

Celebrating
60
years

Pendle Retail and Leisure Capacity Study Final Report

Pendle Borough Council

31 March 2023

LICHFIELDS

LICHFIELDS

Lichfields is the pre-eminent planning and development consultancy in the UK

**Celebrating 60 years
of innovation in planning.**

[lichfields.uk](https://www.lichfields.uk)

© 2023 Nathaniel Lichfield & Partners Limited (trading as "Lichfields"), All Rights Reserved, is registered in England, no. 2778116.
Registered office at The Minster Building, 21 Mincing Lane, London EC3R 7AG.
Formatted for double sided printing.
Plans based upon Ordnance Survey mapping with the permission of Her Majesty's Stationery Office.
© Crown Copyright reserved. Licence number 10007707
65349/01/PW
26474455v1

Executive Summary

Lichfields has been commissioned by the Pendle Borough Council (PBC) to prepare an update of the Retail and Leisure Needs Capacity Study, in line with the National Planning Policy Framework (NPPF) relating to the need to ensure the vitality of town centres. PBC is currently preparing a new Local Plan and this Retail and Leisure Capacity Study update will inform its preparation. This update quantifies the need for additional floorspace for retail and leisure uses within Pendle in the short, medium and long term and makes policy recommendations.

Underlying trends

In response to the growth of home shopping and other trends, town centres have changed and diversified. The role of food/beverage, leisure and non-retail service sectors have increased. However, the shop vacancy rate in Pendle Borough remains relatively high. The recent decline in town centre is likely to be structural rather than cyclical and a more flexible approach to town centre uses is required. The implications of the cost of living crisis also endorse a cautious approach. Shopping behaviour will continue to change, and town centre will need to respond by providing a combined retail and leisure experience.

Hierarchy of centres

Pendle Borough has a well-established network of centres that serve their respective areas. The three designated Town Centres, Nelson, Colne and Barnoldswick have 120 or more retail/service premises and a reasonable mix of facilities, but Nelson and Colne are the only centres with a truly borough-wide catchment area. Local Shopping Centres are much smaller (around 40 to 50 units) and have a more limited range and choice of comparison goods shopping. Local Shopping Frontage have 11 or less units.

The town centre vacancy rate has increased and is significantly above the national average in Nelson, Brierfield and Earby. Continuing to identify the hierarchy of centres in future development plans is important in ensuring the vitality and viability of centres is maintained and enhanced. The network of centres should continue to be protected and enhanced to ensure appropriate accessibility to important facilities for all sections of the community and to ensure sustainable shopping patterns.

Meeting the Borough's needs

The NPPF states that local planning authorities should assess the quantitative and qualitative needs for land or floorspace for retail and leisure development over the plan period. When planning for growth in their town centres, local planning authorities should allocate a range of suitable sites to meet the scale and type of retail development needed. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability.

The combined floorspace projections (cumulative) for retail, food/beverage and commercial leisure/entertainment/cultural floorspace in 2030, 2035 and 2040 are summarised and rounded in the table below.

	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food/ beverage (sq.m gross)	Leisure/ cultural (sq.m gross)	Total (sq.m gross)
By 2030	-200	-400	700	700	800
By 2035	0	-200	1,000	1,000	1,800
By 2040	200	500	1,400	1,500	3,600

Long term floorspace capacity forecasts beyond 10 years are susceptible to unforeseen circumstances. Growth forecasts for expenditure and turnover are particularly uncertain and need to be carefully monitored, including the continued growth in home/internet shopping. Long term projections must be treated with caution and kept under review, particularly projections beyond 2035.

The combined total projection to 2040 is 3,600 sq.m gross which is less than the current amount of vacant shop floorspace in the Borough (about 12,000 sq.m gross). Based on a reasonable reduction in shop vacancy rates, reoccupied space could in theory accommodate all the projected need to 2040. However, there is likely to be a shift from retail space to food/ beverage and leisure/cultural uses, with vacant shop premises also converting to these uses. Not all vacant units will be suitable for conversion to leisure/cultural uses, therefore new development may be required to accommodate some new uses.

Future planning policy should seek to ensure new mixed use developments are flexible. The design and configuration of buildings should allow for the merger and sub-division of units, offering maximum flexibility to respond to changing operator requirements over the plan period.

The capacity projections in this update suggest there is no pressing requirement to allocate sites for major retail or leisure development to accommodate projected growth over the plan period. The priority in the short to medium term will be the reoccupation of vacant shop units. However, the future strategy should be flexible to respond to new investment that cannot be accommodated in vacant units. Some redevelopment, refurbishment and expansion may be required in addition to the reoccupation of vacant units, ideally within town centres to accommodate future investment opportunities.

Residents in Pendle have reasonable access to a range of commercial leisure and entertainment facilities within the Borough and in the surrounding areas. Facilities in Burnley and other main centres are accessible, but not all the key sectors are represented in the Borough. There may be potential to accommodate an additional 1,500 sq.m gross of commercial leisure and cultural floorspace, which could include:

- i. 2 or 3 additional medium sized health and fitness facilities (120 to 180 new fitness stations);
- ii. small scale tourist attractions/cultural facilities such as museums/galleries; and
- iii. a bingo facility and other new leisure innovations e.g. trampolines, indoor climbing, escape rooms, virtual sport activities.

The development strategy should be flexible to respond to emerging opportunities for new leisure, entertainment and tourist related facilities.

Policy review

Identifying the hierarchy of centres and the boundaries of centres in the Local Plan is important in terms of:

- i. ensuring the vitality and viability of town and local centres is maintained and enhanced as important hubs for the community, through the application of the impact test;
- ii. directing retail and main town centre uses to appropriate accessible and sustainable locations, through the application of the sequential approach to site selection; and
- iii. identifying a viable role and strategy for each centre.

Barnoldswick, Colne and Nelson should continue to be designated as Town Centres at the top of hierarchy, which will be the main focus for retail development in Pendle serving communities within the wider borough and beyond. The network of town centres, local shopping centres and local shopping frontages should continue to be protected and enhanced to ensure appropriate accessibility to important facilities for all sections of the community and to ensure sustainable shopping patterns.

Barrowford, Brierfield and Earby Local Shopping Centres all play an important role as a focal point in their respective areas, but do not offer the same range and choice of facilities available within the three Town Centres. These centres should continue to be designated as Local a Shopping Centres that will provide important local access to lower order retail for their communities and surrounding hinterland.

Local Shopping Frontages in Pendle have limited facilities and may be under threat if shop/service closures occur in the future e.g. Manchester Road in Nelson. These frontages should continue to be protected because they help to ensure all residents have access to local facilities within walking distance.

Local Plan policy should set out the sequential and impact tests and which designated centres need to be considered. The NPPF minimum threshold of 2,500 sq.m gross is an inappropriate threshold for Pendle Borough because this scale of development would exceed the overall long-term retail/food beverage/leisure projections in all centres in the Borough. The lower retail capacity projections, relatively high vacancy rates in some centres and uncertainties about the post-Covid recovery suggest town centres are now more vulnerable to out-of-centre developments.

Given the overlapping nature of catchment areas in Pendle, a consistent impact threshold should be applied across the authority area. All retail and leisure developments over 400 sq.m gross (combined) proposed outside or on the edge of designated town and local centres should be required to prepare a proportionate impact assessment, including retail and leisure uses included within mixed use allocations.

The area of search for sequential sites i.e. relevant centres will depend on the scale, nature and location of the proposed town centre uses and the catchment area they are likely to serve, should be considered on a case-by-case basis.

All main town centre uses regardless of scale are required to comply with the sequential test. However, the PPG suggests some certain main town centre uses have “particular market and locational requirements that mean they may only be accommodated in specific locations”, but robust justification must be provided to satisfy the sequential test in this respect. This approach may allow local facilities to be provided in areas that may be poorly served and/or within mixed use development to provide

facilities catering for the local needs of the development, without needing to consider the sequential test.

Development plan should define clear boundaries for town and local shopping centres on the Proposals Map, which is important when applying the sequential approach, to direct retail and other town centre uses to sustainable locations and determine whether a retail impact assessment is required.

The retail floorspace capacity projections and the high number of vacant units in centres suggest there is no need to significantly extend or contract centre boundaries to accommodate future growth. The minor contraction of some centre boundaries could be considered where there is a concentration of non-town centre uses or vacant shop units.

The following boundary adjustments could be considered:

Nelson - residential streets on the periphery of the centre could be excluded from the centre boundary, i.e. Every Street, Cross Street, Raglan Street, Cross Street, Oak Street and Bradley Road.

Colne – the break in the commercial frontages on Albert Road could be excluded from the town centre boundary but a new PSA could be designated including the existing primary and secondary frontages with the exception of all uses on the north side of Albert Road west of Linden Road and all uses on the south side of Albert Road west of Great George Street.

Barnoldswick - residential streets on the periphery of the centre could be excluded from the centre boundary. A new PSA should cover the existing primary and secondary frontages.

Brierfield - No contraction or expansion of the centre boundary is considered necessary, although a more flexible approach may be required to tackle the relatively high shop vacancy rate.

Barrowford - some residential gaps in the commercial frontages could be excluded from the centre boundary.

Earby - fragmented commercial units to the north of the centre could be excluded from the centre and the centre boundary contracted to only include the primary and secondary frontages and a more flexible approach may be required to tackle the relatively high shop vacancy rate.

A balanced approach that recognises the need to maintain and enhance each centre's retail role, as well as introducing new non-retail uses. There is still a need to retain and encourage new retail uses within the town and local shopping centres, but changes to the Use Classes Order (UCO) and Permitted Development Rights (PDR) will restrict the future policy approach.

Non-Class E uses including pubs, bars, hot food takeaways and other Sui Generis uses can be assessed against criteria-based policies e.g. relating to breaks in active frontages, amenity issues (noise/smells), impact on the nature and character of the retail frontages. Betting shops and hot food takeaways are Sui Generis uses that can still be controlled by policy, and this not affected by changes to the Use Classes Order or Permitted Development Rights Other non-Class E uses at ground floor level can be controlled within the designated frontages.

The mix of uses within Use Class E can still be controlled via planning conditions or legal agreements, where planning permission is required. Planning policy could seek to control the mix of uses within Class E for new development where planning conditions can be introduced restricting movement within the use class.

The Local Plan could designate PSA's within the three main town centres to manage the mix of uses and protect the vitality and viability of the centre. The continued designation of primary and secondary frontages, in addition to a PSA, is unnecessary due to the changes to the UCO.

