034 at the end of the Local Plan period.

7.43 In order to account for the differing trading performance of potential end operators, sales densities of £3,000 per sq.m and £5,000 per sq.m have been applied to the identified residual expenditure. Allowing for increases in the productivity of existing floorspace, it is estimated that by 2029 there will be a requirement for an additional 200 sq.m to 300 sq.m net of comparison retail floorspace across Rossendale, depending on the format of the floorspace and assuming the current market share of existing comparison retail facilities in the Borough is maintained. The requirement rises to between an additional 1,000 sq.m and 1,700 sq.m of net floorspace by 2034, by which time increases in comparison goods expenditure are forecast to be more substantial.

Table 7.6: Residual Quantitative Need for Additional Comparison Goods Floorspace in Rossendale Post Implementation of Commitments

Year	Surplus Expenditure (£m)	Commitments Turnover from Rossendale (£m)	Residual Expenditure (£m)	Min Floorspace Requirement (sq.m)	Max Floorspace Requirement (sq.m)
2017	0.0	6.6	-6.6	-1,300	-2,200
2019	0.3	6.8	-6.5	-1,300	-2,100
2024	3.8	7.6	-3.9	-700	-1,100
2029	9.6	8.5	1.1	200	300
2034	16.9	9.5	7.4	1,000	1,700

Capacity for Future Retail Floorspace in Rossendale's Town and District Centres

7.44 This section of the report seeks to attribute any identified capacity requirements spatially to Rossendale's town and district centres. This comprises Rawtenstall town centre, Haslingden district centre and Bacup district centre. The assessment for each centre is set out below.

Rawtenstall Town Centre

Convenience Goods

7.45 In terms of convenience goods shopping, existing facilities within and immediately surrounding Rawtenstall town centre are identified to achieve a convenience goods turnover drawn from the Study Area of £66.5m at 2017, equating to a market share of 32.9% (previously 39.5% in 2008) of all such expenditure generated within the defined Study Area. It is also assumed that an additional £6.6m (10.0% of the convenience goods turnover drawn from the Study Area) will be drawn as tourism inflow expenditure, which increases the derived turnover of Rawtenstall to £73.1m at 2017. By applying company average sales densities to the identified existing floorspace within and immediately surrounding Rawtenstall, it is estimated that the existing convenience floorspace has a benchmark turnover of £82.7m.

Table 7.7: Trading Performance of Current Foodstores in Rawtenstall

Destination	Gross Floorspace (sq.m)	Net Convenience Floorspace (sq.m)	Benchmark Sales Density (£ per sq.m)	Benchmark Turnover (£m)	Survey Derived Turnover (inc inflow) (£m)
In Centre					
Rawtenstall Town Centre, Local Shops	-	-	-	2.6	2.9
Edge of Centre					
Asda, Hollymount Way	10,655	2,991	13,863	41.5	42.5
Lidl, Bacup Road	1,117	641	4,228	2.7	7.5
Out-of-Centre					
Tesco, Bocholt Way	6,604	2,677	13,413	35.9	20.2
Total	-	-	-	**82.7**	**73.1**

7.46 Table 7.7 indicates that existing convenience goods facilities are collectively trading some £9.6m (11.6%) below benchmark levels, with this largely attributed to the fact that the Tesco store on Bocholt Way is performing particularly poorly (trading some £15.7m below company average levels). As a consequence of this, and as indicated in Table 7.8 below, a negative expenditure capacity position of -£9.6m is estimated at 2017. Whilst population and expenditure growth will see this reduce to -£6.5m by 2034, it remains clear that there is no quantitative need to provide additional convenience goods floorspace within Rawtenstall over the Plan Period.

Table 7.8: Baseline Capacity for Convenience Goods Facilities in Rawtenstall

Year	Benchmark Turnover of Existing Stores (£m)	Derived Turnover (inclusive of inflow) (£m)	Surplus Expenditure (£m)
2017	82.7	73.1	-9.6
2019	82.3	72.9	-9.4
2024	82.1	74.0	-8.0
2029	82.5	75.2	-7.3
2034	82.9	76.4	-6.5

7.47 Table 7.9 below sets out the residual convenience expenditure capacity in Rawtenstall taking into account the turnover requirements of the extant commitments for new convenience retail floorspace. It is assumed that £9.3m (60%) of the estimated convenience goods diversion of commitments from Rossendale as a whole (£15.2m) will be drawn from facilities within and immediately surrounding Rawtenstall town centre. This is principally as a consequence of New Hall Hey's proximity to the centre. The introduction of M&S Simply Food, Aldi, and a frozen food store on the retail park more than extinguishes any need for additional convenience goods floorspace in Rawtenstall over the Study period to 2034 based on the town's existing market share.

Table 7.9: Residual Quantitative Need for Additional Convenience Goods Floorspace in Rawtenstall Post Implementation of Commitments

Year	Surplus Expenditure (£m)	Commitments Turnover from Rawtenstall (£m)	Residual Expenditure (£m)	Min Floorspace Requirement (sq.m)	Max Floorspace Requirement (sq.m)
2017	-9.6	9.3	-18.9	-1,500	-2,200
2019	-9.4	9.2	-18.7	-1,400	-2,200
2024	-8.0	9.2	-17.3	-1,300	-2,000
2029	-7.3	9.3	-16.5	-1,300	-1,900
2034	-6.5	9.3	-15.8	-1,200	-1,900

Comparison Goods Retailing

7.48 For comparison goods shopping, Rawtenstall attracts £36.9m of expenditure from the Study Area in the base year of 2017, equating to a market share of approximately 13.0% (reduced from 17.1% in 2008). WYG has also estimated that Rawtenstall will benefit from a degree of inflow expenditure given its tourist and leisure offer, and accordingly the survey derived turnover of facilities has been increased by £3.7m to £40.6m at 2017, allowing for inflow of 10% based upon a professional judgement.

7.49 Given expected sales floor efficiency improvements in the turnover of existing floorspace, it is estimated that only a very modest expenditure surplus of £0.2m will be apparent at 2019 to support additional comparison goods floorspace, as shown in Table 7.10 below. However, over the plan period this surplus is estimated to increase to £2.4m in 2024, £6.3m in 2029, and £11.0m in 2034.

Table 7.10: Baseline Capacity for Comparison Goods Facilities in Rawtenstall

Year	Turnover of Existing Stores (£m)	Derived Turnover (inclusive of inflow) (£m)	Surplus Expenditure (£m)
2017	40.6	40.6	0.0
2019	41.9	42.1	0.2
2024	46.9	49.4	2.4
2029	52.3	58.6	6.3
2034	58.3	69.3	11.0

7.50 As explained in the preceding section, there are extant planning permissions for new comparison retail floorspace in Rossendale totalling £16.6m, although only £6.6m (40%) of this is estimated to be drawn from retail facilities within the Borough. Once all are constructed, it is estimated that they will divert some £4.1m (62%) of their total turnover from Rawtenstall’s existing comparison goods floorspace.

7.51 Table 7.11 on the following page shows that the committed comparison goods floorspace, which includes TK Maxx amongst others, would extinguish any capacity up to 2024. However, by 2029, a positive expenditure residual of £1.0m is identified increasing to £5.1m by the end of the plan period. This would be sufficient to support between 200 sq.m and 300 sq.m net comparison retail floorspace in the town by 2029, and between 700 sq.m and 1,200 sq.m net comparison retail floorspace by 2034; depending on the type and format of operators.

Table 7.11: Residual Quantitative Need for Additional Comparison Goods Floorspace in Rawtenstall Post Implementation of Commitments

Year	Surplus Expenditure (£m)	Commitments Turnover from Rawtenstall (£m)	Residual Expenditure (£m)	Min Floorspace Requirement (sq.m)	Max Floorspace Requirement (sq.m)
2017	0.0	4.1	-4.1	-800	-1,400
2019	0.2	4.2	-4.0	-800	-1,300
2024	2.4	4.7	-2.3	-400	-700
2029	6.3	5.3	1.0	200	300
2034	11.0	5.9	5.1	700	1,200

Haslingden District Centre

Convenience Goods

7.52 Table 7.12 indicates that existing convenience goods facilities in Haslingden are identified to be trading just below expected levels by £0.9m (or -16.6%) at 2017. Existing facilities within and immediately surrounding Haslingden district centre are identified to achieve a convenience goods turnover drawn from the Study Area of £4.5m at 2017, equating to a market share of 2.2% (previously 2.8% in 2008) of all such expenditure generated within the defined Study Area. By applying company average sales densities to the identified existing floorspace within and immediately surrounding Haslingden (including local shops, a Co-operative foodstore and Nisa supermarket), it is estimated that the existing convenience retail offer has a benchmark turnover of £5.4m.

Table 7.12: Trading Performance of Current Foodstores in Haslingden

Destination	Gross Floorspace (sq.m)	Net Convenience Floorspace (sq.m)	Benchmark Sales Density (£ per sq.m)	Benchmark Turnover (£m)	Survey Derived Turnover (inc inflow) (£m)
In Centre					
Haslingden District Centre, Local Shops	-	-	-	1.9	1.9
Edge of Centre					
Co-op, John Street	348	204	8,491	1.7	2.1
Nisa, Deardengate	438	292	6,228	1.8	0.5
Total	-	-	-	**5.4**	**4.5**

7.53 As a consequence of the modest undertrading identified, a negative expenditure capacity position of -£0.9m is estimated in 2017. Population and expenditure growth will see this reduce to -£0.7m by 2034. However, as Table 7.13 below shows, it remains the case that there will be no quantitative need to provide additional convenience goods floorspace within Haslingden over the Plan Period, even without factoring in the influence of commitments.

Table 7.13: Baseline Capacity for Convenience Goods Facilities in Haslingden

Year	Benchmark Turnover of Existing Stores (£m)	Derived Turnover (inclusive of inflow) (£m)	Surplus Expenditure (£m)
2017	5.4	4.5	-0.9
2019	5.4	4.5	-0.9
2024	5.4	4.6	-0.8
2029	5.4	4.6	-0.8
2034	5.4	4.7	-0.7

7.54 Turning to committed convenience floorspace, it is assumed that just £0.9m (6%) of the estimated convenience goods diversion of commitments from Rossendale as a whole (£15.2m) will be drawn from facilities within and surrounding Haslingden district centre. This is given that these facilities are located in Rawtenstall and are unlikely to have a significant effect on Haslingden's locally focussed offer. Table 7.14 below sets out the residual convenience expenditure capacity in Haslingden taking into account the turnover requirements of the extant commitments for new convenience retail floorspace. It shows that the negative capacity position increases further compared to the baseline assessment set out in Table 7.13.

Table 7.14: Residual Quantitative Need for Additional Convenience Goods Floorspace in Haslingden Post Implementation of Commitments

Year	Surplus Expenditure (£m)	Commitments Turnover from Haslingden (£m)	Residual Expenditure (£m)	Min Floorspace Requirement (sq.m)	Max Floorspace Requirement (sq.m)
2017	-0.9	0.9	-1.8	-100	-200
2019	-0.9	0.9	-1.8	-100	-200
2024	-0.8	0.9	-1.7	-100	-200
2029	-0.8	0.9	-1.6	-100	-200
2034	-0.7	0.9	-1.6	-100	-200

Comparison Goods Retailing

7.55 Overall, existing comparison goods facilities in Haslingden are identified to have a turnover of £5.9m, all of which is derived from the Study Area. This equates to a market share of 2.1%, which is comparable to that found in 2008 (3.8%) bearing in mind that the previous Retail Study included the out-of-centre Tesco, Syke Street in their figure. WYG has not assumed any inflow for Haslingden given that an immaterial amount of expenditure is expected to be attracted to a centre of this order from outside the Study Area.

7.56 As a consequence of forecast increases in comparison goods expenditure and population, as well as allowing for year-on-year increases in the productivity of existing floorspace, it is estimated that by 2024 there will be a modest expenditure surplus of £0.4m to support additional comparison goods floorspace within Haslingden. As set out in Table 7.15, this surplus is forecast to increase to £0.9m at 2029 and then to £1.6m at the end of the Local Plan period.

Table 7.15: Baseline Capacity for Comparison Goods Facilities in Haslingden

Year	Turnover of Existing Stores (£m)	Derived Turnover (inclusive of inflow) (£m)	Surplus Expenditure (£m)
2017	5.9	5.9	0.0
2019	6.1	6.1	0.0
2024	6.8	7.1	0.4
2029	7.6	8.5	0.9
2034	8.4	10.0	1.6

7.57 Extant planning permissions for new comparison retail floorspace in Rossendale total £16.6m and of this £6.6m (40%) is estimated to be drawn from retail facilities within the Borough. However, given the location of these commitments in Rawtenstall and bearing in mind the contrasting offer of Haslingden district centre, it is estimated that they will divert just £0.5m (8%) of their total turnover from the district centre’s existing comparison goods floorspace.

7.58 Table 7.16 on the following page shows that even though the diversion of expenditure from Haslingden’s facilities to the committed comparison goods floorspace at New Hall Hey will be limited, it is still sufficient to extinguish any expenditure capacity up to 2024. However, by 2029, a positive expenditure residual of £0.2m is identified increasing to £0.8m by the end of the plan period. This would be sufficient to support 100 sq.m net comparison retail floorspace in the district centre by 2029, and between 100 sq.m and 200 sq.m net by 2034; depending on the type and format of operators.