Within PSA's the retail offer could still be protected and uses within Class E could be retained whilst maintaining an active frontage. Within other parts of the town centres, a wider range of main town centre uses including Class E, Sui Generis and Class F could be protected.

Contents

1.0	Introduction	1
	Overview	1
	Report structure	1
2.0	Recent trends and key changes	3
	Implications of Brexit, Covid-19 and other trends	3
	National policy and other changes	13
	Summary	16
3.0	Hierarchy of centres	17
	Designated Centres in Pendle	17
	Relative attraction of centres	17
4.0	Retail and food/beverage need assessment	23
	Introduction	23
	Assumptions and base data	23
	Capacity for convenience goods retail floorspace	27
	Capacity for comparison goods floorspace	29
	Capacity for food/beverage floorspace	30
	Operator space requirements	31
5.0	Leisure, entertainment and cultural uses	33
	Introduction	33
	Leisure and cultural expenditure	33
	Leisure/cultural floorspace capacity	34
	Cinemas	34
	Conclusions on commercial leisure uses	39
6.0	Implications for future policy	40
	Accommodating growth and change	40
	Hierarchy of centres	44
	Impact and sequential tests	45

	Town and local centre boundaries	46
	Controlling the mix of uses	49
7.0	Conclusions and recommendations	51
	Meeting the Borough's needs	51
	Policy review	52
	Future monitoring	54

Appendices

- Appendix 1 Study area and methodology
- Appendix 2 Convenience goods assessment
- Appendix 3 Comparison goods assessment
- Appendix 4 Food/beverage assessment
- Appendix 5 Town and local centre analysis

Glossary

Benchmark turnover

Expected turnover of existing retail floorspace based on national averages which the identified available expenditure can be measured against.

Class A1

Commercial units/premises previously classed as retail or shop uses in the old Use Classes Order (UCO), which are now class E(a) in the new UCO (post September 2020).

Class A2

Commercial units/premises previously classed as financial or professional services, e.g. banks and building societies within the old UCO, which are now class E (c) in the new UCO.

Class A3

Commercial units/premises previously classed as restaurants and café food outlets in the old UCO, which are now class E (b) in the new UCO.

Class A4

Commercial units/premises previously classed as public houses or bars in the old UCO, which are now Sui Generis (unclassified) in the new UCO.

Class A5

Commercial units previously classed fast as food or takeaway food outlets selling cooked hot food within the old UCO, which are now Sui Generis (unclassified) in the new UCO.

Class E

Units/premises currently classed as commercial, business and services in the new UCO), including shops, restaurants/cafés, financial/professional services, indoor sports/fitness, medical health facilities, creche/nurseries and office/business uses.

Convenience goods

Consumer goods purchased on a regular basis e.g. food/groceries and cleaning materials.

Comparison goods

Durable goods such as clothing, household goods, furniture, DIY and electrical goods.

Experian

A data consultancy widely used for retail and leisure planning information.

Food and Beverage

Previous uses classes A3, A4 and A5 food and drink outlets, selling food and drinks consumed away from the home or hot food takeaway food but not food and grocery items including convenience goods.

GlobalData

A market research and data consultancy widely used for retail planning information, previously Verdict Research.

Goad Plans

Town centre plans prepared by Experian, which are based on occupier surveys of over 1,300 town centres across the UK.

Gross floorspace

Total external floorspace including exterior walls.

Market share/Penetration rate

The proportion of total consumer expenditure within a given area taken by a particular town centre, destination or shopping/leisure facility.

Multi-channel shopping

Products made available to consumers on more than one sales channel, such as ecommerce websites, brick-and-mortar stores, marketplaces, comparison shopping engines, social media platforms, and other online channels.

Multiplex cinema

A cinema complex with five or more screens.

Net (sales) floorspace

Retail floorspace devoted to the sale of goods, excluding backstage/storage space and other areas not accessible to customers.

Oxford Retail Consultants (ORC)

A data consultancy widely used for retail planning information.

Special forms of trading

Retail sales via the internet, mail order, stalls and markets, door-to-door and telephone sales, including on-line sales by supermarkets, department stores and catalogue companies.

1.0 Introduction

Overview

1.1 Lichfields was commissioned by the Pendle Borough Council (PBC) to prepare an update of the Retail and Leisure Needs Capacity Study, previously prepared in 2007 and partially updated in 2012. The study has been prepared in line with the National Planning Policy Framework (NPPF) relating to the need to ensure the vitality of town centres (paragraph 86) and the evidence to assess the need for economic development (paragraph 81). The update also takes account of the Planning Practice Guidance (PPG). PBC is currently preparing a new Local Plan and this Retail and Leisure Capacity Study update will inform its preparation.

1.2 The objectives of the study are to assess the following matters.

- The composition and operation of the retail and leisure stock within the Borough's shopping centres and its major out-of-centre retail parks.
- The capacity of the borough's shopping centres to absorb competition from competing centres and out-of-centre developments, without experiencing significant adverse effects on trading patterns and footfall, which would undermine their vibrancy and vitality.
- The effect of extended permitted development rights as afforded by changes to the Use Class Order on the borough's town centres through increased opportunities for uncontrolled out of centre retail.
- Analysis of the business needs of the operators and proprietors of main town centre uses and the shopping habits and preferences of their customers.
- Consideration of broader trends and external influences on consumer behaviour, spending and footfall.
- Quantify the need to provide additional floorspace for retail and leisure uses within Pendle in the short, medium and long term.
- Patterns of growth and investment, comparing and contrasting these with patterns of vacancy and the quality of the existing stock.
- Make policy based recommendations.

Report structure

1.3 Section 2 of this report provides an updated overview of trends and recent changes that will affect the demand for main town centre uses. The appropriate policy and strategy approach for Pendle should reflect these underlying trends.

1.4 Section 3 examines the existing hierarchy of centres within Pendle and the surrounding boroughs. Appendix 5 provides more detailed centre health checks for the six main centres in Pendle i.e. Colne, Nelson, Barnoldswick, Barrowford, Brierfield and Earby.

1.5 Section 4 sets out an update of the retail and food/beverage floorspace capacity assessment based on the latest available population and Experian expenditure projections.

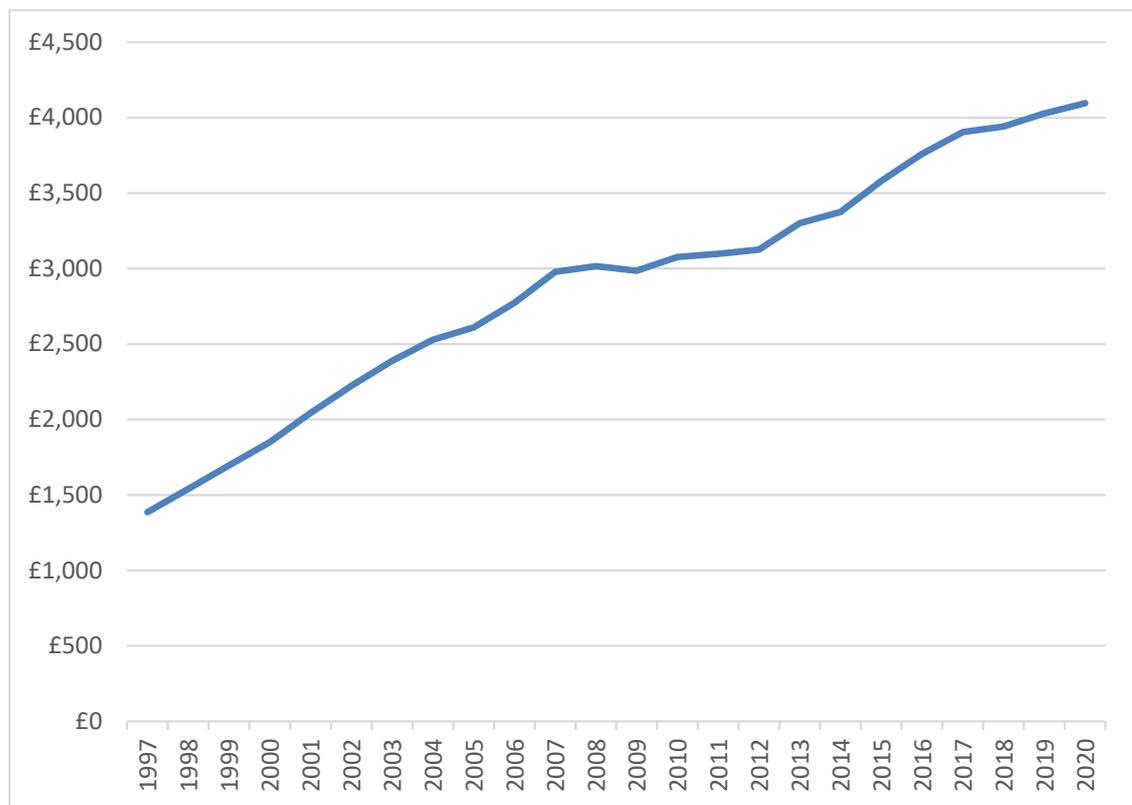
- 1.6 Section 5 updates the assessment of other main town centre uses including the scope for leisure, entertainment and cultural uses.
- 1.7 Section 6 reviews potential implications for future development plan policy taking account of updated floorspace capacity projections and recent changes to the Use Classes Order (UCO) and permitted development rights (PDR).
- 1.8 Section 7 summarises the main conclusions and recommendations.

2.0 Recent trends and key changes

Implications of Brexit, Covid-19 and other trends

2.1 Historic trends indicate that consumer expenditure has grown consistently in real terms, generally following a cyclical growth trend. The growth in expenditure per person on comparison retail goods between 1997 and 2020 is shown in Figure 2.1. High growth between 1997 and 2008 fuelled demand for new retail floorspace. Since the last recession in 2009 expenditure growth has been much slower and the demand for retail floorspace has reduced, particularly comparison goods floorspace. Experian is a data provider most often used in evidence base studies. Experian provides consumer expenditure data and other economic forecasts.

Figure 2.1 UK growth in comparison goods expenditure per head (constant 2018 prices)



Source: Experian Retail Planner Briefing Note 19 (January 2021) – Appendix 4b.

2.2 Experian's latest forecasts suggest slower expenditure growth and home shopping/internet spending is expected to continue to grow at a much faster rate than traditional shopping. Experian's short-term expenditure growth projections (2021 and 2022) for retail and leisure now reflect the expected effects of Brexit and the Covid-19 pandemic. The current cost of living crisis is also likely to suppress expenditure growth in the short term.

2.3 The main implications of Brexit, Covid-19 and the cost of living crisis for the evidence base are likely to be as follows:

- impact on the reliability of demographic and economic projections i.e. population growth and Experian expenditure forecasts;

- short term impacts on the mix of town centre uses and customer behaviour that are likely to distort the base year position; and
- longer term structural impacts that could affect the nature of town centres and the way households shop, eat/drink out and participate in leisure activities.

- 2.4 The key uncertainties relating to the first two points are primarily the length of Covid-19 and the cost of living crisis and recovery period. The longer-term structural implications are harder to predict and quantify at this stage, however there are already signs of a bounce back in terms of expenditure growth, but the cost of living crisis may suppress this bounce back.
- 2.5 In the short term, operators have faced elevated risks to cashflow and increased costs arising from a slump in consumer demand and disruption to supply chains. Non-essential products, hospitality and leisure services were the hardest hit. Short-term supply chain disruption led to inflationary pressures, which will have an impact on consumer demand. Retailers with infrastructure to fulfil on-line orders/home delivery benefitted in the short-term. There is likely to be a long-term structural shift to multi-channel shopping, reducing the demand for physical space within town centres.
- 2.6 Bearing these trends in mind there has been a spike in town centre vacancies with unfortunately some businesses failing to re-open following the Covid lockdowns, particularly non-food retail operators, restaurants and leisure uses. High levels of inflation and the cost of living crisis are likely to exacerbate difficult trading conditions. Many national operators have already announced job losses and store closures.
- 2.7 Brexit and Covid-19 could have short-term impacts in terms of population migration levels and a pause in construction activity. Given that the focus of this update is to assess the long-term need over the new local plan period within five-year interval projections (i.e. base year to 2025, 2025 to 2030, 2030 to 2035 and 2035 to 2040), development plan policy should assume population projections will return to projected levels by 2025. The first interval population projections in 2025, and certainly later years, should not be significantly affected by the Covid-19 crisis. It is not yet possible to understand if the short-term impact will continue into the medium and longer term projections to alter previous trends to any greater extent. This study has adopted Experian's latest 2020 population projections.
- 2.8 Office of National Statistics (ONS) monthly sales volume information for Great Britain indicated total retail sales volumes during the first Covid-19 lockdown were over 22% lower in April 2020 compared with the pre-Covid position in February 2020 (seasonally adjusted). However, the period between lockdowns (July and August 2020) sales volumes had recovered to pre-Covid levels. By October 2020 retail sales were 7% higher than the pre-Covid figure in February 2020. However, the reintroduction of Covid-19 restrictions saw a reduction in sales in between November 2020 to January 2021, reaching 5% below pre-Covid levels. After January 2021, sales had recovered to 9% above pre-Covid levels by April 2021. The seasonally adjusted figures for November 2021 were 6% above pre-Covid levels.
- 2.9 The comparison goods (non-food) sector was particularly affected with a 50% drop in sales from February to April 2020, whilst the food sector experienced 10% growth in sales during March 2020 in part due to panic buying at the start of the crisis. Food sales volumes were consistently higher than the February 2020 low point during March to November 2020.
- 2.10 ONS data suggested on-line retail sales (seasonally adjusted) peaked at over 73% higher in May 2020 compared with February 2020. Figures for June 2020 to May 2021 were

consistently higher than the pre-Covid sales in February 2020, with a second peak of nearly 81% higher than pre-Covid levels in February 2021.

- 2.11 During the first Covid lockdowns food store on-line sales doubled during May and June 2020 but still represented a relatively small proportion of total sales in this sector, reaching about 11.9% in January 2021, but reducing slightly to 9.7% in November 2021. For the non-food sector on-line sales as a percentage of total sales nearly trebled between February and April 2020, reaching 45% of sales. By November 2021 on-line sales in this sector were still 23.2% of total sales, compared with the pre-Covid level of 16.1% in February 2020.
- 2.12 Experian's Retail Planner Briefing Note (January 2022) suggests non-store retailing's market share increased from 20.5% in 2019 to 30.2% in 2021. Non-store sales include all on-line sales and other forms of sales not generated from physical retail floorspace e.g. vending machines, party plan and deliveries. Comparison non-store sales increased from 24.3% to 35.5% and convenience good sales increased from 13.7% to 20.9%. However, Experian expect these figures will fall during 2022 i.e. 31.9% for comparison goods sales and 19.1% for convenience good sales. Nevertheless, the 2022 figures remain significantly higher than pre-Covid market shares in 2019.
- 2.13 It is difficult to predict the longer term implications for retail sales and the amount of on-line sales. Nevertheless, ONS's post lockdown data suggests retail sales have recovered to previous levels of growth, but the proportion of retail sales spent on-line is a higher proportion of total sales, which will have an impact of traditional bricks and mortar retailing.
- 2.14 Reflecting these trends, Experian's latest projections recommend relatively modest levels of growth when compared with historic trends. It is too early to plan for a significant shift towards on-line shopping, over and above the levels of growth already predicted by Experian, but a higher shift to on-line shopping is possible. These longer term forecasts should be monitored and kept under review.

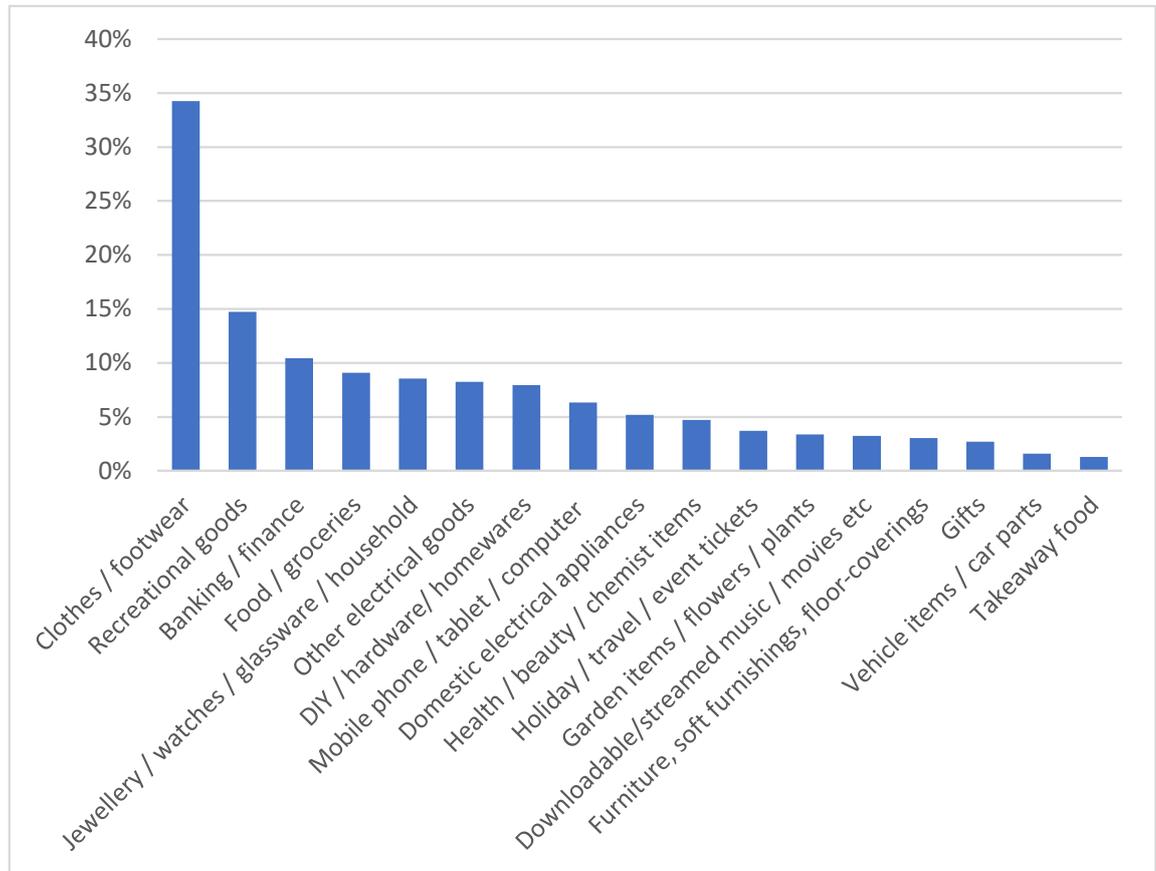
Long-term expenditure trends

- 2.15 Planning based on long term expenditure growth projections has always had inherent uncertainties. Despite these uncertainties, development plans must assume a return to reasonable rates of growth and relative normality, although the implications of the short-term impacts should not be ignored. It is better to plan for a return to growth and then modify the strategy later if levels of growth are lower than originally predicted, rather than not planning for growth because there are significant uncertainties. The latter approach is likely to fail to respond in time if higher levels of growth are achieved, and any growth will go elsewhere. Nevertheless, a cautious approach to expenditure growth, as now suggested by Experian, should be adopted bearing in mind the uncertainties relating to the growth in on-line shopping.
- 2.16 For convenience goods, Experian's latest forecasts (January 2022) suggest a 2% reduction in expenditure per capita during 2022 and then limited growth thereafter (0.1% per annum). Experian expects slow expenditure growth and most of this growth will relate to non-store sales. Any need for new convenience goods retail floorspace in Pendle is likely to relate to population growth, high levels of trading or qualitative areas of deficiency.
- 2.17 For comparison goods expenditure, higher levels of growth are expected in the future (between 2.8% to 2.9% per annum), but still at a lower rate than previous historic trends (8% per annum between 1997 and 2007). Historically comparison goods expenditure has

grown significantly more than convenience goods expenditure, and Experian's latest national growth rate recommendations are consistent with these past trends.

- 2.18 New forms of retailing (multi-channel and home shopping) have and will continue to grow. Home/electronic shopping and home delivery has increased with the growth in the use of personal computers, smart phones and the internet. Click and collect / click and return shopping has become more popular. Recent trends suggest continued strong growth in multi-channel activity. Experian's Retail Planner Briefing Note 19 (January 2022) states:
- "After having eased in 2021, we expect the SFT (special forms of trading) market share to continue to grow strongly in the mid-term, hitting above 30% in 2025. The pace of e-commerce is anticipated to moderate over the longer term, reaching 36.5% of total retail sales by 2040."*
- 2.19 The floorspace capacity assessment in this study update makes an allowance for future growth in e-tailing based on Experian's latest projections. Given the likelihood that multi-channel expenditure will continue to grow at a faster pace than other consumer expenditure, the need assessment adopts relatively cautious growth projections for expenditure and an allowance is made for operators to increase their turnover/sales density, due to growth in home shopping and click and collect.
- 2.20 The household survey results (September 2022) suggest 25% of respondents do most of their household's non-food shopping on-line. The household survey results indicate that 5.7% of households did their last main food and grocery shop via the internet/delivery. The household survey results indicate many households regularly buy items from the internet for home delivery. About 25% of respondents do most of their non-food shopping on-line. Nearly two thirds of respondents regularly use the internet for shopping or services. The main products/service purchased by households online are shown in Figure 2.2.