Table 7.16: Residual Quantitative Need for Additional Comparison Goods Floorspace in Haslingden Post Implementation of Commitments

Year	Surplus Expenditure (£m)	Commitments Turnover from Haslingden (£m)	Residual Expenditure (£m)	Min Floorspace Requirement (sq.m)	Max Floorspace Requirement (sq.m)
2017	0.0	0.5	-0.5	-100	-200
2019	0.0	0.5	-0.5	-100	-200
2024	0.4	0.6	-0.2	0	-100
2029	0.9	0.7	0.2	0	100
2034	1.6	0.7	0.8	100	200

Bacup District Centre

Convenience Goods

7.59 Based on the results of the household survey, Table 7.17 indicates that existing convenience facilities within Bacup are identified to be trading marginally below expected levels by £0.6m (or 3.6%) at 2017. However, the centre's convenience goods market share has increased notably since 2008, rising from 4.4% to 7.9% as a consequence of the opening of Morrisons, Lee Street. Table 7.17 shows that this facility is performing well, and is trading at some £2.9m above benchmark levels. In contrast, our capacity assessment suggests that both the Co-operative foodstore on Irwell Street and the One Stop on King Street are trading below company average levels by £2.3m and £1.2m respectively.

Table 7.17: Trading Performance of Current Foodstores in Bacup

Destination	Gross Floorspace (sq.m)	Net Convenience Floorspace (sq.m)	Benchmark Sales Density (£ per sq.m)	Benchmark Turnover (£m)	Survey Derived Turnover (inc inflow) (£m)
In Centre					
Bacup District Centre	-	-	-	1.0	1.0
Edge of Centre					
Morrisons, Lee Street	2,231	824	12,064	9.9	12.8
Co-op, Irwell Street	851	497	8,491	4.2	1.9
One Stop, King Street	230	179	8,445	1.5	0.3
Total	-	-	-	**16.6**	**16.0**

7.60 As Table 7.18 below shows, by rolling forward Bacup's current market share of 7.9% it is estimated that there is a convenience expenditure deficit in the centre in the period up to 2029 and an expenditure surplus of just under £0.1m by the end of the Local Plan period in 2034. This confirms that, on the basis of the survey informed baseline quantitative assessment, there is essentially no capacity for new convenience floorspace in Bacup district centre based on the retention of the existing market share over the plan period.

Table 7.18: Baseline Capacity for Convenience Goods Facilities in Bacup

Year	Benchmark Turnover of Existing Stores (£m)	Derived Turnover (inclusive of inflow) (£m)	Surplus Expenditure (£m)
2017	16.7	16.0	-0.6
2019	16.6	16.0	-0.6
2024	16.5	16.2	-0.3
2029	16.6	16.5	-0.1
2034	16.7	16.8	0.0

7.61 However, an important caveat that needs to be placed on Bacup's baseline quantitative analysis is that following the household survey being undertaken in February 2016 (which forms the basis of our assessment) the Co-op foodstore on Irwell Street has closed and has been converted to a B&M Bargains variety discount store. As Table 7.17 highlights, the Co-op attracted £1.9m of convenience goods expenditure from the Study Area and following its closure some of this is anticipated to have been absorbed by B&M Bargains (which incorporates a limited amount of convenience goods floorspace) whilst the remainder is likely to have diverted to Bacup's other foodstores (i.e. Morrisons and One Stop).

7.62 More importantly, the Co-op unit was found to be undertrading as part of the quantitative analysis by some £2.3m and if it is assumed that this is no longer the case (with B&M containing far less convenience floorspace and having a much lower sales density) then theoretically there may no longer be a negative capacity position in the centre in the base year of 2017. It is also possible that there will be a slightly higher expenditure surplus available in Bacup at the end of the plan period. Notwithstanding this, with the difference in 2034 only likely to be in the order of £2m (or 150 sq.m to 230 sq.m net floorspace), it does not fundamentally change our overall conclusion in relation to the baseline quantitative assessment that there will be only very limited capacity for new convenience floorspace in Bacup district centre over the plan period.

7.63 Turning to committed convenience floorspace and its implications for Bacup, given that the consented Aldi, M&S Simply Food, and frozen foodstore are proposed in Rawtenstall it is assumed that just £1.5m (10%) of the estimated combined convenience turnover of these commitments will be drawn from facilities within and surrounding Bacup district centre. Table 7.19 below sets out the residual convenience expenditure capacity in Bacup taking into account the turnover requirements of the extant commitments for new convenience retail floorspace in the Borough. It shows that whilst their effects are limited, they are sufficient to extinguish any quantitative need for additional convenience goods floorspace up to the end of the Local Plan period in 2034.

Table 7.19: Residual Quantitative Need for Additional Convenience Goods Floorspace in Bacup Post Implementation of Commitments

Year	Surplus Expenditure (£m)	Commitments Turnover from Bacup (£m)	Residual Expenditure (£m)	Min Floorspace Requirement (sq.m)	Max Floorspace Requirement (sq.m)
2017	-0.6	1.5	-2.2	-200	-300
2019	-0.6	1.5	-2.1	-200	-300
2024	-0.3	1.5	-1.8	-100	-200
2029	-0.1	1.5	-1.7	-100	-200
2034	0.0	1.5	-1.5	-100	-200

7.64 With regard to the effects of the closure of Bacup's Co-op foodstore on the figures presented in Table 7.19, if this unit's previously identified under-trading (£2.3m) is deducted from the residual expenditure then theoretically, with commitments accounted for, there would be a surplus of £0.1m in 2017, rather than -£2.2m. This surplus would then grow marginally year-on-year to £0.8m by the end of the Local Plan period (2034) as oppose to the position highlighted in Table 7.19, which shows a deficiency even in this final test year. However, given that this alternative capacity figure would generate a maximum requirement for just 60 sq.m to 100 sq.m net additional convenience goods floorspace, the fact remains that there is no quantitative need to plan for a new foodstore to serve Bacup even following the Co-operative foodstore's closure.

Comparison Goods Retailing

7.65 Table 7.20 indicates that existing comparison goods facilities within Bacup district centre are identified to have a survey derived trading level of £6.9m at 2017, which equates to a market share of 2.4%. This represents a 1.0% increase on the 1.4% identified in the 2009 Retail Study based on the November 2008 household survey findings and can be attributed to the opening of the Morrisons foodstore in 2013 (which incorporates a quantum of comparison goods floorspace). WYG has not assumed any expenditure inflow to Bacup's comparison floorspace given that an immaterial amount of trade is expected to be attracted to a centre of this order from outside the Study Area.

7.66 Given the forecast increases in comparison goods expenditure and population (allowing for year on year increases in the productivity of existing floorspace), it is estimated that by 2024 there will be a modest expenditure surplus of £0.4m to support additional comparison goods floorspace within Bacup, prior to taking account of any commitments. As set out in Table 7.20, this surplus is forecast to increase to £1.1m at 2029 and then to £1.9m at 2034. Account has been made for the turnover efficiency of existing comparison goods floorspace to increase (on the basis that operators are generally able to make their existing floorspace more productive over time).

Table 7.20: Baseline Capacity for Comparison Goods Facilities in Bacup

Year	Turnover of Existing Stores (£m)	Derived Turnover (inclusive of inflow) (£m)	Surplus Expenditure (£m)
2017	6.9	6.9	0.0
2019	7.1	7.1	0.0
2024	8.0	8.4	0.4
2029	8.9	9.9	1.1
2034	9.9	11.8	1.9

7.67 As already explained within this section of the report, planning permissions for new comparison goods retail floorspace in Rossendale total £16.6m and of this £6.6m (40%) is estimated to be drawn from retail facilities within the Borough. Given that the identified comparison goods commitments are located in Rawtenstall and Bacup's comparison goods offer has a very different character to that of New Hall Hey Retail Park, it is estimated that they will divert just £0.5m (8%) of their total turnover from the district centre's existing floorspace.

7.68 Table 7.21 on the following page shows that even though the diversion of expenditure from Bacup's facilities to the committed comparison goods floorspace at New Hall Hey will be relatively low, it is still sufficient to absorb any expenditure capacity up to 2024. However, by 2029, a positive expenditure residual of £0.4m is identified and would be sufficient to accommodate 100 sq.m (net) comparison goods floorspace based on existing market share. This increases further by the end of the Local Plan period (2034) to £1.1m, and would be enough to support 200 sq.m to 300 sq.m (net) comparison goods floorspace, once existing commitments are taken into account.

Table 7.21: Residual Quantitative Need for Additional Comparison Goods Floorspace in Bacup Post Implementation of Commitments

Year	Surplus Expenditure (£m)	Commitments Turnover from Bacup (£m)	Residual Expenditure (£m)	Min Floorspace Requirement (sq.m)	Max Floorspace Requirement (sq.m)
2017	0.0	0.5	-0.5	-100	-200
2019	0.0	0.5	-0.5	-100	-100
2024	0.4	0.6	-0.2	0	0
2029	1.1	0.7	0.4	100	100
2034	1.9	0.7	1.1	200	300

Qualitative Need

7.69 The NPPF (Paragraph 161) highlights that when preparing their evidence base to inform the development plan Local Planning Authorities should assess *'the needs for land or floorspace for economic development, including both the quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including for retail and leisure development'*. Accordingly, this section of our report examines the qualitative need for additional convenience and comparison retail floorspace to serve Rossendale, focusing on the key issues of 'consumer choice' and 'gaps in provision' and having regard to the town centre of Rawtenstall and the district centres of Bacup and Haslingden.

Convenience Goods

7.70 Having regard firstly to consumer choice and competition in the convenience goods sector, this report has already touched upon the fact that Rossendale is relatively well catered for in terms of its provision and distribution of 'main' and 'top-up' food shopping facilities. Each of the Borough's three main settlements of Rawtenstall, Haslingden and Bacup is served by at least one major foodstore as well as a smaller scale supplementary offer.

7.71 For example, Rawtenstall town centre benefits from major Asda and Tesco foodstores just outside its Primary Shopping Area, in addition to a well-connected Lidl and a M&S Simply Food store. In combination, these facilities provide a comprehensive 'main' food offer which caters for a range of tastes and is well placed to serve not only the populace of Rawtenstall but also Crawshawbooth to the north, Waterfoot to the east, and Edenfield to the south.

Notwithstanding this, these smaller centres benefit from a smaller scale convenience retail offer which caters for localised 'top-up' shopping needs – with Waterfoot in particular benefiting from a well-stocked Co-operative store. Given these factors, it is unsurprising that Zone 2 of the Study Area (in which Rawtenstall falls) sees by far the highest rate of convenience expenditure retention in Rossendale facilities (82.8%) of the four zones surveyed, with 69.1% of this shopping taking place in Rawtenstall's foodstores.

7.72 In the case of Haslingden, this benefits from medium sized Co-operative and Nisa supermarkets just outside the district centre's Core Strategy defined Primary Shopping Area, as well as a large Tesco Extra superstore which occupies an out-of-centre location to the south of the settlement. This offer is considered to be of a sufficient scale and appropriately located to adequately serve the 'main' food shopping needs of Haslingden, Helmshore and Rising Bridge, whilst a good network of smaller scale convenience stores within these residential areas ensures day-to-day 'top-up' shopping requirements are also met.

7.73 The 2016 household survey confirms that a relatively healthy 57.6% of all convenience goods expenditure originating in Zone 1 (Haslingden) is being spent in Rossendale, with the majority in Haslingden's facilities. This represents a relatively strong performance when it is considered that the northernmost part of the zone actually encompasses part of Accrington, whose residents will naturally look to Accrington town centre's convenience offer to meet their food shopping needs.

7.74 Finally, in respect of Bacup and the east of the Borough; this district centre benefits from a relatively new Morrisons foodstore and a One Stop convenience store close to its Primary Shopping Area. Until very recently the centre also contained a Co-operative foodstore which has now closed and has been converted to B&M Bargains. Notwithstanding this, the provision remaining (including the centre's independent retail offer) is considered broadly sufficient to meet 'main' and 'top-up' food shopping needs – even if consumer choice has been diminished somewhat with the loss of the Co-operative supermarket.

7.75 Other settlements of note in the east of Rossendale are Whitworth, Shawforth and Facit, as well as other smaller hamlets along the Whitworth Valley. Whilst the population in this area is likely to look to Bacup for their 'main' food shopping needs, and this is to be expected given the district centre's role and function, the smaller settlements are relatively well catered for in terms of 'top-up' shopping provision. For example, Whitworth benefits from a medium sized Co-operative store on Thorneylea Road as well as a more recently constructed

Tesco Express on Market Street. These facilities, in conjunction with various smaller independent convenience units, ensure that day-to-day food shopping needs are adequately met within the Whitworth Valley.

7.76 The adequacy of provision in the east of the Borough is further evidenced by the household shopper survey results, which show that 68.2% of the convenience goods expenditure generated in Zone 3 (Bacup and the Whitworth Valley) is spent within Rossendale's food shopping facilities, and at least half of this in Zone 3 itself. This is considered to represent a strong performance, not least given that parts of the Whitworth Valley are arguably closer to Rochdale's major convenience retail facilities than they are Rossendale's.

7.77 The above analysis and the empirical evidence referenced has demonstrated that the scale and spatial distribution of Rossendale's food retail provision appears adequate to serve the needs of the population and provides a good choice in terms of the range of facilities. However, another key indicator of whether there is a qualitative need for improved choice and competition within the Study Area is if there is evidence of 'over-trading' or 'under-trading' in the Borough's convenience retail facilities when survey derived turnovers are compared to company average turnovers. A full assessment of the trading performance of each foodstore in Rossendale is set out in Table 5 of Appendix 4. However, Table 7.22 below summarises the position in respect of all stores with a net convenience goods sales area of 200 sq.m or more.

Table 7.22: Performance of Convenience Goods Floorspace of Rossendale's Main Foodstores

Zone	Foodstore	Net Conv Floorspace (sq.m)	Benchmark Turnover (£m) 2017	Survey Derived Turnover (Inc. Inflow) (£m) 2017	Over/ Under-trading (£m) 2017
1	Tesco, Syke Street, Haslingden	3,080	41.3	21.0	-20.3
1	Co-op, John Street, Haslingden	204	1.7	2.1	+0.4
1	Nisa, Deardengate, Haslingden	292	1.8	0.5	-1.3
2	Asda, Hollymount Way, Rawtenstall	2,991	41.5	42.5	+1.0
2	Lidl, Bacup Road, Rawtenstall	641	2.7	7.5	+4.8
2	Tesco, Bocholt Way, Rawtenstall	2,677	35.9	20.2	-15.7
2	Spar, Burnley Road, Rawtenstall	208	1.4	1.0	-0.5
2	Co-op, Bacup Road, Waterfoot	293	2.5	0.4	-2.1
3	Morrisons, Lee Street, Bacup	824	9.9	12.8	+2.9
3	Co-op, Thorneylea Road, Whitworth	344	2.9	1.3	-1.6
3	Tesco, Market Street, Whitworth	202	2.7	0.8	-1.9

7.78 Table 7.22 shows that two of Rossendale's three largest foodstores (Tesco, Rawtenstall and Tesco, Haslingden) are cumulatively trading at some £36m (-46%) below benchmark levels, whilst the other (Asda, Rawtenstall) is trading broadly in line with expectations (+£1m / +2%). This indicates that there are no qualitative issues concerning 'over-trading' in the major foodstores which serve Rossendale. Indeed, the seemingly weak performance of both of the Borough's Tesco foodstores does offer some cause for concern given their proximity and the fact that the retailer has demonstrated in recent years that it is willing to close underperforming stores. Should this be the case there would be a consequential impact upon competition locally.

7.79 Following the closure of the Co-op in Bacup, the Morrisons store on Lee Street seems likely to benefit from a marginal upturn in its performance as shoppers in the east of the Borough look to alternatives to meet their convenience retail needs. Table 7.22 already shows this facility to be trading relatively well compared to company average levels, with a turnover some £2.9m or 30% above benchmark. We would advise that the Council monitor this situation because, as the only real 'main' food shopping destination serving Bacup and the Whitworth Valley, the Morrisons store now has no real competition of a comparable size and therefore has the potential to monopolise such shopping trips in the east of the Borough. Accordingly, there may be a qualitative argument to improve Bacup district centre's convenience goods offer over the longer-term through an appropriately scaled facility, in order to compensate for the loss of the Co-operative store and to improve local competition.

7.80 It is evident that Rawtenstall's Lidl foodstore is preforming particularly strongly, with the 2016 household shopper survey suggesting that it is trading at more than double (£7.5m) its company average turnover (£2.7m). This is considered to be reflective of the national picture, with the value end of the food retailing market particularly buoyant, and also the fact that this Lidl store represents the only discount foodstore serving Rossendale. However, with planning permission granted (Ref. 2016/0129) for the Borough's first Aldi foodstore in Rawtenstall and this facility currently understood to be under construction, there is no requirement for the Local Authority to plan for enhanced competition in this sector.

7.81 The remaining convenience retail facilities referenced in Table 7.22 can best be described as 'top-up' shopping facilities which serve the day-to-day needs of their respective local catchment populations. The table shows that these facilities are trading either just below or just above company average levels. As such, when taken as a whole, the performance of these smaller convenience stores is such that there does not appear to be any pressing requirement for a marked increase in this format of store to serve the administrative area.

7.82 In summary, with Table 5 of Appendix 4 demonstrating cumulatively that convenience retail provision in Rossendale is trading at £38.8m below anticipated levels and the above analysis highlighting that food retail provision is adequate to serve the needs of the population in terms of both consumer choice and competition, there is considered to be no pressing requirement to plan for additional convenience floorspace on the basis of qualitative need. This evidence also suggests that there are no gaps or deficiencies in food retail provision which need to be addressed.

7.83 The exception to this is in the case of Bacup, where the Local Authority should monitor the trading performance of the Morrisons store following the Co-operative's recent closure. This store now has no real competition of a comparable size and therefore has the potential to monopolise 'main' food shopping in the east of the Borough. Accordingly, there may be a qualitative argument to improve Bacup district centre's convenience goods offer over the longer-term through an appropriately scaled facility[16].

Comparison Goods

7.84 With regard to comparison goods we have concentrated on Rawtenstall, given the fact that the Borough's residents predominantly use this centre for the purchase of such items and the two district centres of Bacup and Haslingden cater for more localised needs. As explained in Section 4 of this report, Rossendale's facilities retain a relatively limited proportion of the comparison goods expenditure generated by the Borough's population (20.4%), with Rawtenstall accounting for just 13.0%. It should also be noted that this figure has reduced by 4.1% from the position identified in the household survey which was undertaken in 2008 (17.1%).

7.85 Furthermore, within some goods categories where it might be anticipated that a town of Rawtenstall's size may fare better, survey evidence suggests that it performs relatively poorly. For example, Rawtenstall's facilities attract just 7.4% the shopping trips for clothing and footwear originating from within the Study Area, 10.9% of the trips for toys, jewellery, books and DVDs/CDs, and 17% of trips for small household items. Evidence would therefore

[16] Subject to such a foodstore demonstrating compliance with the sequential and impact tests of the development management process (where occupying an edge or out-of-centre location).

suggest that the choice available in Rossendale is not sufficient to adequately retain comparison goods expenditure and that there are 'gaps' in existing provision.

7.86 One reason for this is that whilst Rawtenstall town centre benefits from a very strong independent comparison goods retail offer, representation by national multiple operators is considered to be low for a centre of this size. An important factor is that Rossendale is surrounded by larger, higher order centres such as Bury, Burnley, Rochdale and Accrington which already accommodate these national multiples. As such, the commercial demand to gain representation in Rossendale as well is more limited, particularly as Rossendale residents are already likely to be travelling to these higher order centres (and retailers) to undertake their comparison goods shopping.

7.87 The other key reason is that Rawtenstall is considered to historically have had units of insufficient scale and format to accommodate the business models of many comparison goods focussed national multiples. However, this position is changing with the introduction of New Hall Hey Retail Park, the first phase of which involves a terrace of four large format units, whilst the second (which is under construction) involves a further three and an accompanying restaurant.

7.88 It should be noted that comparison goods retailer TK Maxx, which forms part of Phase I of the New Hall Hey scheme, opened following the undertaking of the household shopper survey in February 2016 and as such the influence of this new addition to the Borough's retail offer is not reflected in our results. Given that TK Maxx represents the largest fashion focussed retail unit in Rossendale, it is anticipated that it has had some positive impact on the Borough's ability to retain such comparison goods shopping trips. It has also evidently improved local consumer choice within this goods sector.

7.89 With some 1,493 sq.m (GIA) of modern, comparison goods floorspace remaining unlet as part of Phase I of the New Hall Hey scheme and a further 743 sq.m (GIA) available as part of the forthcoming Phase II, it is not considered that the planning authority needs to take any urgent action through their forthcoming plan to address a qualitative need for an improved comparison goods offer in the Borough. The existing and future floorspace proposed at New Hall Hey is considered to have the potential to attract the type of national multiples which are capable of improving the Borough's market share over the short to medium-term.

7.90 In terms of future comparison goods provision above and beyond that already approved and constructed at New Hall Hey; where need does arise, in the first instance this should be provided within Rawtenstall town centre's Primary Shopping Area, in accordance with the requirements of national planning policy.

8.0 Leisure Needs in Rossendale

8.1 The approach to the assessment of quantitative need in the leisure market necessarily departs from the Study's retail methodology for a number of reasons, including the fragmentation of the market and the limited availability of data. However, the household survey undertaken to inform the Study asked respondents questions about their use of various leisure and recreational facilities and, through reference to market share, a view can be formed as to how the Study Area, and specifically Rossendale, currently meets the need of its population in relation to a range of leisure sectors.

8.2 The analysis focuses in particular on the needs for cinema and ten-pin bowling uses within Rossendale, as these uses would require a site of significant size that may need to be proactively planned for through the development plan process. In contrast, leisure uses such as bars, pubs, restaurants, cafes, galleries, theatres and health and fitness facilities are more readily able to respond to market demand and improvements in provision are usually delivered incrementally on a unit by unit basis.

8.3 National statistics have also been used in respect of the typical level of provision of specific types of facilities to assist judgement in respect of the likely future need for additional facilities in the administrative area. By reference to estimated increases in the Study Area population, this benchmarking exercise informs WYG's judgement in respect of the likely future need for additional commercial leisure facilities in the Study Area and specifically within Rossendale.

8.4 In considering future leisure provision, it should be noted that certain types of facility are often provided in locations proximate to large centres. Accordingly, it is anticipated that some of Rossendale's commercial leisure needs could only realistically be accommodated within or immediately surrounding Rawtenstall in the context of the Borough's centres, with all others considerably smaller and focussed on more localised catchments. The analysis that follows seeks to apportion future growth in commercial leisure provision on the basis of the current market share achieved by the Study Area, but this should be viewed with some flexibility in respect of how opportunities that come forward 'on the ground' can appropriately contribute to meeting identified needs.

8.5 For each leisure sector, it is considered that the current broad patterns of existing use, before then assessing the quantitative need for additional facilities.

Leisure Expenditure

8.6 The Study referred to Experian Micromarketer G3 data to obtain information on the Study Area residents' per capita expenditure on nine categories of leisure activities, which has been allowed to grow at the overall rate for leisure spending set out in Experian's Retail Planner Briefing Note 14. Table 8.1 below sets out the per capita expenditure at 2017 and the total expenditure estimated to be generated by the Study Area population across the nine leisure categories at 2017 and 2034. It should be noted that a breakdown of the expenditure growth rates for individual leisure categories is not provided by Experian and the assessment of growth in leisure spending within individual categories should therefore be treated as indicative only.

Table 8.1: Available Study Area Expenditure – Leisure

Leisure Sector	Per Capita Expenditure at 2017 (£ per person)	Total Expenditure at 2017 (£m)	Total Expenditure at 2034 (£m)
Cinemas	19	1.9	2.5
Live entertainment: theatre, concerts, shows	41	4.0	5.4
Museums, zoos, gardens, theme parks, houses and gardens	16	1.6	2.1
Admission to clubs, dances, discos, bingo	14	1.3	1.8
Social events and gatherings	7	0.6	0.9
Subscriptions to leisure activities	11	1.0	1.4
Alcoholic drinks (away from home)	257	25.1	33.6
Restaurants and cafe meals	496	48.4	64.8
Take away meals/snack food	276	26.9	36.1
Total	**£1,138**	**£110.9**	**£148.7**

8.7 At 2017, the per capita expenditure across the nine leisure categories is £1,138 per person, which equates to a leisure spend of £110.9m based on a Study Area population of 97,409 persons. In terms of specific leisure sectors, it is estimated that across the Study Area there is £1.9m of cinema expenditure (£19 per capita), £25.1m expenditure on alcoholic drinks (£257 per capita), £48.4m expenditure on restaurant and cafe meals (£496 per capita), £4.0m expenditure (£41 per capita) on live entertainment, such as trips to the theatre, and

£1.6m expenditure (£16 per capita) on visits to museums, zoos, gardens, theme parks, houses and gardens.

8.8 By 2034, it is forecast that the per capita expenditure within the Study Area across the nine leisure categories will be £1,433 per person. This assumes a leisure spending growth rate of +1.9% in 2016, +0.5% in 2017, +0.2% in 2018, +1.3% per annum between 2019 and 2023, an +1.5% per annum between 2024 and 2035, as set out in Experian's Retail Planner Briefing Note 14. This equates to a total leisure spend of £148.7m based on a Study Area population of 103,737 in 2034, and represents a growth in the overall leisure spend across the nine categories of £37.8m between 2017 and 2034. Spending within the restaurant and cafe meals category will see the largest increase in total expenditure between 2017 and 2034, of £16.5m, followed by spending on takeaway meals/snacks (£9.2m) and spending on alcoholic drinks (£8.5m).

Cinema

8.9 There are no purpose-built cinemas present within Rossendale; however, there are several facilities in the Borough which are understood to provide cinema screenings on a weekly or more occasional basis in theatres, community centres and social clubs, most notably: The Horse & Bamboo Theatre on Bacup Road, Waterfoot; and The Whitaker Museum & Art Gallery on Haslingden Road, Rossendale.

8.10 Question 32 of the household survey which informs this Study (see Appendix 3) seeks to establish where those residing within the Study Area most regularly visit the cinema. The results show that Bury attracts the majority of cinema goers (37.2%) with the town centre benefiting from a large, relatively new multiplex which was built as part of 'The Rock' retail and leisure development. The Reel Cinema on Manchester Road, Burnley attracts some 19.5% of cinema trips originating from the Study Area and is the second most popular destination, with a strong draw from Zones 1, 2 and 3 in particular. The Odeon on Sandbrook Way, Rochdale is also a notable destination for Study Area residents, attracting some 12.9% all cinema visits, whilst Manchester's various cinemas claim a further 11.1% of this trade. The survey results show that the remaining 30% of cinema visits are taking place in a variety of other surrounding centres including Accrington (8.6%), Bolton (3.8%), and Oldham (3.1%).

8.11 WYG estimates that the Study Area has a total estimated population of 97,409 at 2017, increasing to 103,737 at 2034. The Mintel Cinema Market report of November 2015 estimates that the UK population on average visits a cinema 2.7 times per annum and that each cinema screen attracts around 42,927 separate admissions. Applying these benchmark averages to the Study Area, it is estimated that the Study Area population could support 263,004 cinema admissions at 2017, increasing to 280,090 admissions at 2034. Based on the assumed number of visits required per screen, it is calculated that 6 screens could be supported at 2017, increasing to 6.5 screens at 2034 (i.e. 6 to 7 screens). These calculations are set out at the foot of the page in Table 8.2.

8.12 The benchmark assessment in Table 8.3 suggests that there could be a requirement for cinema screen provision in Rossendale; the Study Area currently accommodates no permanent purpose built cinema screens compared to the seven that the assessment suggests could be supported by the Study Area population over the Plan Period to 2034. It is evident from the findings of the household survey that much of the need for cinema trips is currently being met by facilities outside of the Study Area, most notably at the Vue Cinema, 'The Rock', Bury for the south of the Borough; the Reel Cinema on Manchester Road, Burnley for the north and, the Odeon Cinema on Sandbrook Way, Rochdale for the east. It is notable that all of these facilities are in relatively close proximity to the Study Area and indeed are actually closer for some existing residents; bearing in mind, for example, that Zone 4 contains the population of Ramsbottom which actually forms part of Bury's administrative area.