Figure 2.2 Items regularly purchased online (% of all respondents)



Source: NEMS household telephone survey results September 2022

2.21 These survey results indicate that a wide range of goods are purchased on-line. Clothing /footwear are most often purchased online.

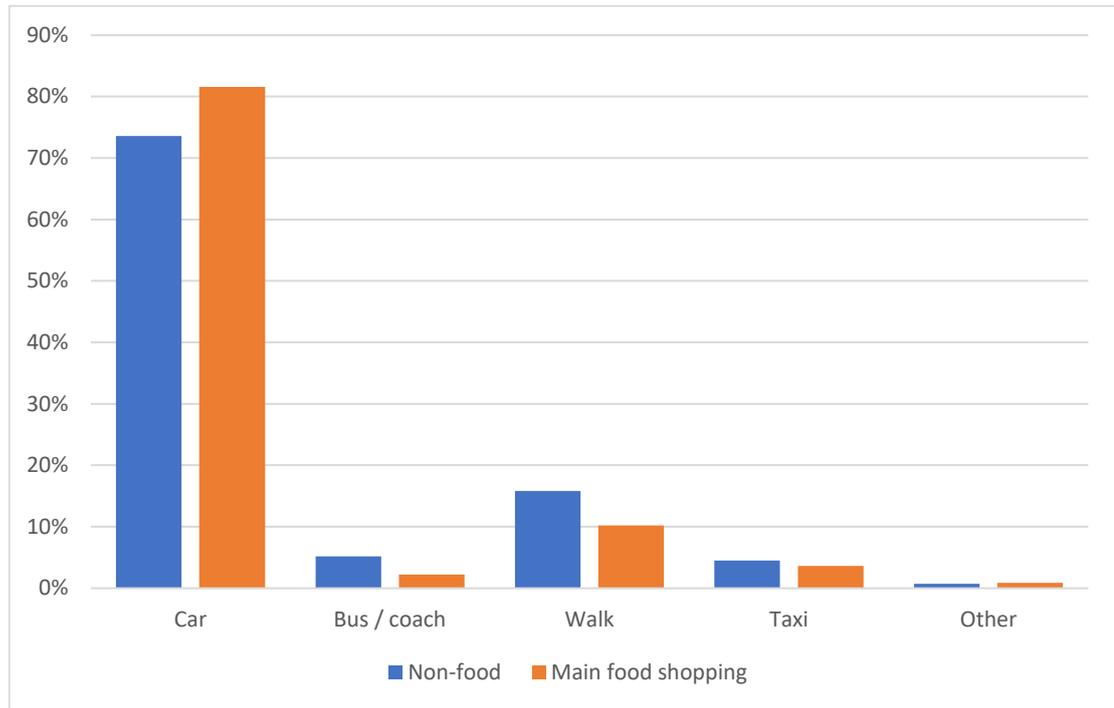
Mode of travel and frequency of trips

2.22 As indicated above, 25% of respondents do most of their non-food shopping on-line and 5.7% did their last main food and grocery shop via the internet/delivery. Experian suggests over 27% of retail sales is via non-store activity. These figures suggest many households do not need to travel to undertake food and non-food shopping.

2.23 Despite the increasing proportion of households shopping via the internet, the majority continue to travel to shopping destinations by car. The results for food and non-food shopping (excluding internet/home shopping) are shown in Figure 2.3.

2.24 Shopping by car (driver or passenger) is still the most popular mode of travel for both non-food and main food shopping trips but, relatively high proportions of customers walk to shop for both food and non-food shopping.

Figure 2.3 Mode of travel for non-food and main food shopping (% of travelling household respondents)

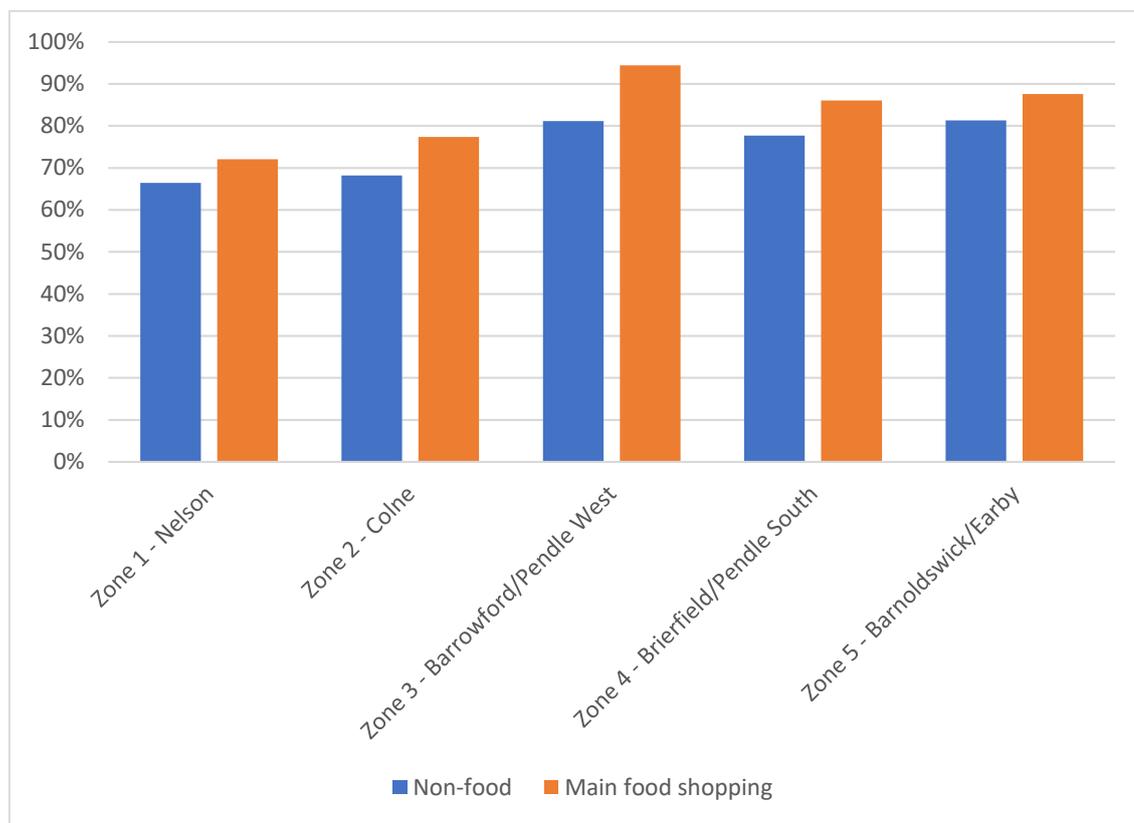


Source: NEMS household telephone survey results September 2022

2.25 Car travel for food and non-food shopping was highest in the rural areas of the Borough i.e. Zone 3 (Barrowford/West Pendle and Zone 5 (Barnoldswick/Earby), as shown in Figure 2.4.

2.26 Car usage for shopping was generally lower in the urban areas of Nelson and Colne. This variation may be due higher levels of access to shopping facilities on foot and public transport in the central area of the Borough and lower levels of access in the rural areas to the west and north. Based on Lichfields’ recent experience, car usage is lower within large towns and higher in rural areas i.e. normally over 80% of households for main weekly shopping.

Figure 2.4 Car borne travel for non-food and main food shopping by Zone (% of travelling household respondents)



Source: NEMS household telephone survey results September 2022

- 2.27 Car usage is generally higher for main food shopping than for non-food shopping because many households undertake bulk food and grocery shopping once a week or less often. The household survey suggests, on average, each household undertakes main food and grocery shopping trips 1.2 times per week, with the majority (63%) undertaking one weekly trip.
- 2.28 Non-food shopping trips are generally undertaken less often, with an average of just under 0.7 trips per week and only 25% undertake non-food shopping once a week or more often.
- 2.29 Bus and train usage is slightly higher for non-food shopping, which may reflect more non-food shopping trips made to destinations outside the Borough e.g. Burnley.

Demand for town centre floorspace

- 2.30 In the past lower expenditure growth and deflationary pressures (i.e., price cutting) in the non-food sector have had an impact on the high street. Because of these trends, the UK average shop vacancy rate (based on Goad Plan data) increased from around 10% in 2005 to about 14% in 2012. Vacancy rates gradually improved to 11.8% in 2018 but increased to 14.7% in 2021. There has been a sharp increase in shop vacancies in many town centres due to the impacts of the Covid-19 pandemic, Brexit and the growth in on-line shopping. The more recent impact of higher inflation and the cost of living crisis is also likely to constrain consumer demand, which may affect the demand for floorspace at least in the short term.
- 2.31 Pendle Borough Council’s Town Centre Land Use Survey in 2022 indicated the number of vacant units was 127. The average shop unit vacancy rate in the six main centres is 17.8%, this figure excludes Class B, D1/D2 and residential uses. This vacancy rate is higher than the UK pre-Covid-19 average (12.4%) and the current post-Covid national average (14.7%).