Table 8.2: Cinema Screen Requirements in Study Area

Year	Study Area Population	Number of Cinema Visits Per Person	Attendance	Number of Admissions Required to Support Screen	Potential Number of Screens Supported by Study Area
2017	97,409	2.7	263,004	42,927	6.1
2019	98,396	2.7	265,669	42,927	6.2
2024	100,658	2.7	271,777	42,927	6.3
2029	102,288	2.7	276,178	42,927	6.4
2034	103,737	2.7	280,090	42,927	6.5

8.13 Commercial cinema operators typically locate in urban areas and in easily accessible locations, which maximises the number of people within easy travelling distance of the cinema. Rural areas are more usually served by small independent and/or multi-purpose entertainment venues, as is already the case in Rossendale. It is therefore expected that any potential interest from commercial cinema operators in locating in Rossendale will be limited to Rawtenstall town centre, given its central and accessible location for the valley's surrounding population.

8.14 On the basis of the above analysis, WYG considers that it would be appropriate to plan for a modest multiplex facility to serve the Borough should the Local Authority have aspirations to see such a use form part of Rawtenstall town centre's future offer and evidence of commercial demand can be identified. It is understood that the Council and their development partner will be bringing forward future phases of the 'Spinning Point' town centre redevelopment scheme on land south-east of Bank Street over the medium to long-term. Accordingly, there is a parcel of land available within a central location in Rawtenstall town centre which is of a scale that could accommodate a cinema use. Its allocation for a mix of uses including an appropriately sized cinema, perhaps as part of a mixed-use facility, would ensure that such provision could come forward in the future should market demand be realised.

Ten Pin Bowling

8.15 Rossendale does not currently accommodate any ten pin bowling facilities and Question 39 of the household survey seeks to establish were Survey Area residents currently go to participate in this activity. It finds that the vast majority of the populace visit Bury (45.7%) which benefits from a bowling alley as part of 'The Rock' town centre retail and leisure scheme. Some 20% of the Study Area use 1st Bowl at Finley Gate, Burnley, whilst a further 12.1% visit Strike Ten Bowl on Sandbrook Way, Rochdale. It is notable that a similar proportion of Survey Area residents use the bowling facilities in these centres as they do cinema facilities (78.4%), reflecting the fact that these two leisure activities are often found alongside one another.

8.16 In terms of the expected benchmark level of provision, it is noted that the Mintel Tenpin Bowling report of May 2014 identified that there were 5,617 bowling lanes across the UK in 2014. Given that the UK population at 2014 was approximately 64.6 million (as identified by the Office for National Statistics), this equates to one lane for every 11,500 persons. It is again estimated that the Study Area has a population of 97,409 at 2017, increasing to 103,737 at 2034. Based on the assumed benchmark identified above, it is calculated that 8 ten pin bowling lanes could be supported by the Study Area population at 2017, increasing to 9 lanes at 2034.

Table 8.3: Ten Pin Bowling Requirements in Study Area

Year	Study Area Population	Typical Population Required to Support One Ten Pin Bowling Lane	Potential Number of Ten Pin Bowling Lanes Supported Within Study Area
2017	97,409	11,500	8.5
2019	98,396	11,500	8.6
2024	100,658	11,500	8.8
2029	102,288	11,500	8.9
2034	103,737	11,500	9.0

8.17 Notwithstanding the above, the total number of ten pin bowling facilities in the UK has remained stable in recent years and the lanes requirement identified is relatively modest compared to the size of most modern bowling facilities. It is therefore suggested that the Council could undertake soft market testing to determine the level of operator interest for this type of facility in Rossendale and to establish whether it is appropriate for the local authority to plan for additional ten pin bowling provision in the period to 2034.

8.18 It is considered that Rawtenstall would provide the most suitable location for the delivery of a new ten pin bowling facility in Rossendale. The town is the most popular destination within the Study Area for visits to restaurants, pubs and bars (as established by Questions 33 and 34 of the household telephone survey respectively). The delivery of a ten pin bowling alley in Rawtenstall would consolidate and compliment the town's existing leisure offer and likely assist in improving the overall offer of the town, particularly in respect of its evening economy. Work could be undertaken as part of the soft market testing exercise to establish the locational requirements of operators of a ten pin bowling facility.

8.19 In any case, should a planning application for a ten pin bowling development be forthcoming, it is recommended that the proposed development is judged on its own merit in accordance with relevant town centre planning policy at the time of the application's submission.

Indoor Sports or Health and Fitness

8.20 Question 30 of the household survey found that 26% of respondents visit indoor sports and health and fitness centres. Those questioned were also asked which centre or facility they last visited for indoor sports or health and fitness activity (Question 31). A large number of different responses were provided to this question, although cumulatively it was found that some 59.4% of participants are using sports facilities within the Rossendale authority area. Of these, some of the more popular destinations identified included the Pioneer Health Studio, River Street, Bacup (10.9%), Marl Pits Leisure Centre, Newchurch Road, Rawtenstall (4.5%), and the Adrenaline Centre, Helmshore Road, Haslingden (2.7%).

8.21 It is noted that Rossendale's two largest indoor leisure facilities, Marl Pits Leisure Centre in Rawtenstall and The Adrenaline Centre in Haslingden, are run by Rossendale Leisure Trust (a non-profit social enterprise) on behalf of Rossendale Borough Council. The Leisure Trust state that over 500,000 customers per annum use their two facilities, whilst a further 500,000 local residents participate in their school and community outreach programmes.

8.22 Alongside the sports, health and fitness offer provided by Rossendale Leisure Trust, the Borough also benefits from a wide range of smaller facilities run by independent and regional operators. This includes: the Riverside Health Club and Kane's Gym (Rawtenstall), Pioneer Health Studio (Bacup), T1 Health and Fitness and The Body Temple Gym and Fitness Centre (Waterfoot), Whitworth Leisure Centre (Whitworth) and Fit4Life Health and Fitness (Haslingden). It is noted that larger-format multiple health and fitness centres such as Pure Gym, Fitness First and Total Fitness and are not represented in Rossendale. However, this is not necessarily considered to raise issues from a qualitative perspective given the strength of the Borough's independent offer.

8.23 In summary, the above analysis has highlighted that the majority of those within the Study Area who visit indoor sports, health and fitness facilities use the provision provided within the Rossendale authority area. From an audit of available facilities, it is also evident that this offer is appropriately distributed throughout Rossendale's key settlements (likely a reflection of consumer demand) and as such from a quantitative and qualitative perspective it can be said that Rossendale is relatively well provided for in terms of indoor health and fitness facilities. Accordingly, whist there does not appear to be a pressing need to allocate additional land for such leisure uses, it is considered that proposals for new indoor sports, health and fitness provision should be considered positively, provided that they are in accordance with the provisions of the development plan and national planning policy.

Restaurants

8.24 With regards restaurant uses, Question 30 of the household survey found that 69.2% of Study Area respondents visit restaurants, whilst Question 31 identified that 37.1% of participants last visited a restaurant in the Rossendale administrative area – which was higher than in any other authority area. Of these people, 19.6% used facilities in Rawtenstall, 5.0% visited Haslingden, 3.6% visited Helmshore and 2.3% Bacup.

8.25 Our health check analysis of Rawtenstall town centre (see Table 5.2) identified that, in terms of both the proportion of floorspace (11.2%) and number of units (16.7%), Rawtenstall falls below the national average for the provision of leisure service uses (including restaurants). From our fieldwork, the centre's independent restaurant offer appears to comprise some five establishments which cater for a variety of different tastes. This offer is considered to be broadly adequate for a centre of this size, although would benefit from improvement should the opportunity arise. One such opportunity may be the forthcoming phases of the 'Spinning Point' town centre redevelopment scheme. Should this provide an anchor leisure 'destination' for the centre then it is quite possible that this will stimulate growth in supporting services such as restaurants and in the town's evening economy more generally.

8.26 The district centres of Haslingden and Bacup also contain a handful of independent restaurants and this is to be expected given their more limited, more locally focussed catchments. Meanwhile, it is noted that the Borough's smaller local centres such as Whitworth, Crawshawbooth, Edenfield, Stacksteads, also contain restaurant provision. Accordingly, it is considered that Rossendale residents have adequate access to a well distributed restaurant offer and as such there are no acute quantitative deficiencies across the Borough as a whole.

8.27 Rosendale does not currently have any representation by national multiple restaurants; however, it is understood that planning permission was granted in July 2016 (Application Ref. 2015/0438) for a McDonald's restaurant on land north of the A682 to the west of Rawtenstall town centre. This will make a further contribution to the Borough's qualitative offer and there is potential for an additional multiple restaurateur to take space in phase II of the New Hall Hey scheme, with planning permission Ref. 2016/0129 making provision for a small Class A3 unit.

8.28 In summary, the household survey results have identified that Rossendale's restaurant offer holds the highest market share of visits undertaken by the Study Area populace. Meanwhile, our health check analysis of the Borough's various centres has identified an adequate distribution of restaurants catering for a variety of tastes. It has been noted, however, that Rawtenstall's offer would benefit from some quantitative improvements and this may be possible though the forthcoming phases of the Spinning Point town centre redevelopment scheme. Whilst there are currently no multiple restaurants in the Borough, permission has been granted for a McDonald's restaurant just east of Rawtenstall town centre. Given this evidence, there is no overriding quantitative or qualitative need to plan for additional restaurants to serve Rossendale outside of existing centres; however, further in-centre provision which would diversify the current offer, particularly in Rawtenstall town centre, should be supported where this accords with the provisions of the development plan and national planning policy.

Pubs, Bars and Night Clubs

8.29 Question 30 of the household survey identifies that 40% of the Study Area's populace visits pubs, bars and night clubs during their leisure time. Question 34 shows that 70.3% of such trips are to facilities which fall within the defined Study Area, with 43.4% taking place in Rossendale and the remainder in Ramsbottom (within Bury's administrative area). Rawtenstall was the most popular destination in Rossendale for visits to pubs, bars and night clubs with a market share of 21.7%, followed by Whitworth local centre (5.2%), Haslingden district centre (4.6%) and Bacup district centre (4.3%).

8.30 In terms of the Borough's existing provision, as highlighted in our health check assessment, Rossendale's centres benefit from a range of pubs, bars and nightclubs. In the case of Rawtenstall, perhaps the most famous is Fitzpatrick's Temperance Bar just south east of St Mary's Way. However, the centre also benefits from a range of other pubs and bars including Café Artisan, The Queens Arms, The Buffer Stops, and the Hop Micro Pub on Bank Street amongst others. At the time of the Retail Study's preparation it was also noted that there were two vacant bars available for re-occupation on Bacup Road.

8.31 There is evidence that Haslingden has benefitted from the national trend which has seen a growing appetite for food and drink focussed leisure destinations. For example, it is noted that a number of former retail units on Deardengate have been converted to small bars (i.e. Room D and The Live Lounge) over the past 12 months or so. These bars are accompanied by more traditional pubs in the form of The Black Bull and The Commercial Hotel. In Bacup the offer is limited to more traditional pubs such as the New Inn, Little Queens and the British Queen.

8.32 In summary, Rossendale is considered to be relatively well served by traditional pubs and, in the case of Rawtenstall and Haslingden in particular, by more modern independent bars which diversify this leisure offer. Accordingly, it is not considered that there is any clear quantitative or qualitative justification to plan for additional facilities to serve the Borough's centres. Notwithstanding this, it is considered that further facilities to support the evening leisure economies of Rossendale should be supported where these are in line with local and national planning policies.

8.33 It is also important to ensure that any pubs or bars proposed do not impact negatively on the overall attractiveness of the centre, for example through the creation of a cluster of frontages which are largely inactive during the daytime. This has happened to some extent on parts of Bacup Road in Rawtenstall. Accordingly, the integration of night-time uses with the wider offer of the Borough's centres represents an important consideration for the Council be this through the preparation of future policies or the development management process.

Museums, Art Galleries and Cultural Facilities

8.34 In terms of museums and art galleries, Rossendale benefits from being the home to the Whitaker Museum and Art Gallery, which is located on Haslingden Road just outside Rawtenstall town centre. The household survey found that 25.7% of the Study Area's residents visited this facility on their last trip to a gallery / museum, with only the offer of Manchester (41.0%) attracting more. This is considered to represent a strong performance from this Rawtenstall visitor attraction, given the size of the facility and the competing offer available elsewhere in the region.

8.35 The only other museum or gallery of particular scale within Rossendale is the Helmshore Textile Museum (Helmshore). However, this closed to the public in September 2016 with

Lancashire County Council unable to afford to run the facility. Whilst it is understood that negotiations are ongoing to with the County Council to see the facility re-opened in the future, at the time of writing it remained closed.

8.36 In summary, given the relatively limited size of the authority area, it is considered that Rossendale is relatively well served by museums and art galleries given the offer provided for by The Whitaker Museum and Art Gallery. The re-opening of the Helmshore Textile Museum would clearly be of benefit to the Borough's wider offer and mechanisms to enable this to take place should be explored further with the County Council. In terms of the delivery of additional cultural facilities, whilst there is not an acute identified need to improve these over the plan period in Rossendale, further provision which would diversify the current offer should be supported where this accords with the provisions of the development plan and national planning policy.

Theatres and Performing Arts

8.37 Question 30 of the of the household survey found that 40.6% of the Study Area visits theatres, whilst Question 37 identifies that 15.6% of such visits are to facilities in the Rossendale area. Whilst the vast majority of the Study Area appears to travel to Manchester in order to vest the theatre (55.2%) this is largely to be expected given that this city benefits from by far the strongest offer in the region.

8.38 In terms of theatre provision in Rossendale, in quantitative terms this is actually very strong given the size of catchment. For example, the Borough benefits from the Royal Court Theatre in Bacup, The Horse and Bamboo Centre in Waterfoot, and the New Millennium Theatre in Waterfoot. The largest of these venues by some distance is the Royal Court Theatre in Bacup, which benefits from some 489 seats. These facilities cater for performances by a range of local performing arts groups, the strength of which again is beyond that which would be expected for a Borough the size of Rossendale. A few examples of the performing arts schools and groups in the area include the McCaw School of Dance in Haslingden, the Rossendale Dance & Drama Centre in Waterfoot, Stage Door School for Performing Arts in Rawtenstall, Cottonshed theatre company in Haslingden, the White Horse Project in Waterfoot, and the Valley Academy in Crawshawbooth.

8.39 Accordingly, Rossendale would appear to be particularly well catered for in terms of local theatre, dance and performing arts groups / schools. The Borough also benefits from at least three theatre facilities, with the Royal Court Theatre in Bacup the largest with a capacity of 489 seats. In our view, an important objective for the Local Authority is to recognise the importance of performing arts to the Rossendale's future leisure provision, given the natural strengths that the Borough appears to have in this sector. Accordingly, proposals for new theatre provision should be supported where they are in accordance with the provisions of local and national policy.

8.40 In order to help develop Rossendale's performing arts offer further, consideration could be given to the incorporation of multi-use performance space as part of a future phase of Rawtenstall's 'Spinning Point' town centre redevelopment project. This would provide the opportunity to showcase the Borough's strength in this leisure sector within its main centre and would also deliver a facility which could function as a hub for the various performing arts and theatre groups based in the area. It would have a positive effect on Rawtenstall's evening economy, and may stimulate growth in the town's restaurant and pub/bar provision.

Outdoor Active Sports

8.41 With regards outdoor active sports, the household shopper survey identifies that 30.2% of the Study Area population participates in these activities within facilities and attractions located in Rossendale. Examples of the Borough's offer in this leisure sector include Ski Rossendale in Rawtenstall, the Lee Quarry Mountain Bike Trails in Bacup, the 'Grip and Go' climbing facility and 'Laser Tag' at the Adrenaline Centre in Haslingden, the Rossendale Valley Sailing Club in Clowbridge. In addition, the Rossendale valley offers straightforward access to a wide expanse of surrounding countryside which provide significant opportunities to undertake outdoor health and fitness activities.

8.42 In terms of growth in this leisure sector, it is understood that Ski Rossendale, the Borough's most successful outdoor leisure attraction, secured planning permission for a £1.1m improvement in December 2016. The works involve the re-profiling of an existing slope, construction of a new access tower, two ramps (jumps) and an air-bag landing zone. The works will be completed in November 2017 and will cater for Great Britain's free-style skiing and snowboarding athletes. The enhancement of this key attraction evidently represents a significant boost for Rossendale's outdoor active sports offer in both quantitative and qualitative terms.

8.43 In summary, the population of Rossendale is considered to be relatively well served by outdoor active sports facilities and the Borough’s most popular such attraction is in the process of being improved. Accordingly, it is not considered that there is any clear quantitative or qualitative justification to plan for additional facilities to serve the Borough’s centres. Notwithstanding this, it is considered that further facilities to enhance the outdoor active sports offer of Rossendale should be supported where these are in line with local and national planning policies.

9.0 Tourism Needs in Rossendale

9.1 As recognised as part of the Borough's Core Strategy, the tourism sector has an important role to play in Rossendale's future prosperity and accordingly it is necessary to plan appropriately for this as part the forthcoming Local Plan. If Rossendale is to grow its existing visitor economy, it is necessary to understand the current economic position as well as the strengths and weaknesses of its tourism sector.

9.2 Accordingly, the following section provides a quantitative analysis of the latest available tourism data provided by 'Visit Lancashire' for Rossendale. We then turn to examine the Borough's tourism assets from a qualitative perspective, identifying key strengths and weaknesses. Finally, we provide a commentary on how the Local Authority could look to use the emerging Local Plan to positively influence the growth of the local tourist economy. It should be noted that this advice relates purely to the contribution that the land use planning system can make to tourism growth Rossendale and is not intended to represent a tourism strategy for the Borough, which would fall outside the scope of WYG's instruction.

Quantitative Analysis

9.3 In December 2016 Visit Lancashire provided WYG with 'STEAM' tourism economic impact data for Rossendale and the County of Lancashire as a whole for 2015 (the latest full year available) in order that this can be drawn upon in the preparation of this study. The following section sets out the key statistics of relevance to Rossendale, drawing upon comparisons where available with the position at a County level and with surrounding Local Authority areas.

Visitor Numbers

9.4 With regards visitor numbers, Table 9.1 on the following page sets out the total number of visitors to Rossendale in 2014 and 2015 (in millions of people) and breaks this figure down into 'day visitors' and 'staying visitors'. For the purposes of STEAM data, 'staying visitors' encompasses all tourists staying overnight (for at least one night) whilst 'day visitors' are those visiting the area on a non-routine and non-regular leisure day trip from a home or holiday base.

9.5 The table below shows that Rossendale benefitted from a total of 1.31 m visitors in 2015, growth of 2% on the figure recorded in 2014 (1.28m). This increase was actually marginally stronger than that recorded at County level, with Lancashire as a whole seeing an uplift in visits of just 1.7%. Day visitors accounted for 1.17m (90%) of the total tourist visits recorded in Rossendale in 2015, whilst staying visitors accounted for the remaining 0.13m (10%). The proportional split between 'day' and 'staying' visitors contrasts to that recorded at County level, were a higher 12.5% stay overnight and lower 87.5% are day visitors. This may be reflective of the availability of accommodation in the Rossendale area. Notwithstanding this, the 2.4% growth witnessed in those staying overnight in Rossendale between 2014 and 2015 was significantly higher than the County position, where growth was just 0.1% over an equivalent period.

Table 9.1: Rossendale Visitor Numbers 2014 to 2015

Types of Visitor	Visitors 2014 (millions of people / %)		Visitors 2015 (millions of people / %)		Variance (%)
Day Visitors	1.15	90%	1.17	90%	2.0%
Staying Visitors	0.13	10%	0.13	10%	2.4%
Total Visitor Numbers	**1.28**	**100%**	**1.31**	**100%**	**2.0%**

9.6 Drawing upon total visitor numbers, the STEAM data shows that Rawtenstall's 1.31m visits in 2015 generated a total of 1.50m 'visitor days' spent in the Authority area, an increase of 2.1% on the figure recorded in 2014 (1.47m). This figure is actually slightly higher than the increase witnessed between 2014 and 2015 at a County level (+1.8%), thus indicating a positive performance for the Borough. However, of note is the fact that 'staying visitors' accounted for just 0.33m or 22% of the total 'visitor days' recorded in Rossendale in 2015, compared to 31% witnessed at a county level. Again, this represents further evidence that Rossendale's tourist economy is currently weighted more towards the day visitor than it is those wishing to stay overnight.

Accommodation Stock

9.7 The STEAM data also provides figures for Rossendale's total stock of overnight visitor accommodation and this information is set out in Table 9.2 below. For the purposes of the analysis, 'Serviced Accommodation' includes hotels, guest houses, B&Bs and inns, whilst 'non-serviced' accommodation includes self-catering properties such as houses, cottages, chalets and flats, as well as camping, caravans and hostels.

Table 9.2: Rossendale Accommodation Stock 2014 to 2015

Types of Accommodation	Accommodation 2014 (no of beds / %)		Accommodation 2015 (no of beds / %)		Variance (%)
Serviced	204	76%	204	76%	0%
Non-Serviced	64	24%	64	24%	0%
Total Accommodation	**268**	**100%**	**268**	**100%**	**0%**

9.8 Table 9.2 shows that in 2015 there were a total of 268 'beds' within Rossendale's stock of visitor accommodation, 204 (76%) of these formed part of 'serviced' accommodation, whilst the remaining 64 (24%) were non-serviced. The table shows that there was no growth in accommodation provision in the Borough between 2014 and 2015.

9.9 Our observation on the above data is that Rossendale's provision of visitor accommodation is particularly weak, given the 1.28m tourist visits that the Borough receives per annum. In fact, if it is assumed that all 268 beds are occupied on each day of the calendar year (268 x 365) the maximum number of visitors that could theoretically be served is 97,820, some 36,000 fewer than are recorded to have stayed overnight in Rossendale in 2015. Whilst this calculation is relatively crude, it serves to illustrate that the number of beds available throughout Rossendale's accommodation provision would appear to fall well short of current and indeed future requirements.

9.10 It is also noted that STEAM state that there are an estimated 75,000 serviced accommodation 'beds' in Lancashire as a whole, meaning that Rossendale's contribution accounts for less than 0.3% of the total. This is despite the Borough attracting some 2% (1.31m) of all of tourists visiting Lancashire. This imbalance is again reflective of the fact that tourist accommodation does not appear sufficient to meet Rossendale's existing or future needs.

Economic Impact

9.11 STEAM apply expenditure data to total visitor numbers in order to estimate the 'Total Economic Impact' of tourism in an area. This expenditure comprises visitor spending on the likes of accommodation, food and drink, recreation, shopping and transport. However, STEAM also make an allowance for 'indirect and induced' spending in addition to the identified direct visitor expenditure, to account for spin-off trade associated with the local tourist economy.

Table 9.3: Rossendale Economic Impact of Tourism 2014 to 2015

Economic Impact	2014 (£m / %)		2015 (£m / %)		Growth (£m / %)	
Day Visitors	37.79	74%	38.97	74%	1.17	3.1%
Staying Visitors	13.29	26%	13.75	26%	0.46	3.4%
Total Economic Impact	**51.08**	**100%**	**52.71**	**100%**	**1.63**	**3.2%**

9.12 Table 9.3 shows that the 'total economic impact' of visitors to Rossendale in 2015 was £52.71m, with £38.97m (74%) derived from day visitors and the remaining £13.75m (26%) provided by those staying overnight. Total Economic Impact grew by £1.63m (or 3.2%) from the position in 2014, with the contribution by day visitors increasing by £1.17m (3.1%) and the contribution of staying visitors increasing by £0.46m (3.4%).

9.13 When 'Total Economic Impact' is divided by the number of visitors it is possible to establish how much on average each visitor brings into Rossendale's tourism economy; in terms of day visitors, staying visitors, and all visitors. The findings of this exercise are illuminating, in that whilst each visitor in 2015 brought on average £40.33 into the local economy, there was a considerable difference between the value generated by day visitors and staying visitors. The 1.17m 'day visitors' contributed some £38.97m in 2015, or £33.22 per person (per day). However, according to the STEAM model, the 134,000 'staying visitors' collectively brought £13.75m into the local economy or £102.59 per person (per day). Accordingly, 'staying visitors' were more than three times more valuable to the local economy (per day) than 'day visitors', but made up just 10% of the total attracted to Rossendale.

9.14 This position is reflected at a County level, with the STEAM model showing that across Lancashire as a whole 'staying visitors' contributed on average £77.46 per person (per day) to the local economy, whereas 'day visitors' contributed £33.23. Staying visitors were therefore more than twice as valuable. This difference is not particularly surprising when it is considered that a staying visitor will naturally need to spend more than a day visitor on the likes of accommodation, food, and drink. They are also likely to spend more on shopping and recreational activities, given the additional time they have to spend in the area. All such expenditure is factored into the 'total economic impact' figure.

9.15 In summary, this analysis of the economic impact of visitors has demonstrated that whilst the tourist economy in Rossendale appears to be on the rise, the Borough is undoubtedly missing out on more valuable 'overnight visitors' who spent on average three times more per person (per day) than 'day visitors' to the area in 2015. This provides further evidence that a lack of overnight tourist accommodation in Rossendale may be a barrier to growth in this sector over the long term.

Economic Impact by Authority Area in Lancashire

9.16 Having examined the total number of visitors to Rossendale and their economic impact, it is relevant to benchmark the Borough's performance against the rest of Lancashire in the equivalent year of 2015. This information, which draws upon STEAM data, is set out in Table 9.4 below.

Table 9.4: Distribution of Visitor Numbers and Total Economic Impact by Authority Area 2015

Lancashire Authority Area	Economic Impact (%)	Economic Impact (£m)	Visitor Numbers (%)	Visitor Numbers (Millions)
Blackpool	36%	£1,366.3	26%	17.0
Lancaster	11%	£428.9	11%	7.2
Wyre	9%	£330.4	7%	4.6
Preston	8%	£289.0	10%	6.7
Fylde	6%	£222.0	5%	3.1
Ribble Valley	5%	£206.4	6%	3.8
Blackburn with Darwen	4%	£159.7	6%	4.1
Chorley	4%	£167.7	6%	3.6
South Ribble	4%	£150.9	5%	3.2
West Lancashire	4%	£142.7	4%	2.7
Burnley	3%	£104.9	4%	2.5
Pendle	3%	£106.0	4%	2.6
Hyndburn	2%	£78.5	3%	1.9
Rossendale	1%	£52.7	2%	1.3
Total	**100%**	**£3,806.2**	**100%**	**64.4**

9.17 Whilst our analysis in this section has highlighted that Rossendale's tourist economy has shown signs of improvement between 2014 and 2015, Table 9.3 highlights that the Borough drew the fewest visitors of all the Lancashire Authority areas in 2015, and also benefitted from the lowest 'Total Economic Impact'. Having interrogated the data, it is also evident that in terms of the economic impact per visitor (i.e. 'Economic Impact' divided by 'Visitor Numbers') Rossendale is one of the weakest performers. This average is considered to be an important indicator because it provides further evidence that perhaps Rossendale is currently failing to maximise the economic benefits from those who do choose to visit the Borough.