- 2.32 Pendle’s land use surveys suggest the number of vacant units increased from 112 in 2006 to 148 units in 2011, due to the impact of the recession in 2009. The number of vacant units improved to 113 in 2014 and increased slightly to 119 in the latest pre-Covid survey in 2019. The current 2022 survey shows suggests the highest number (127) of vacant units since 2012.
- 2.33 This recent vacancy increase is consistent with national trends. The underlying increase in vacant units across the UK is primarily due to the reduction of comparison goods retail outlets. The national decline in the number of comparison goods retail outlets within town centres has been evident in Pendle’s town centres. The Council’s latest 2022 land use survey suggests the number of comparison goods shops in the six main town centres is 200 outlets, only about 28% of all shop/ service units. The 2007 Pendle Retail Capacity Study indicated that comparison goods retail outlets occupied over 36% of units. The 2022 number of food/beverage and non-retail service uses is 307 outlets, over 43% of all shop units. In most centres, non-retail services have helped to replace lost comparison goods outlets. A more detailed analysis of the mix of uses in Pendle’s centres compared with the national picture is set out in Section 3.
- 2.34 Property owners, landlords and funds have come under increasing pressure with struggling occupiers seeking to renegotiate terms through a company voluntary arrangement (CVA) i.e., an insolvency process designed to let a firm with debt problems reach an agreement with creditors to help pay off part or all debts. Elsewhere, retailers have been continuing to 'right size' their portfolios, with operators announcing store closures. These trends have impacted on rental income and the capital value of retail/leisure assets. These trends are likely to be exacerbated by the Covid-19 pandemic and the cost of living crisis, at least in the short-term.
- 2.35 Whilst the CVA process has created difficulties for landlords in terms of rent negotiations, at the same time newly freed-up space has provided new opportunities. Vacated premises have been reconfigured and reused for food/beverage, trampolines, climbing and indoor golf.

Food store operators

- 2.36 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. Retailers have also changed their trading formats to include smaller store formats capable of being accommodated within town and local centres (such as the Tesco Express/ Metro, Sainsbury's Local, Little Waitrose and Marks & Spencer's Simply Food formats).
- 2.37 The number of Tesco Express, Sainsbury's Local and Little Waitrose stores has increased significantly during the last decade. Taking Sainsbury's as an example, data provided by Mintel indicates that the number of Sainsbury's Local stores increased rapidly by 76% between 2011 and 2016.
- 2.38 Several proposed larger food superstores have not been implemented across the country. There has been a move away from larger stores to smaller formats, reflecting changes in customers' shopping habits i.e. more frequent but smaller food and grocery shopping trips. This trend may have increased with more home working during the pandemic lockdowns but may move back to pre-Covid levels in the future.
- 2.39 The expansion of European discount food operators Aldi and Lidl has been rapid during the last decade. These operators are now competing more directly for market share with other main food store operators. Home Bargains and B&M has also expanded rapidly in recent

years. These trends are evident Pendle with two Lidl stores, two Aldi stores and B&M and Home Bargain stores.

Comparison retailers

- 2.40 Comparison retailers have also responded to difficult market conditions. The bulky goods warehouse sector has rationalised, including mergers and failures, and scaled down store sizes. Other traditional high street retailers have sought large out-of-centre stores, for example Next, TK Maxx and M&S. Matalan also opened numerous discount clothing stores across the UK. Sports clothing retail warehouses including Decathlon and Sports Direct expanded out-of-centre. These trends have slowed significantly and are unlikely to re-emerge for the foreseeable future.
- 2.41 The demand for premises within the bulky goods sector, i.e. furniture, carpets, electrical and DIY goods, has been particularly weak in recent years. This has led to voids on some retail warehouse parks and proposals to extend the range of goods sold to non-bulky goods. This trend has also led to the relocation of retailers to out of centre locations, creating more vacant units in town centres. The discount sector has occupied many units on retail parks e.g. Home Bargains, Poundland and B&M Bargains.
- 2.42 The retail warehouse sector is reasonably well represented in Pendle with a concentration of stores at Boundary Retail Park, Swinden Retail Park and North Valley Retail Park. Pendle Village and Boundary Outlet also provide a wide range of bulky and non-bulky comparison products and draw additional trade from a wide area.
- 2.43 Within centres, many high street multiple comparison retailers have changed their format. For over two decades, high street national multiples have increasingly sought larger modern shop units (over 200 sq.m) with an increasing polarisation into the larger regional and sub-regional centres. Many multiple retailers now require representation in fewer locations to service catchment areas. This trend is evident in most centres in Pendle with a limited number of comparison goods national multiples present.
- 2.44 In general, operator demand for space has decreased significantly during the last 5 years and, of those national multiples looking for space, many prefer to locate in larger centres e.g. Burnley, Blackburn and Preston. Centres in Pendle are at a lower level in the hierarchy and multiple operator demand may be much less in these centres in the future. Much of the occupier demand in smaller centres has come from the discount and charity sectors or non-retail services, rather than higher order comparison goods shopping. Polarisation of investment in the larger centres is likely to continue in the future, with many retailers reducing their overall number of outlets.
- 2.45 The continuation of these trends will influence future operator space requirements in Pendle with smaller vacant units and lower tier centres continuing to be less attractive for new multiple occupiers, and retailers increasingly looking to locate into larger units in larger town centres. However, smaller vacant units could still be attractive to independent traders and non-retail services looking to serve local catchment areas.

Charity and discount shops

- 2.46 The charity shop sector has grown steadily over the past 30 years and there is no sign this trend will end. Planning policies cannot control the amount of charity shops because they fall within the same use class as other shops (now Class E). In many centres, charity shops have occupied other vacated shop premises during previous recessions. This trend is evident in Pendle with a strong presence of charity shops in most centres. There are 17

charity/second hand shops within the six main centres in the Borough, 8.5% of all comparison shops, similar to the UK average of 9.9%.

- 2.47 Charity shops can often afford higher rents than small independent occupiers because of business rate discounts. It does not follow that these charity shops will be replaced by traditional shops when the market recovers.

Non-retail services

- 2.48 Service uses perform an important role in the overall offer of a centre and encourage customers to shop locally. The non-retail service uses include the following Class E and Sui Generis uses:

- hairdressers, dry cleaners, travel agents, some sandwich shops (those not categorised as hot food takeaways), funeral parlours and post offices;
- banks, building societies, financial services, betting offices, pawnbrokers, estate agents and employment agencies;
- restaurants, cafés and hot food takeaways; and
- pubs/bars.

- 2.49 The growth of money lending/pay day loan shops, betting shops and hot food takeaways has raised concerns amongst many local planning authorities and has resulted in a change to permitted development rights to control the growth of these uses in town centres. These trends have not been particularly evident in Pendle. The proportions of betting shops and takeaways are relatively low when compared with the national average, except for Nelson town centre.

- 2.50 Changes to the GPDO has had an impact on some town centres but the more recent changes to the Use Classes Order (UCO) and permitted development rights (PDR) are likely to lead to more significant changes in the future. These measures allow for much greater flexibility for changes of use from retail to non-retail uses. To date these measures have not significantly changed the composition of most town centres, which may have been suppressed by the Covid pandemic. The impact of these changes will need to be carefully monitored. The cost of living crisis may increase demand for change from retail to other uses.

The evening economy

- 2.51 Food/beverage, leisure and entertainment are fast moving and creative sectors, with a steady flow of new concepts emerging. Within these sectors there has been a significant increase in the number of national multiple chains which have sought to increase their geographical coverage, but primarily in larger centres.

- 2.52 Recently restaurant chains have experienced difficulties resulting in closures, which suggests operators may have over-stretched. Demand continued to increase for coffee shops, such as Starbucks, Costa Coffee and Café Nero. National branded pub/restaurant chains invested heavily and not exclusively in larger centres. Themed restaurants also expanded rapidly. This sector in town centres has been the most adversely affected by the Covid-19 crisis and the potential for growth in the short-term is uncertain.

- 2.53 The key categories for food and beverage offer are:
- *Impulse*: characterised by their produce range that is typically highly visual and hand-held so that it can be eaten "on the go";

- *Speed eating fast food*: food that can be purchased and consumed quickly, therefore price is low and ambience is less important. This sector is dominated by traditional high volume fast food offers such as burgers and fried chicken;
- *Refuel and relax*: a drink, snack and a short break in a pleasant environment rather than focusing on eating a main meal; and
- *Casual dining/leisure dining*: incorporating several food styles, types and ethnic origins. The ambience and environment of casual dining is as important as the food, drink and service provided. The style is informal but is normally table service.

2.54 The proportion of non-retail uses within town centres across the country increased significantly before the Covid crisis. This trend was evident in Pendle, and this sector appears to have recovered following the Covid-19 crisis.

Pop-up spaces

2.55 The increase in vacant space across the country has led to an increase in premises available for temporary uses or pop-up uses including temporary restaurants, bars, shops and galleries. Some landlords have opted for flexible leases, with changing attitudes towards short-term spaces. New independent brands have benefitted despite the lack of brand recognition. E-commerce brands have also sought physical presence, as an essential part of their marketing strategy and an effective way to engage with existing and new customers off-line. Brands have opened pop-up outlets in different locations to test and learn before committing to permanent stores. This trend may increase following the Covid-19 crisis.

National policy and other changes

2.56 The revised NPPF was replaced by an amended version in July 2021. The revised NPPF indicates planning policies should (para. 86):

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

- 2.57 The rapid changes that are affecting the retail sector and town centres are acknowledged and reflected in the revised NPPF. It recognises that diversification is key to the long-term vitality and viability of town centres, to 'respond to rapid changes in the retail and leisure industries'. Accordingly, planning policies should clarify 'the range of uses permitted in such locations, as part of a positive strategy for the future of each centre'.
- 2.58 The appropriate balance between retail and other town centre activity has been debated in recent years, as town centres increasingly need to compete with on-line shopping. Covid-19 and cost of living crisis has elevated this debate. Online shopping is likely to grow faster than previously expected due to shifts in customer behaviour accelerated by the Covid-19 crisis. The need for a better mix of uses within town centre will become increasingly important. A broader mix of uses can extend activity throughout the daytime and into the evenings.
- 2.59 In September 2020, the UCO was significantly amended. Changes to town centre use classes now allow far greater flexibility for uses to change within town centres without the need to obtain planning permission. The UCO has significant implications for shop frontage planning policies, restricting the ability of local planning authorities to control the mix of uses and retain specific uses previously protected e.g. Class A1 retail.
- 2.60 In relation to main town centre uses, as defined in the NPPF Annex 2 glossary, the UCO changes provide for three new use classes:
- Class E (Commercial, business and service);
 - Class F.1 (Learning and non-residential institutions); and
 - Class F.2 (Local community).
- 2.61 The UCO changes now combine: Shops (A1), financial/professional services (A2), cafés/restaurants (A3), indoor sports/fitness (D2 part), medical health facilities (D1 part), creche/nurseries and office/business uses (B1) into the new single Use Class E. The new Class E includes some uses that are not defined as 'main town centre uses' within the NPPF e.g. medical services and some light industrial uses.
- 2.62 Other changes potentially introduce more restrictions rather than flexibility. Partly in response to the impact of the Covid-19 crisis, there is added protection against the loss of learning, non-residential and community facilities, including museums public halls, sports facilities and local shops. These uses are now included in new Classes F.1 and F.2. Class F.2 also includes small, isolated shops (at least 1 kilometre from a similar shop) selling essential goods including food.
- 2.63 Other potential 'bad neighbour' town centre uses have been placed in the list of Sui Generis uses, with no permitted changes of use e.g. pubs/bars (A4), takeaways (A5), cinemas and live music venues. The inclusion of these uses as Sui Generis appears to have a dual function i.e. controlling potential 'bad neighbour' uses such as pub/bars and takeaways, whilst protecting against the loss of other cultural facilities such as cinemas and music venues, most vulnerable to the impacts of Covid-19.
- 2.64 The previous distinction between Class A3, A4 and A5 uses has become more critical, with Class A3 uses now having more flexibility in the new Class E, but no flexibility for Class A4 and A5 uses. Many Class A3 restaurants offered a takeaway service during the Covid-19 crisis and the categorisation of bar/restaurants has always been arguable and will be a matter of fact and degree on a case-by-case basis. In response to these changes, Pendle's future land use survey should re-categorised existing uses within centres and frontages to reflect the new UCO, which is helpful when considering appropriate policy options and

change of use planning applications. It will also be necessary to retain the previous land uses categories in the future to continue to monitor trends and changes from previous surveys dating back to 1991.

- 2.65 The potential implications of permitted changes in use outside town centres may also have unintended consequences. In theory large out-of-centre B1 office buildings or D2 commercial leisure uses, with no restrictive conditions, could be converted to retail use without planning permission or an assessment of the impact on the town centre or application of the sequential test. Allowing retail uses to occupy out-of-centre buildings could run counter to the objective of maintaining and enhancing town centres. This change could have implications for the effectiveness of retail impact and sequential test policies.
- 2.66 In December 2020, the Government began a consultation on a variety of further changes to permitted development rights relating to housing delivery and public service infrastructure. The consultation included a proposed Class E to Class C3 permitted development right. The outcome of several elements of this were published and the associated amendments to the Town and Country Planning (General Permitted Development) (England) Order 2015 (GPDO) which were laid before Parliament in the Town and Country Planning (General Permitted Development etc.) (England) (Amendment) Order 2021.
- 2.67 A new Class MA business and commercial to residential permitted development right has introduced certain commercial to residential permitted development rights. The new class MA is different to previous retail and office to residential PD rights, with several different limitations and conditions. Delivering housing and the reuse of redundant shopping space is the Government's priority and the Class MA permitted development right emphasises this.
- 2.68 The new permitted development rights effectively reduce the scope of office to residential permitted development while increasing the scope of retail to residential and introduce new PD rights for other town centre uses to change to residential. These PD rights are subject to floorspace, vacancy and location limitations.
- 2.69 Class MA allows many properties within Class E to change to residential without consideration of impact on the high street where the proposal is outside of a conservation area and limited consideration if it is within a conservation area. The impact on the character and sustainability of the conservation area needs to be considered for ground floor proposals. There may also be restrictive planning conditions or legal agreements that prevent change of use via Class MA.
- 2.70 Only listed buildings and their curtilage and properties in the most sensitive locations such as World Heritage Sites, National Parks and Areas of Outstanding National Beauty are excluded from the new PD right. The legislation requires assessment of loss of retail and office in beautiful and heritage locations, but in no other retail or business destinations. The retail assessment required by the previous Class M PD right falls away.
- 2.71 Subject to limitations and conditions, former uses classes Class A1 (shops); Class A2 (financial and professional services); Class A3 (food and drink); Class B1 (business); Class D1(a) (non-residential institutions – medical or health services); Class D1(b) (non-residential institutions – crèche, day nursery or day centre) and Class D2(e) (assembly and leisure – indoor and outdoor sports), other than use as an indoor swimming pool or skating rink, now benefit from the Class MA PD rights.
- 2.72 The permitted development right does not apply if more than 1,500 sq.m of cumulative floorspace is to be converted. This is significantly more than the 150 sqm permitted under Class M retail to residential at present, but a significant new restriction for office to

residential change of use via permitted development. Most retail units within town centres are below this threshold and converting only part of a building is permitted.

- 2.73 To benefit from Class MA, the use of the building must have fallen within Class E or one or more of the uses that it replaced for at least two years continuously prior to the date the prior approval application is made. The building must have been vacant for a continuous period of at least 3 months immediately prior to the date of the application for prior approval. A key change arising from Class MA is the loss of a prior approval matter considering the impact of the loss of retail.
- 2.74 In a conservation area and where the change of use is at ground floor level, the impact on the character and sustainability of the conservation area is another new prior approval matter. Addressing this matter could potentially include a limited assessment of retail impact.
- 2.75 The requirement to meet space standards in relevant prior approval applications came into force in April 2021. The GPDO does not grant permission for any dwelling that would be less than 37 sq.m or would not comply with the nationally described space standard. These measures have raised concerns about the potential impact on high streets and shopping parades, which are essential to support local communities.

Summary

- 2.76 The trends and changes highlighted in this section, including the growth of home shopping are not new and have been affecting the high street for many years. In response to these trends, town centres have changed and diversified. The food/beverage, leisure and non-retail service sectors have to some extent been successful in occupying space no longer attractive to retail tenants. However, the shop vacancy rate in Pendle Borough remains relatively high.
- 2.77 There have been cyclical trends in vacancy rates reflecting the macro-economic trends, but in most cases, town centres recovered during periods of stronger growth. Many believe the most recent decline is structural rather than cyclical and a more flexible approach to town centre uses is required.
- 2.78 The most recent trends suggest vacancy rates have been slow to recover in weaker centres, and many high street retailers are still experiencing difficulties. The Goad national shop vacancy rate has increased to over 14% and therefore a cautious approach to future growth is required. The implications of the cost of living crisis also endorse a cautious approach.
- 2.79 Shopping behaviour will continue to change, and town centre will need to respond. All centres will need to focus on their advantages over other forms of multi-channel shopping, for example using the internet as an extended shop window, click and collect facilities and providing a combined retail and leisure experience for those looking for a "day out" or "evening out".

3.0 Hierarchy of centres

Designated Centres in Pendle

3.1 Designated centres and frontages parades in the Pendle are summarised in Table 3.1, based on the Council’s latest land use survey in 2022.

Table 3.1 Pendle’s designated centres - Number of outlets by use

Centre	Total retail units	Comparison goods retail	Convenience goods retail	Food/ beverage	Other services*	Vacant units
Town Centres						
Nelson	252	75	22	27	54	74
Colne	196	56	17	34	71	18
Barnoldswick	120	33	17	16	39	15
Local Shopping Centres						
Barrowford	51	13	4	17	15	2
Brierfield	48	9	6	8	16	9
Earby	41	14	9	7	3	8
Local Shopping Frontages						
Scotland Rd, Nelson	11	4	1	1	3	2
Manchester Rd, Nelson	11	2	0	0	3	6
King Edward Tr, Barrowford	10	6	0	2	3	0
Gisburn Rd, Barnoldswick	8	0	2	2	2	2
Burnley Rd, Brierfield	3	0	1	2	0	0
Gisburn Rd, Barrowford	2	1	1	0	0	0

Source: Pendle Centre Land Use Survey 2022

* -excluding Class B, D1/D2 and residential uses z

3.2 This information indicates that the three designated Town Centres have 120 or more retail/service premises and have a reasonable mix of facilities. Local Shopping Centres are much smaller (around 40 to 50 units) and have a more limited range and choice of comparison goods shopping. Local Shopping Frontage have 11 or less units.

Relative attraction of centres

3.3 The Javelin Group’s Venuescore ranked over 3,500 retail destinations in the UK in 2017 including town centres, malls, retail warehouse parks and factory outlet centres across the country in 2017. This information has not been updated since 2017, but still provides a useful comparative analysis.

3.4 Each destination was given a weighted score based on the number of multiple retailers present, including anchor stores, fashion operators and non-fashion multiples. The score attached to each retailer was weighted depending on their overall impact on shopping patterns, e.g. a department store will achieve a high score. The results for the shopping destinations in Pendle and other relevant destination in the sub-region are shown in Table 3.2.

3.5 Each shopping destination was given a weighted score for multiple retailers present. The score attached to each retailer is weighted depending on their overall impact on shopping patterns. The Venuescore usually correlates to the actual market size of the shopping destination in terms of consumer expenditure, but some smaller shopping centres such as Nelson and Colne have a higher proportion of independent stores that can generate spending levels much higher than their relative Venuescore suggests.

Table 3.2 Javelin’s Venuescore UK shopping Index

Destination	UK Rank 2017	Venuescore 2017	Market position
Manchester	1 st	780	Upper Middle
Preston	58 th	228	Middle
Bradford	80 th	200	Middle
Blackburn	143 rd	156	Middle
Halifax	192 nd	125	Lower Middle
Keighley	200 th	121	Lower Middle
Burnley	236 th	106	Lower Middle
Accrington	244 th	103	n/a
Skipton	274 th	94	Middle
Clitheroe	666 th	46	Middle
Nelson	912 th	35	n/a
Burnley R P	1,140 th	28	Lower Middle
Colne	1,140 th	28	Lower Middle
Princess Way R P	1,559 th	20	n/a
Padiham	1,696 th	18	Lower Middle
Regent Street (Boundary RP/Swinden RP)	2,021 st	15	n/a
Finsley Gate/Centenary Way	2,171 st	14	Middle
North Valley R P	2,566 th	12	n/a
Vivary Way (Boundary Mill)	2,566 th	12	Upscale
Colne Rd, Burnley	2,815 th	11	n/a