9.18 Notwithstanding this, Table 9.3 should not necessarily be viewed too negatively and needs to be put into context. For example, Rossendale is one of Lancashire's smaller Authority areas both in terms of population and geographic area and as such it will inevitably attract fewer visitors than some of the County's larger Boroughs. We have also provided clear evidence that 'overnight' visitors spend considerably more than 'day' visitors and as such those Boroughs which have historically attracted holidaymakers (i.e. Blackpool, Wyre and Fylde) will inevitably capture a greater amount of expenditure per person – improving their total economic impact value.

9.19 What the table does emphasise, however, is that there is a significant opportunity for Rossendale to grow its local economy through the promotion of its tourism sector, although there is evidently considerable work to be done in this regard. From a land use planning perspective, one important contribution that could be made is the promotion of supporting uses, such as overnight accommodation, through the policies of the forthcoming Local Plan. Our quantitative analysis has provided clear evidence that attracting a greater proportion of 'staying' visitors is a means of maximising the economic benefits of those who do choose to visit the Rossendale area.

Qualitative Assessment

9.20 Table 9.5 on the following page provides an overview of some of the key tourist attractions in the Rossendale area.

Table 9.5: Rossendale Visitor Attractions

Attraction Type	Name / Location	Description
Railway / Transport Attraction	East Lancashire Railway, Rawtenstall	Heritage railway which provides steam train trips between Rawtenstall and Bolton Street station in Bury. The Railway provides experience days based on seasonal events and caters for school trips. A café is provided at the Bury station whilst the Rawtenstall station benefits from a small pub.
Outdoor active sports	Ski Rossendale, Rawtenstall	Dry Ski Slope catering for skiing and snowboarding. The facility offers lessons and caters for children's parties, groups, etc.
Outdoor active sports	Lee Quarry and Cragg Quarry mountain bike trails, Bacup	Purpose built mountain biking venue. Lee Quarry - 10km mountain bike trail including two pump trails and numerous cycle trails sections. Cragg Quarry – 6.5km mountain bike trail.
Museum / Art Gallery	The Whitaker Museum and Art Gallery, Rawtenstall	Multi-use cultural facility providing museum, art gallery, film screenings, gift shop, café, demonstrations and other events.
Museum	Bacup Natural History Society & Museum, Bacup	Small museum focussed on local history containing various domestic, industrial, religious and military artefacts as well as books, newspaper, photography archives.
Museum	Whitworth Heritage Museum, Whitworth	Small local museum containing a library of documents relating to Whitworth and a collection of historic photographs from the area.
Museum	Lamberts Footwear Museum, Waterfoot	Small museum focussed on the local footwear industry.
Interactive Farm	Animal Quackers Farm, Bacup	Interactive 'petting farm' providing guided farm tours. Also caters for school visits and children's parties, whilst providing internal/external play areas, café.
Interactive Farm	Cronkshaw Fold Farm, Helmshore	Interactive farm and education centre. Providing guided farm tours, toddler 'petting' experiences, environmental activities, children's parties and school visits.
Artwork	Halo Panopticon, Haslingden	Local hilltop sculpture in a landscaped setting with surrounding footpaths.
Artworks / Walk	Irwell Sculpture Trail, Bacup	33-mile trail between Bacup to Salford which showcases over 70 artworks.
Visitor Centre	Clough Head Visitor Centre, Grane Road, Haslingden	Visitor centre providing information on local landscape, heritage and wildlife. Focus on local and natural history in and around Grane Valley.

Attraction Type	Name / Location	Description
Art Gallery	See Gallery Studio, Oddfellows Hall, Crawshawbooth	Local art gallery showcasing both local and national works.
Factory Tours	The Fudge Village, Whitworth	Specialist local food maker. Factory tours for groups and schools (by appointment only), factory shop and café.
Walking Routes	Various locations throughout the Borough	Well known routes include Rossendale Way, Rossendale Shoe Trail, Landgate and Moss Quarry, Mary Towneley Loop, The Pennine Bridleway.
Water Sports	Whitworth Water Ski Centre, Cowm Quarry, Whitworth	Water ski centre providing lessons and also home to a local club. Site includes pro shop, clubhouse, and residential facilities.
Water Sports	Rossendale Valley Sailing Club, Clowbridge	Sailing, windsurfing and powerboating opportunities with tuition available.
Markets	Rawtenstall Farmers Market, Rawtenstall	Town Centre farmers market, held on the last Sunday of each month.
Markets	Traditional outdoor markets in Rawtenstall, Bacup and Haslingden	Traditional outdoor markets.
Indoor Leisure Activity	Grip and Go, Adrenaline Centre, Haslingden	Specialist indoor climbing facility at the Adrenaline Centre in Haslingden.
Indoor Leisure Activity	Laser Tag, Adrenaline Centre, Haslingden	Specialist indoor laser tag facility at the Adrenaline Centre in Haslingden.

9.21 The above table demonstrates that Rossendale benefits from a wide variety of tourist attractions which cater for a range of tastes, interests and age groups. Of particular importance is considered to be the outdoor active sports sector, with Ski Rossendale the North-West's premier dry slope skiing centre and Rossendale's most successful outdoor leisure attraction.

9.22 The facility secured planning permission for a £1.1m improvement in December 2016. The works involve the re-profiling of an existing slope, construction of a new access tower, two ramps (jumps) and an air-bag landing zone. The works will be completed in November 2017 and will cater for Great Britain's free-style skiing and snowboarding athletes. The enhancement of this key attraction evidently represents a significant boost for Rossendale's outdoor active sports offer in both quantitative and qualitative terms.

9.23 Other 'outdoor active sports' attractions of note in the Borough include the Lee and Cragg Quarry mountain bike trails in Bacup, which have witnessed significant investment over the past decade in order to create one of the region's most successful specialist mountain biking routes. It is considered that there may be scope to build on the success of this attraction through the delivery of appropriate supporting facilities such as a café, bike maintenance centre, and appropriately scaled visitor accommodation. Rossendale's various walking routes (including the Irwell Sculpture Trail) and two water sports centres add further to this outdoor leisure offer.

9.24 Rossendale's other key tourism sector relates to the Borough's heritage and cultural offer. The East Lancashire Steam Railway is one of the most popular heritage railways in the UK and of benefit not just as a visitor attraction, but as a means of bringing tourists into the heart of Rawtenstall where they can generate spin-off trade for surrounding town centre businesses. However, one particular observation is that the pedestrian linkages between the railway station and Bank Street (Rawtenstall's Primary Shopping Area) are not particularly strong, with the route itself of a relatively weak environmental quality and physical obstacles such as Bury Road and Bocholt Way present. Accordingly, it is considered unlikely at present that a significant number of East Lancashire Railway users make this journey on foot.

9.25 Alongside the East Lancashire Railway, Rossendale benefits from a number of heritage attractions including The Whitaker Museum and Art Gallery in Rawtenstall and a number of smaller local history museums in Bacup, Whitworth and Waterfoot respectively. However, one of the Borough's museums that has not been referenced in Table 9.3 is the Helmshore Textile Museum, which closed to the public in September 2016 following the withdrawal of funding by Lancashire County Council. Clearly the re-opening of this attraction would be beneficial to Rossendale's tourist economy, although the means of achieving this clearly falls outside the remit of this study.

9.26 Alongside the heritage and outdoor sports sectors, Table 9.3 identifies a range of other tourist attractions which, whilst smaller in scale, are considered to make an important contribution to the Borough's overall offer. This includes interactive farms, artworks, visitor centres, and art galleries. Furthermore, Rossendale's indoor leisure offer (Grip and Go, Laser Tag, etc.), retailers, restaurants, pubs/bars and performing arts facilities are considered to make a contribution to the area's tourism offer. However, as these uses have been examined in detail in Section 8 of this report, a detailed commentary upon them is not repeated here.

9.27 One point we would re-emphasise is that Rossendale's commercial leisure offer is somewhat lacking and the cinema screen assessment set out in Section 8 suggests that Rossendale could support a small multiplex facility, perhaps as part of a mixed-use scheme, subject to market demand being identified. Accordingly, subject to soft market testing, it may be appropriate to plan for such a cinema to serve the Borough and add another dimension to its tourism offer. This could be one of the uses considered as part of the further phases of Rawtenstall's 'Spinning Point' scheme.

9.28 In summary, this qualitative analysis has found that Rossendale benefits from a relatively wide ranging tourism offer, although its roots lie in the outdoor active sports and heritage sectors. The offer also appears to be appropriately distributed throughout the Borough, with attractions close to each of the key settlements and the potential for the area's defined centres to benefit from a degree of tourist expenditure. The following section seeks to provide a commentary on how the Council could look to use the emerging Local Plan to positively influence the growth of the local tourist economy.

Commentary on Tourism Land Use Needs

9.29 The main conclusions from the quantitative analysis of STEAM data is that whilst the tourist economy in Rossendale appears to be on the rise, the Borough is undoubtedly missing out on more valuable 'overnight visitors' who spent on average three times more per person (per day) than 'day visitors' to the area in 2015, but made up just 10% of all visitors. This was evident from our interrogation of the economic impact data and also from a qualitative perspective; STEAM identifies that Rossendale only has 268 visitor 'beds' throughout the Borough and these are actually disbursed throughout a considerable number of establishments, with no modern hotel space available.

9.30 Accordingly, a key recommendation of this report is that the Council seeks to prioritise the delivery of overnight accommodation through appropriate policies in the forthcoming Local plan. It is considered that not only is a quantitative improvement required but also a qualitative enhancement, with Rossendale's limited 'serviced' stock (i.e. hotels, guest houses, etc.) typically of a modest size and not necessarily in-keeping with modern consumer expectations. Accordingly, the Council should look to promote the delivery of a modern 'budget' hotel (i.e. Travelodge, Ibis, Premier Inn) in order to serve the Rossendale area.

9.31 National policy requires that 'main town centre' uses such as hotels are located in existing centres wherever possible, and as such any future land allocation should be reflective of this approach. It is understood that the Council and their development partner will be bringing forward future phases of the 'Spinning Point' town centre redevelopment scheme on land south-east of Bank Street over the medium to long-term. Accordingly, there is a parcel of land available within a central location in the town centre which is of a scale that could accommodate a budget hotel as part of a mix of uses. A mixed-use policy allocation including an appropriately sized hotel would ensure that such provision could come forward in the future, should market demand be realised.

9.32 In our view the introduction of a hotel would be of greatest value to the outdoor active sports sector, which the Council clearly recognises is key to growing Rossendale's tourist economy, given the existing strengths that the Borough has in this sector. With Ski Rossendale in the process of being improved and attractions such as the Lee and Cragg Quarry mountain bike trails becoming ever more popular, the ability for visitors to stay overnight (potentially in large groups) becomes ever more important. Indeed, the lack of such supporting infrastructure could be a significant barrier to future growth.

9.33 Turning to the other key tourism sector identified, heritage, our report has emphasised that the East Lancashire Railway plays a beneficial dual role as a key tourist attraction and means of bringing visitors into the heart of Rawtenstall. However, we believe that measures could be implemented to ensure that the journey from the railway station to the town centre is improved, as presently the pedestrian route is of a generally poor environmental quality and physical obstacles such as Bury Road and Bocholt Way impede accessibility.

9.34 In order to maximise the chances of this taking place, it is recommended that consideration is given to public realm improvements being promoted along St Mary's Way. This would be best addressed through a bespoke public realm strategy; however, changes could involve the removal of the pedestrian sub-way and metal fencing to the highway, in order make the route feel more expansive and attractive. The introduction of planters in the space created may help in this regard, whilst we also note a lack of directional signage on the route between the railway station and town centre and this could be relatively easily addressed.

9.35 Away from Rossendale's heritage and outdoor active sports sectors, this report has highlighted that the Borough's commercial leisure offer is somewhat lacking and an improvement which would also be beneficial to the tourism sector is the introduction of an appropriately scaled multiplex cinema. Section 8 has found that Rossendale's population could support a small facility and as such it may be appropriate to plan for this as part of a mix of uses which could feature in Rawtenstall's 'Spinning Point' scheme. This would add another dimension to the Borough's tourism offer and would also provide a boost to Rawtenstall's evening economy.

10.0 Summary and Conclusions

Key Findings and Recommendations – Retail Needs

10.1 The floorspace requirements identified in this Study are of some relevance to the determination of future planning applications for new retail floorspace in Rossendale. However, whilst the identified level of quantitative need has some relationship to the test of impact, 'need' is no longer a direct planning test when determining planning applications. Accordingly, the identified floorspace requirements should not be considered a 'cap' on appropriately located development. Instead, proposals that come forward should be assessed against the relevant policies of the NPPF and the development plan.

Convenience Goods – Quantitative Need

10.2 As set out in Section 7 of this report, the £111.8m of convenience goods expenditure generated by residents of the Study Area and claimed by destinations within the Rossendale area (including town centres, local centres, free-standing stores and so on) equates to a market share of 55.3%. This represents a decrease of 10.6% from the 65.9% convenience goods market share identified by the 2009 Rossendale Retail Study, which was based on a November 2008 household survey. The key reason for this is that there has been a significant uplift (+8.2%) in Ramsbottom's convenience goods market share over the past eight years, resulting in 18.4% fewer Zone 4 residents travelling north to use the convenience retail facilities within Rossendale.

10.3 Once inflow is allowed for (£9.4m) then the total derived turnover of existing convenience facilities in Rossendale at 2017 is £121.2m, which is significantly lower than the estimated benchmark turnover of the floorspace of £160.0m. A substantial expenditure deficit of -£38.8m at 2017 is therefore identified. This suggests that, taken cumulatively, existing convenience goods facilities in Rossendale are 'undertrading' when compared to their expected turnover. Overall, therefore, it appears that existing food retail provision in the Borough is considerably greater than that required to meet the existing quantitative need. This is not dissimilar to the conclusion reached by the authors of the 2009 Retail Study Update.