Source: Javelin Group 2017

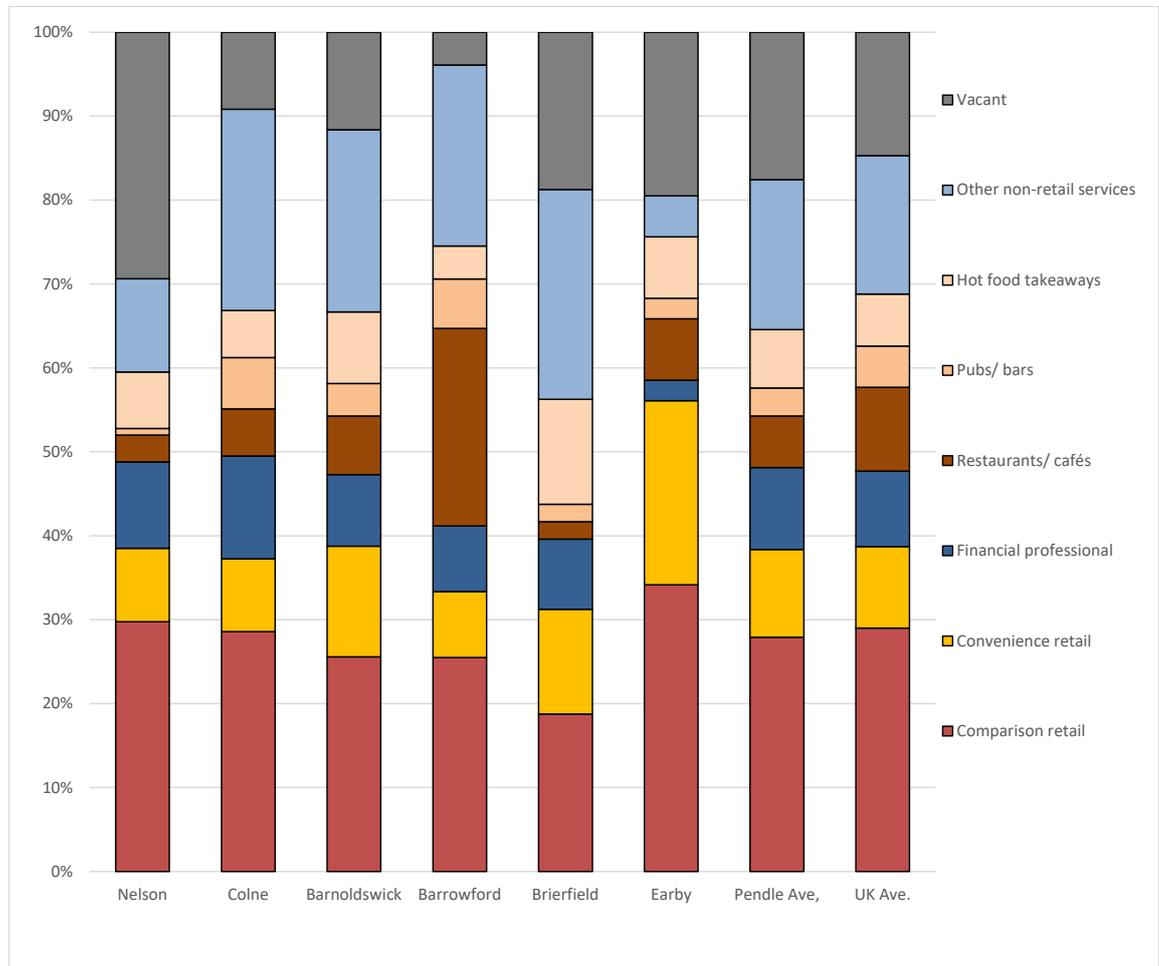
- 3.6 This Javelin information was used in the retail industry to assess the relative strength of shopping destinations. Javelin also assessed the market position of centres based on the retailers present and the centre’s relative position along a spectrum running from discount to luxury or down-market to aspirational (i.e. lower, middle to upscale), also shown in Table 3.2.
- 3.7 The market position relates specifically to the fashion offer together with others easily classified operators, because the range and choice of clothing and fashion shopping was the key driver in the relative attraction of large comparison shopping destinations. The Venuescore data was weighted towards clothing and fashion retailing. Clothing/fashion shopping facilities were, and still are, primarily focused within the larger centres.
- 3.8 Consistent with the Pendle Local Plan, the Javelin index ranked Nelson and Colne as the main centres within the Borough. Other centres in Pendle did not feature in Javelin’s rankings due to the absence of comparison goods multiple retailers.
- 3.9 Manchester City Centre is ranked at the top of the hierarchy in the sub-region, with an “upper middle” market position. Preston, Bradford, Blackburn, Halifax and Keighley were all ranked within the top 200 in the UK and their scores reflected the higher number of national multiple retailers present in 2017. Burnley was just outside the top 200. The top ranked centres also had the higher market positions, with a focus on luxury and higher value goods rather than discount products. Nelson and Colne had much lower scores due to the limited provision of comparison multiple retailers.
- 3.10 Colne was considered to have a “lower middle” market position, along with Burnley and Keighley. Nelson was not assigned a market position due to the absence of multiple fashion retailers. However, Boundary Mills was classified as having an “upscale” market position, suggesting this facility has a wide catchment area, attracting customers for higher value fashion goods.

3.11 Overall, the Javelin 2017 analysis suggested town centres within Pendle had a limited choice of comparison goods multiple retailers, particularly clothes/fashion shops. However, the provision of large stores in retail parks and Boundary Mills supplement the retail offer within designated centres.

Diversity of main town centre uses

3.12 Figure 3.1 below shows the composition of the six town centres in terms of the mix and proportion of different uses i.e. the proportion of shop units within each use class. This is compared with the Borough and Goad Plan average mix for centres across the UK. More detail is provided in the health check analysis in Appendix 5.

Figure 3.1 Mix of retail and service uses (excluding Class B, D1/D2 and residential uses)



Source: Pendle Council’s land uses survey 2022 and Experian Goad Plans UK average.

3.13 All centres have a reasonable mix of retail and service uses, but Brierfield has a much lower proportion of comparison goods retail units than the national average. All centres have a reasonably high proportion of convenience goods retail and non-retail services. The food/beverage offer varies significantly, with good hot food takeaway provision in Barrowford and weaker provision in Nelson.

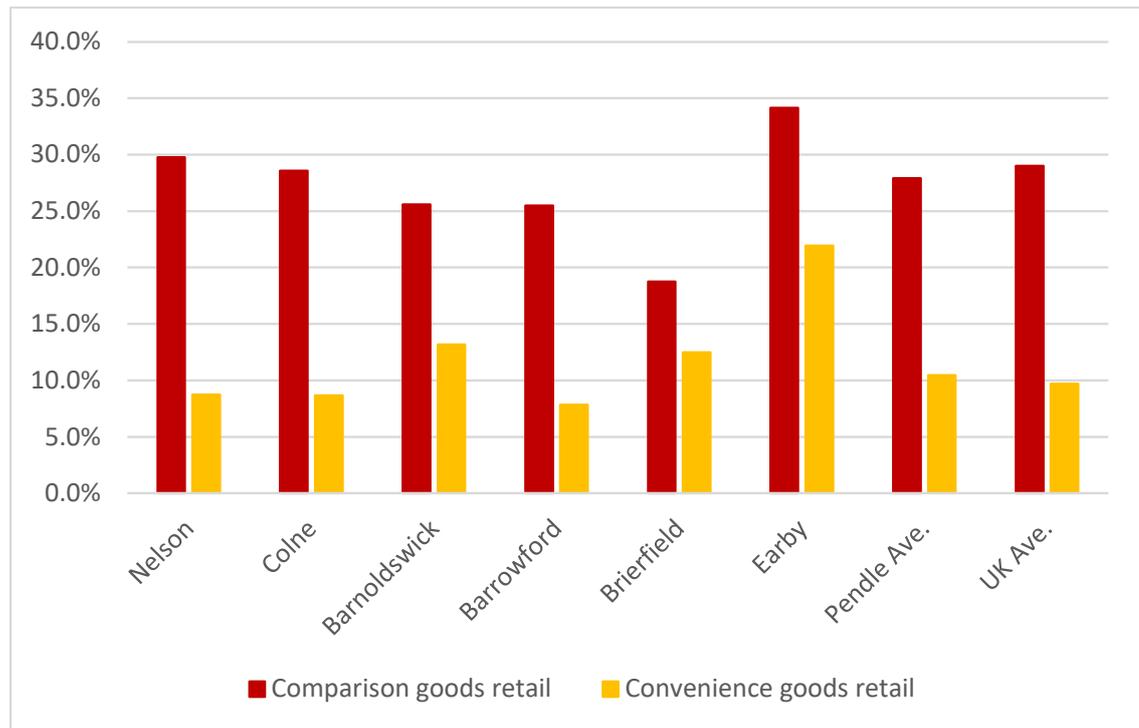
3.14 Shop unit vacancy rates in Pendle Borough are higher than the current UK average (14.7%). Nelson, Earby and Brierfield have the highest vacancy rates at around or over 20%. Pendle’s

land use surveys in 2019 and 2022 suggests the number of vacant units increased from 119 in 2019 to 127 in 2022, which may be due to a post Covid spike in shop vacancy rates.

Retail representation

3.15 Figure 3.2 compares the proportion of convenience and comparison retail units within centres compared with the national average.

Figure 3.2 Proportion of comparison and convenience retail (% of all units)



Source: Pendle Council’s land uses survey 2022 and Experian Goad Plans UK average.

3.16 Most centres have a similar or higher proportion of convenience goods units when compared with the UK national average. Earby has a particularly high proportion of convenience goods outlets. Conversely comparison goods retail is lower than average in Barnoldswick, Barrowford and Brierfield. Earby has a high proportion of comparison goods retail uses when compared with the national average, but the number of shop units in the centre is relatively small (41 units) and many of the shop units are relatively small (less than 100 sq.m gross).