10.4 With regards the identification of future convenience goods capacity, WYG has 'rolled forward' the Study Area's current market share of 55.3% in order to identify the likely convenience goods floorspace required to meet future convenience goods retail needs. Even having allowed for factors such as population growth, forecast increases in convenience goods expenditure per capita, and the inflow of expenditure from residents outside the Study Area, it is not anticipated that a convenience goods expenditure surplus will be realised during the Local Plan period to 2034.

10.5 Once the £15.2m turnover of convenience goods commitments are taken account of, capacity for additional floorspace is identified to be -£54.0m in 2017. Whilst the positive effects of population growth and modest convenience goods expenditure increases improve the position slightly by the end of the Study Period (2034), negative capacity is still anticipated to stand at -£48.9m or -3,800 sq.m (maximum) in this final test year.

Table 10.1: Residual Quantitative Need for Additional Convenience Goods Floorspace in Rossendale Post Implementation of Commitments

Year	Surplus Expenditure (£m)	Commitments Turnover from Rossendale (£m)	Residual Expenditure (£m)	Min Floorspace Requirement (sq.m)	Max Floorspace Requirement (sq.m)
2017	-38.8	15.2	-54.0	-4,200	-6,300
2019	-38.3	15.2	-53.5	-4,100	-6,300
2024	-36.0	15.1	-51.1	-4,000	-6,100
2029	-34.8	15.2	-50.0	-3,900	-5,900
2034	-33.6	15.3	-48.9	-3,800	-5,700

10.6 Having taken account of all convenience retail commitments, Section 7 also shows that there will be no residual convenience goods capacity in the centres of Rawtenstall, Haslingden or Bacup over the study period to 2034.

Comparison goods – Quantitative Need

10.7 Turning to comparison goods, Section 7 of this report found that in 2017 existing facilities within the Rossendale area achieve a combined comparison goods turnover of £57.8m derived from the Study Area population. This equates to a market share of 20.4% of all comparison goods expenditure generated by residents of the Study Area, and represents a modest decrease in market share of -3.1% when compared to that established by the November 2008 household survey (23.5%) used to prepare the 2009 Retail Study Update. This reduction is not unexpected given that since the preparation of the previous study Bury town centre has witnessed the dramatic expansion of its comparison goods offer with the opening of 'The Rock' shopping centre, which has added some 55,000 sq.m of additional retail floorspace.

10.8 Rolling forward the current market share of 20.4% (assuming that the current comparison goods market share of facilities in Rossendale is maintained over the forecast period) and making an allowance for inflow of expenditure derived from residents outside of the Study Area (£4.5m), it is estimated there will be an expenditure surplus to support additional comparison goods floorspace within Rossendale of £3.8m at 2024, £9.6m at 2029, and then £16.9m in 2034, at the end of the Local Plan period.

10.9 However, as Table 10.2 below shows, commitments for new comparison retail floorspace will absorb all of the surplus expenditure arising in the period up to 2024. In the longer term, a comparison goods expenditure residual of £1.1m (maximum of 300 sq.m) is identified in 2029, increasing to £7.4m (maximum of 1,700 sq.m) in 2034, at the end of the Local Plan period. The identified surplus is lower than that derived in the 2009 Retail Study, primarily due to the fact that comparison goods growth rates have been revised downwards quite substantially over the past eight years.

Table 10.2: Residual Quantitative Need for Additional Comparison Goods Floorspace in Rossendale Post Implementation of Commitments

Year	Surplus Expenditure (£m)	Commitments Turnover from Rossendale (£m)	Residual Expenditure (£m)	Min Floorspace Requirement (sq.m)	Max Floorspace Requirement (sq.m)
2017	0.0	6.6	-6.6	-1,300	-2,200
2019	0.3	6.8	-6.5	-1,300	-2,100
2024	3.8	7.6	-3.9	-700	-1,100
2029	9.6	8.5	1.1	200	300
2034	16.9	9.5	7.4	1,000	1,700

10.10 A comparison goods expenditure analysis has also been undertaken on a centre by centre basis. In the case of Rawtenstall town centre, by 2029 a positive expenditure residual of £1.0m is identified increasing to £5.1m by the end of the plan period. This would be sufficient to support between 200 sq.m and 300 sq.m net comparison retail floorspace by

2029, and between 700 sq.m and 1,200 sq.m net comparison retail floorspace by 2034, depending on the type and format of non-food operators.

10.11 With regard to Haslingden, by 2029 a positive expenditure residual of £0.2m is identified increasing to £0.8m by the end of the plan period. This would be sufficient to support a maximum of 100 sq.m net comparison retail floorspace in the district centre by 2029, and a maximum of 200 sq.m net by 2034. Finally, in Bacup, a positive expenditure residual of £0.4m is identified in 2029 and would be sufficient to accommodate 100 sq.m of comparison goods floorspace net, based on the centre's existing market share. This increases further by the end of the Local Plan period (2034) to £1.1m, and would be enough to support between 200 sq.m and 300 sq.m net comparison goods floorspace.

Convenience Goods – Qualitative Need

10.12 With the Study demonstrating that convenience retail provision in Rossendale is cumulatively trading £38.8m below anticipated levels, and the above analysis highlighting that food retail provision is adequate to serve the needs of the population in terms of both consumer choice and competition, there is considered to be no pressing requirement to plan for additional convenience floorspace on the basis of qualitative need. Evidence gathered as part of this Study also suggests that there are no gaps or deficiencies in food retail provision which need to be urgently addressed as part of the plan making process.

10.13 One exception, which may merit review over the course of the forthcoming Local Plan period is Bacup, where the Local Authority should monitor the trading performance of the Morrisons foodstore on Lee Street following the Co-operative's closure in late 2016. Morrisons now has no real competition of a comparable size and therefore has the potential to monopolise 'main' food shopping in the east of the Borough. Accordingly, there may be a qualitative argument to improve Bacup district centre's convenience goods offer over the longer-term through an appropriately scaled facility, subject to evidence that it is 'overtrading' and there would be merit in improving local consumer choice and competition.

Comparison Goods – Qualitative Needs

10.14 With some 1,493 sq.m (GIA) of modern, comparison goods retail floorspace remaining unlet as part of phase I of the New Hall Hey scheme and additional floorspace coming forward as part of the forthcoming phase II development, it is not considered that the planning authority needs to take any urgent action through their forthcoming plan to address the qualitative need for an improved comparison goods offer in the Borough. The existing and future floorspace proposed at New Hall Hey is considered to have the potential to attract the type of national multiples which are capable of improving the Borough's market share over the short to medium-term.

10.15 It terms of future comparison goods provision above and beyond that already approved and constructed at New Hall Hey; where need does arise, in the first instance this should be provided within Rawtenstall town centre in accordance with the requirements of national planning policy.

Key Findings and Recommendations – Leisure Needs

10.16 The following key conclusions and recommendations were identified in relation to the following leisure uses.

Cinema

10.17 On the basis of the analysis set out at Section 8 of this report, WYG considers that it would be appropriate to plan for a modest multiplex facility comprising six to seven screens to serve the Borough, should the Local Authority have aspirations to see such a use form part of Rawtenstall town centre's future offer and evidence of commercial demand can be identified. It is understood that the Council and their development partner will be bringing forward future phases of the 'Spinning Point' town centre redevelopment scheme on land south-east of Bank Street over the medium to long-term. Accordingly, there is a parcel of land available within a central location in Rawtenstall town centre which is of a scale that could accommodate a cinema use. Its allocation for a mix of uses including an appropriately sized cinema, perhaps as part of a mixed-use facility, would ensure that such provision could come forward in the future should demand be realised through soft market testing (the appraisal of which falls outside the scope of this Retail Study).

Ten Pin Bowling

10.18 The Study Area does not presently benefit from a bowling alley and the quantitative analysis undertaken as part of Section 8 of this Report has calculated that, based on national averages, eight ten pin bowling lanes could theoretically be supported by the Study Area population at 2017, increasing to nine lanes at 2034. However, the total number of ten pin bowling facilities in the UK has remained stable in recent years and the lanes requirement identified is relatively modest compared to the size of most modern bowling alleys. The Local Authority could undertake soft market testing to determine the level of operator interest for this type of facility in Rossendale and to establish whether it might be appropriate to plan for ten pin bowling provision in the period to 2034. Should demand be identified, we would advise that this is focussed towards Rawtenstall town centre, where it would consolidate and compliment the existing leisure offer and likely assist in improving the centre's evening economy in particular.

Indoor Sports or Health and Fitness

10.19 From an audit of available facilities, it is evident that the Borough's sports offer is extensive and appropriately distributed throughout Rossendale's key settlements (likely a reflection of consumer demand) and as such from a quantitative and qualitative perspective it can be said that Rossendale is relatively well provided for in terms of indoor health and fitness facilities. Whist there does not appear to be a pressing need to allocate additional land for such leisure uses, it is considered that proposals for new indoor sports, health and fitness provision should be considered positively, provided that they are in accordance with the provisions of the development plan and national planning policy.

Restaurants

10.20 Our health check analysis of the Borough's various centres has identified an adequate distribution of restaurants catering for a variety of tastes. It has been noted, however, that Rawtenstall's offer would benefit from some quantitative improvements and this may be possible though the forthcoming phases of the 'Spinning Point' town centre redevelopment scheme. Whilst there are currently no multiple restaurants in the Borough, permission has been granted for a McDonald's restaurant just east of Rawtenstall town centre. Given this evidence, there is considered to be no overriding quantitative or qualitative need to plan for additional restaurants to serve Rossendale outside of existing centres; however, further in-centre provision which would diversify the current offer, particularly in Rawtenstall town centre, should be supported where this accords with the provisions of the development plan and national planning policy.

Pubs, Bars and Night Clubs

10.21 Rossendale is relatively well served by traditional pubs and, in the case of Rawtenstall and Haslingden in particular, by more modern independent bars which diversify this leisure offer. Accordingly, it is not considered that there is any clear quantitative or qualitative justification to plan for additional facilities to serve the Borough's centres. Notwithstanding this, it is considered that further facilities to support the evening leisure economies of Rossendale should be supported where these are in line with local and national planning policies.

10.22 It is also important to ensure that any pubs or bars proposed do not impact negatively on the overall attractiveness of the centre, for example through the creation of a cluster of frontages which are largely inactive during the daytime. This has happened to some extent on parts of Bacup Road in Rawtenstall. The integration of night-time uses with the wider offer of the Borough's centres represents an important consideration for the Council be this through the preparation of future policies or the development management process.

Museums, Art Galleries and Cultural Facilities

10.23 Given the relatively limited size of the authority area, it is considered that Rossendale is well served by museums and art galleries given the offer provided for by The Whitaker Museum and Art Gallery. The re-opening of the Helmshore Textile museum would clearly be of benefit to the Borough's wider offer and mechanisms to enable this to take place should be explored further with the County Council. In terms of the delivery of additional cultural facilities, whilst there is not an acute identified need to improve these over the plan period in Rossendale, further provision which would diversify the current offer should be supported where this accords with the provisions of the development plan and national planning policy.

Theatres and Performing Arts

10.24 Rossendale would appear to be particularly well catered for in terms of local theatre, dance and performing arts groups / schools. The Borough also benefits from at least three theatre facilities, with the Royal Court Theatre in Bacup the largest with a capacity of some 489 seats. In our view, an important objective for the Local Authority is to recognise the importance of performing arts to the Rossendale's future leisure provision, given the natural strengths that the Borough appears to have in this sector. Accordingly, proposals for new theatre provision should be supported where they are in accordance with the provisions of local and national policy.

10.25 In order to help develop Rossendale's performing arts offer further, consideration could be given to the incorporation of multi-use performance space as part of a future phase of Rawtenstall's 'Spinning Point' town centre redevelopment project. This would provide the opportunity to showcase the Borough's strength in this leisure sector within its main centre and would also deliver a facility which could function as a hub for the various performing arts and theatre groups based in the area. It would have a positive effect on Rawtenstall's evening economy, and may stimulate growth in the town's restaurant and pub/bar provision.

Outdoor Active Sports

10.26 Rossendale is well served by outdoor active sports facilities and the Borough's most popular such attraction, Ski Rossendale, is currently in the process of being improved through a £1.1m investment. Accordingly, it is not considered that there is any clear quantitative or qualitative justification to actively plan for additional facilities to serve the Borough's existing centres. Notwithstanding this, our advice is that further facilities to enhance the outdoor active sports offer of Rossendale should be supported where these are in line with local and national planning policies.

Key Findings and Recommendations – Tourism Needs

10.27 The main conclusions from the quantitative analysis of STEAM data is that whilst the tourist economy in Rossendale appears to be on the rise, the Borough is undoubtedly missing out on more valuable 'overnight visitors' who spent on average three times more per person (per day) than 'day visitors' to the area in 2015, but made up just 10% of all visitors. This was evident from our interrogation of the economic impact data and also from a qualitative perspective, with STEAM stating that Rossendale only has 268 visitor 'beds' throughout the Borough and our observations suggesting these are actually disbursed throughout a considerable number of establishments, with no modern hotel space available.

10.28 Accordingly, a key recommendation of this report is that the Council seeks to prioritise the delivery of overnight accommodation through appropriate policies in the forthcoming Local plan. It is considered that not only is a quantitative improvement required but also a qualitative enhancement, with Rossendale's limited 'serviced' stock (i.e. hotels, guest houses, etc.) typically of a modest size and not necessarily in-keeping with modern consumer expectations. Accordingly, the Council should look to promote the delivery of a modern 'budget' hotel (i.e. Travelodge, Ibis, Premier Inn) in order to serve the Rossendale area.

10.29 It is understood that the Council and their development partner will be bringing forward future phases of the 'Spinning Point' town centre redevelopment scheme on land south-east of Bank Street over the medium to long-term. Accordingly, there is a parcel of land available within a central location in the town centre which is of a scale that could accommodate a budget hotel as part of a mix of uses. A mixed-use policy allocation including an appropriately sized hotel would ensure that such provision could come forward in the future, should marked demand be realised. Such market demand could be established through a soft market testing exercise undertaken by a specialist commercial leisure agent.

10.30 Turning to the East Lancashire Railway, it is recommended that consideration is given to public realm improvements being promoted along St Mary's Way in order to maximise the potential for linked trips by those tourists arriving via this mode of travel. This would be best addressed through a bespoke public realm strategy, however, changes could involve the removal of the pedestrian sub-way and metal fencing to the highway, in order make the route feel more expansive and attractive. The introduction of planters in the space created may help in this regard, whilst we also note a lack of directional signage on the route between the railway station and town centre and this could be relatively easily addressed

Key Findings and Recommendations – Retail Hierarchy

10.31 Policy 11 ('Retail and Other Town Centre Uses') of the Core Strategy states that retail development, together with other town centre uses (including offices, leisure, arts, culture and tourist facilities) will be focused within the defined town, district and local centres; with major proposals directed to Rawtenstall and large schemes encouraged to locate in the district centres of Bacup and Haslingden. The policy establishes a retail hierarchy as follows:

- **Town Centre** – Rawtenstall
- **District Centres** – Bacup and Haslingden
- **Local Centres** – Waterfoot and Whitworth
- **Neighbourhood Centres** – Edenfield, Stacksteads, Helmshore and Crawshawbooth

10.32 Having regard to the field work undertaken as part of our health check assessment for each centre (see Section 5 of this report), WYG would suggest the following revisions to the local retail hierarchy:

- **Town Centre** – Rawtenstall
- **District Centres** – Bacup and Haslingden
- **Large Local Centre** – Waterfoot
- **Local Centres** – Whitworth and Crawshawbooth
- **Neighbourhood Parades** – Edenfield, Stacksteads, Helmshore and Facit

10.33 The first suggested change concerns Waterfoot. Whilst this is presently defined as a local centre alongside Whitworth, our health check analysis has identified that it has some three times the number of units (73) and more than two and a half times the amount of floorspace (7,784 sq.m) when compared to this local centre. Equally, Waterfoot is not of the same order as Haslingden (Rossendale's smallest district centre) which comprises some 107 units and 10,482 sq.m of floorspace devoted to 'main town centre' uses.

10.34 Given that Waterfoot's scale and offer is larger than that of Rossendale's other local centre, but remains smaller than its district centres, our advice would be to differentiate it from both via the introduction of a new level in the retail hierarchy of 'large local centre'. This would offer some recognition that Waterfoot plays a more prominent role in catering for the needs of Rossendale residents than smaller local centres. Elevating the centre may also help stimulate future investment, with our health check analysis identifying that intervention may be required in the future to tackle longstanding vacancies in some parts of Waterfoot.

10.35 It is proposed that Crawshawbooth is elevated from its present level as a 'neighbourhood centre' to that of a 'local centre'. This is again to reflect the scale and offer of this centre, compared to others in the Borough. For example, Crawshawbooth contains 33 units and some 2,636 sq.m of floorspace devoted to 'main town centre' uses, which is broadly comparable with Whitworth local centre's 25 units / 2,887 sq.m of floorspace. It is also noted that both play an equivalent role in serving the day-to-day needs of the local populace residing within their respective valleys. Accordingly, we are of the view that it is appropriate for both Whitworth and Crawshawbooth to be defined as 'local centres' in Rossendale's future retail hierarchy.

10.36 The final change proposed to Rossendale's retail hierarchy is that the remaining centres which are currently defined as 'neighbourhood centres' in the adopted Core Strategy (such as Edenfield, Stacksteads, Helmshore and Facit)[17] should be reclassified as 'neighbourhood parades'. The main reason for this change in title is that under the definition of a 'Town Centre' (which describes centres more widely) in Annex 2 of the NPPF, it is highlighted that *'small parades of shops of purely neighbourhood significance'* are not to be regarded as 'centres' in the same way that town, district and local centres are.

10.37 This is not to say, however, that it wouldn't be appropriate for the Local Planning Authority to support the retention and ongoing vitality and viability of neighbourhood parades through the retail policies contained within the forthcoming Local Plan. DCLG guidance such as *'Parades of Shops - Towards an Understanding of Performance & Prospects'* (June 2012) and *'Parades to be Proud of: Strategies to support local shops'* (June 2012) emphasises that these parades provide essential opportunities for day-to-day convenience shopping and service access and make an important contribution to maintaining 'sustainable communities'. Accordingly, whilst these centres may not have a formal standing in the local retail hierarchy in the same way that town, district and local centres do, they can still be regarded as having an important role to play in serving the day-to-day needs of local communities. Whilst it is unlikely that 'neighbourhood parades' would be considered 'centres' for the purposes of the sequential test, they could still be afforded some protection through the development plan due to their important local role and function.

Key Findings and Recommendations – Centre Boundary Definitions

10.38 In considering the Council's future retail strategy, we have also reviewed the boundaries of the town, district, and local centres as set out in the retail hierarchy proposed as part of this study. In seeking to define these boundaries we have had regard to the wording of Annex 2 of the NPPF which explains that:

- **Town Centre** – Comprises areas predominantly occupied by 'main town centre' uses within or adjacent to the Primary Shopping Area;
- **Primary Shopping Area** – Is the defined area within a centre where retail development is concentrated;

[17] Note, whilst Facit was not referenced in the Core Strategy, it was reviewed as part of the 2009 Retail Study and regarded as a centre of neighbourhood level significance.

- **Primary Frontages** – Include a high proportion of retail uses which may include food, drinks, clothing and household goods (within the Primary Shopping Area); and,
- **Secondary Frontages** – Provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses (within the Primary Shopping Area).

10.39 Annex 2 of the NPPF recognises that smaller centres may not have areas of predominantly leisure, business, and other main town centre uses adjacent to the Primary Shopping Area and therefore the delineation of such centres may not extend beyond a single boundary. The same principle applies to primary and secondary frontages, with these of more relevance to larger 'town' and 'city' centres - which have extensive Primary Shopping Areas - than smaller centres where it is not possible to differentiate between different commercial 'zones' within the Primary Shopping Area. Indeed, as explained below, we do not consider that any of the Primary Shopping Areas identified in Rossendale's centres comprise clear 'primary' and 'secondary' frontages, given their size.

10.40 Having visited Rossendale's town, district and local centres on a number of occasions whilst undertaking this Study we have identified what we consider to represent their respective 'centre boundary' (comprising all interrelated 'main town centre' uses) and their 'Primary Shopping Area' (encompassing the retail core). These boundaries are presented in plan form at Appendix 6 of the TCRLTS, whilst below we summarise the key changes from the boundaries set out on the Proposals Map which formed part of the Rossendale Core Strategy (2011).

- **Rawtenstall Town Centre –** In terms of the town centre boundary, this has been extended to encompass the Asda superstore off St. Mary's Way and the Tesco foodstore off Bocholt Way. Both of these foodstores represent 'main town centre' uses which are accessible from Rawtenstall and generate linked shopping trips with the centre. It is therefore appropriate to include them within the centre's boundary. The same can be said of the East Lancashire Railway Station, which represents important supporting transport infrastructure and is the gateway into Rawtenstall for many tourists. This too has therefore been included within the centre's boundary.

  In terms of the Primary Shopping Area, the key changes proposed include extending this to the north from Bank Street to include Rawtenstall market and the immediately surrounding retail uses. The rationale for this is that the market represents an important retail anchor and appeared to be a key footfall driver based on our observations when visiting the centre. The other suggested change to the Primary Shopping Area is the removal of the site of the former Valley Centre, given that this is currently occupied by temporary public realm, ahead of its future redevelopment as part of the Spinning Point scheme. We would advise that this area is instead demarked as a *'Future Primary Shopping Area Extension'*, in order to ensure that when the forthcoming phases of Spinning Point are realised, they are seen as providing for a natural extension to Rawtenstall's Primary Shopping Area and as such can be regarded as 'in-centre' development which need not demonstrate compliance with the sequential or impact tests (a supporting local planning policy should clarify this).

- **Bacup District Centre –** The main change proposed to Bacup's district centre boundary from the position set out in 2011's Core Strategy is an extension to the south to encompass the Morrisons foodstore on Lee Street, which was not operational at the time of the Core Strategy's preparation in 2011. In addition to this, we have also suggested that the Primary Shopping Area is extended to the south to encompass the retail units on King Street, Rochdale Road and Irwell Street, as well as the centre's new B&M Bargains store and public car park. The main reason for this is that during our visits to the centre this area, which contains predominantly retail uses, appeared to sustain the greatest level of footfall, largely because of the attraction of the B&M Bargains unit.

- **Haslingden District Centre –** Turning to Haslingden, we have advised only minor changes to the delineation of the centre's boundary, involving a reduction to the northern fringe to remove residential properties and modest extensions to the south and west, to include retail units which in our view form part of the centre's core offer. We have also suggested that Haslingden's Primary Shopping Area is extended to include the Nisa Extra foodstore on the eastern side of Deardengate as well as unit shops on Pleasant Street and Hindle Street, both of which immediately adjoin Deardengate on its eastern side. Finally, we have advised that several retail units on Backburn Road (opposite Bacup Market) are included within Haslingden's Primary Shopping Area, given that footfall within this part of the centre was particularly strong during our visits and the shops appeared to be performing well.

- **Waterfoot Large Local Centre** – Our advised centre boundary for Waterfoot largely reflects that set out within the 2011 Core Strategy. The only suggested amendment of note is the inclusion of the Horse and Bamboo theatre on Bacup Road, given its important role as a leisure attraction serving the Waterfoot area and the fact that it forms part of an existing parade of retail units which are already included within the centre's boundary. We have not sought to define a Primary Shopping Area for Waterfoot given its limited scale and role as a large local centre.

- **Whitworth Local Centre –** As a local centre containing some 25 units, our recommendation is that a single boundary is defined for Whitworth, containing all of its interrelated 'main town centre' uses. The approach adopted reflects the 2011 Core Strategy and indeed our advised boundary is broadly reflective of that currently set out on the adopted proposals map.

- **Crawshawbooth Local Centre –** Crawshawbooth was not defined as a local centre as part of the Rossendale Core Strategy. However, given that this is a recommendation of this Study, we have set out a suggested centre boundary for the Council's consideration as part of Appendix 6. As the appendix shows, the centre would have a linear form and would comprise some 33 units bounding Burnley Road.

Key Findings and Recommendations – Impact and Sequential Testing Thresholds

10.41 In accordance with the requirements of paragraph 26 of the NPPF, it is considered appropriate to identify thresholds for the scale of edge of centre and out of centre retail, leisure and office development which should be the subject of an impact assessment. In this regard, we note that Policy 11 of the Rossendale Core Strategy currently sets the following local impact testing thresholds for convenience and comparison good retail development:

- Rawtenstall Town Centre – 750 sq.m
- Bacup and Haslingden District Centres – 500 sq.m
- Elsewhere within the Borough – 200 sq.m

10.42 As a starting point, we would highlight that Policy 11 of the Core Strategy as currently worded is silent on the scale thresholds for edge and out of centre office and leisure developments which should be accompanied by an impact assessment. Accordingly, we would suggest that any future town centre policy is clear that the impact testing threshold applies equally to these main town centre uses, as required by Paragraph 26 of the NPPF.

10.43 Turning to the impact testing thresholds themselves, in light of the fact that no expenditure capacity has been identified for additional convenience goods floorspace to serve Rossendale over the plan period, and comparison goods capacity is also limited over the medium term, we have some concerns with the 750 sq.m threshold presently adopted for Rawtenstall. A retail unit of this scale could theoretically accommodate a national multiple food or non-food retailer with a potential turnover of several million pounds. Accordingly, it is important to ensure that such development satisfies the impact test, in order to safeguard that the vitality and viability if Rawtenstall town centre. In our view, based on the lack of capacity identified over the plan period, a threshold of 400 sq.m would be a more appropriate threshold for Rawtenstall moving forward, with development below this scale unlikely to result in an impact of such a magnitude that it would merit the application's refusal.

10.44 Turning to the district centres of Bacup and Haslingden, we would again raise concerns with the existing threshold of 500 sq.m. This Study has highlighted that Bacup's health is relatively fragile and the addition of 500 sq.m of retail floorspace within an edge or out of centre location therefore has the potential to result in 'significant adverse' impacts, dependent upon the end user. Accordingly, it will be important to carefully consider the implications of such a quantum of floorspace and indeed we would advise, based on the present circumstances, that an impact testing threshold of 300 sq.m is adopted in the case of both Bacup and Haslingden. Developments beneath this threshold, such as small multiple convenience stores, are unlikely to result in impacts that would have a material effect on the health of centres of this size.

10.45 With regards the 'large' local centre of Waterfoot and the local centres of Whitworth and Crawshawbooth, we are of the view that the existing threshold of 200 sq.m (which applies to everywhere else in the Borough) represents an appropriate level above which the impact test should be applied. This would mean, for example, that a 280 sq.m multiple convenience store (operated by the likes of Tesco, Sainsbury's, Co-op or similar) would need to be subject to the impact test but that smaller independent stores - which usually fall below this threshold - would not. In our experience, it will only generally be development of a scale greater than 200 sq.m which could lead to a 'significant adverse' impact, which could merit the refusal of an application for town centre uses in accordance with the provisions of paragraph 27 of the NPPF.

10.46 Finally, we would also comment that in reviewing Policy 11 of the Core Strategy we note that it states that *"proposals for new convenience retail floorspace of greater than 200 sq.m will* *be resisted outside of the defined Primary Shopping Area boundaries unless… under the sequential test a more appropriate site cannot be identified".* This policy could therefore be interpreted as making retail, leisure and office development which is less than 200 sq.m in size exempt from the sequential approach. The NPPF is clear that all main town centre proposals in edge and out of centre locations should be the subject of the sequential test and we would therefore advise that any replacement town centre policy in the forthcoming Local Plan is reflective of this.