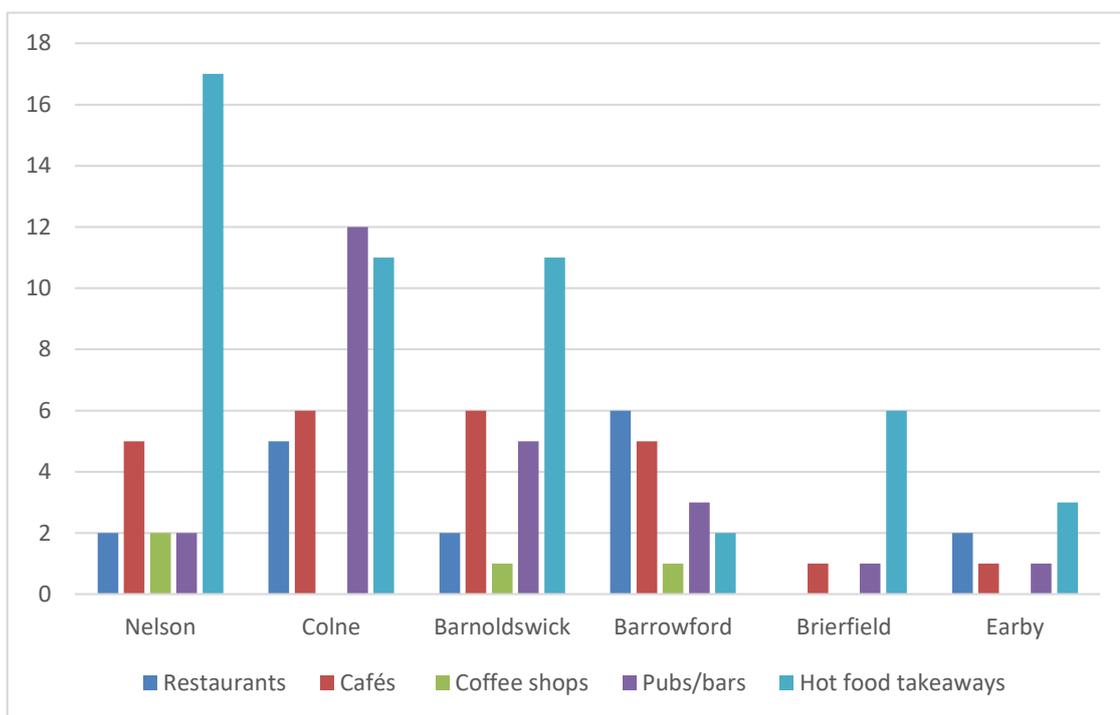
3.17 In general, larger centres tend to have a higher proportion of comparison goods shop units than smaller centres. Larger centres tend to have a stronger focus on fashion shopping and therefore have a higher proportion of comparison shops. Smaller centres tend to have a higher proportion of convenience goods units and non-retail services, catering for the day to day needs of their local catchment area. This is reflected in Pendle when Nelson and Colne are compared with smaller centres. Convenience goods retail and non-retail services perform an important role in all centres, serving relatively localised needs.

Service Uses

3.18 Service uses perform an important role in the overall offer of a centre and encourage customers to shop locally. Figures 3.3 and 3.4 below summarise the number and proportion of units in different service categories. The service uses are categorised as follows:

- Financial and professional services including banks, building societies, financial services, estate agents and employment agencies.
- Food/beverage uses including restaurants, cafés, pubs, bars and hot food takeaways.
- Other non-retail services including a wide range of uses, such as hairdressers, dry-cleaners, travel agents, beauty salons and post offices.

Figure 3.3 Distribution of food/beverage outlets (number of outlets)

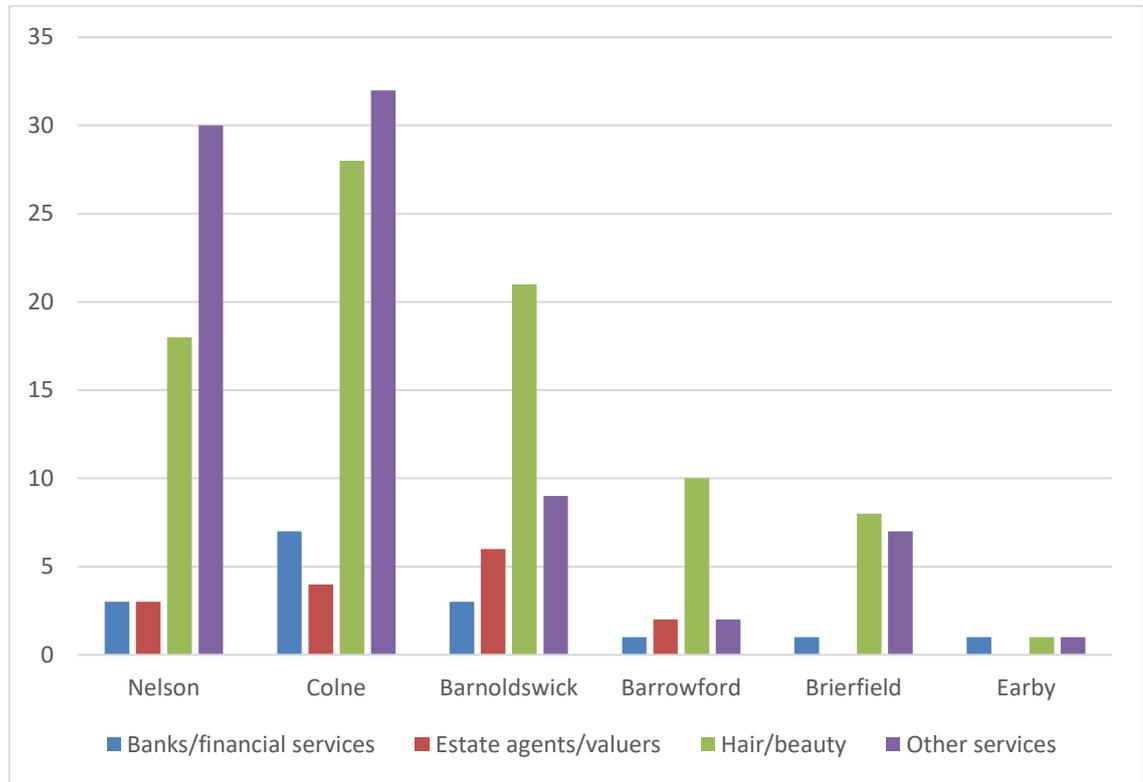


Source: Pendle Council's land uses survey 2022.

3.19 The number of food/beverage outlets available in centres is examined in more detail in Figure 3.4. Colne has a reasonable provision of restaurants and pubs/bar serving both the daytime and evening economy. Barnoldswick also has a reasonable provision of pubs/bar. The food/beverage offer in Nelson is predominantly hot food takeaways. The food/beverage offer in Brierfield and Earby is limited and predominantly hot food takeaways.

3.20 All centres except Earby have a reasonable range of other non-retail services, particularly hair/beauty salons, as shown in Figure 3.4.

Figure 3.4 Distribution of other non-retail service uses (number of outlets)



Source: Pendle Council’s land uses survey 2022

Summary

- 3.21 The analysis of the hierarchy of centres in this section indicates Pendle has a well-established network of centres that currently serve their respective areas. Nelson and Colne are the only centres with a truly borough-wide catchment area. The health of the main centres is assessed in more detail in Appendix 5.
- 3.22 The town centre vacancy rate has increased and is significantly above the national average in Nelson, Brierfield and Earby. Continuing to identify the hierarchy of centres in future development plans is important in terms of:
- ensuring the vitality and viability of centres is maintained and enhanced as important hubs for the community, through the application of the impact test;
 - directing retail and main town centre uses to appropriate accessible and sustainable locations, through the application of the sequential approach to site selection; and
 - identifying a viable role and strategy for each centre.
- 3.23 The network of centres should continue to be protected and enhanced to ensure appropriate accessibility to important facilities for all sections of the community and to ensure sustainable shopping patterns.

4.0 Retail and food/beverage need assessment

Introduction

- 4.1 This section updates the quantitative and qualitative need for retail uses within Pendle Borough. The National Planning Policy Framework (NPPF) indicates that local planning authorities should positively seek opportunities to meet the development needs of their area, and Local Plans should meet objectively assessed needs.
- 4.2 This section sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping and food/beverage (eating and drinking away from the home).

Assumptions and base data

- 4.3 All monetary values expressed in this study are at 2020 prices, consistent with Experian's base year expenditure figures for 2020, which are based on actual recorded expenditure levels rather than projections.

Study area zones and population

- 4.4 A household telephone survey was previously undertaken to quantify shopping patterns in 2006. A new household survey has been undertaken during September 2022. The study area includes areas outside the Pendle Borough boundary. The primary catchment areas of Barnoldswick and Earby will extend beyond the Borough to the north and northeast. The primary catchment areas of Nelson and Brierfield will extend beyond the Borough to the south. The study area has been sub-divided into five zones based on ward areas to reflect the primary catchment areas of the main centres in the Borough.
- 4.5 The projected population within each zone between 2022 to 2040 is set out in Table 1 in Appendix 2, based on Experian's latest 2020-base MMG 3 small area projections. The base year 2022 population within the Pendle study area is 113,187. This population is projected to increase to 116,268 by 2040, an increase of 2.7%.
- 4.6 Alternative population projections for Pendle based on the standard method suggest the Borough's population will reduce by just over 0.8% between 2022 and 2040. This standard method scenario aligns with the findings in the draft HEDNA (Iceni Projects). The implications of the potential decline rather than growth in population is addressed later in this section.

Retail Expenditure

- 4.7 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for the year 2020 have been obtained.
- 4.8 Experian's latest EBS national expenditure information (Experian Retail Planner Briefing Note 19 – January 2022) has been used to forecast expenditure within the Pendle study area. Experian's short term EBS growth forecast rates during 2021, 2022 and 2023 reflect current economic circumstances, including the Covid-19 crisis. The forecast changes during this period are as follows:
- convenience goods: -5.5%;

- comparison goods: +7.0%;
- leisure: +52.8%.

4.9 These short-term forecasts reflect post Covid lockdown re-adjustments. Convenience goods expenditure increased during the lockdowns with households eating out less often than before the pandemic. Comparison goods and leisure expenditure, including eating and drinking out, reduced significantly during the lockdowns, but these sectors are expected to recover during 2022 and 2023.

4.10 In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's medium and long-term growth average forecasts have been adopted, as follows:

- convenience goods: +0.1% per annum growth for 2024 and beyond;
- comparison goods: +2.8% per annum growth for 2024 to 2028 and +2.9% per annum after 2028; and
- leisure: +1.1% per annum growth for 2024 to 2028 and +0.9% per annum after 2028.

4.11 These growth figures relate to real growth and exclude inflation.

4.12 Experian's latest adjusted deductions for SFT (i.e. home and online shopping through non-retail businesses) in 2022 are:

- 5.7% of convenience goods expenditure; and
- 23.9% of comparison goods expenditure.

4.13 Experian's projections suggest that these percentages will increase to 6.5% and 26.1% by 2025, respectively. The long-term Experian projections suggest an increase to 7.7% and 30.1% by 2040, respectively.

4.14 Table 2 in Appendix 2 sets out the updated forecasts for spending per head on convenience goods within each zone in the study area up to 2040, excluding SFT. Average convenience goods expenditure is expected to reduce due to a higher proportional increase in SFT. Forecasts for comparison goods spending per capita are shown in Table 2 in Appendix 2 and food/beverage expenditure is shown in Table 2 in Appendix 3.

4.15 Based on forecast changes in population and per capita spending (excluding SFT), total convenience goods spending within the Pendle study area is forecast to increase by +2.3% from £251.34 million in 2022 to £257.1 million in 2040, as shown in Table 3 (Appendix 2).

4.16 Comparison goods spending is forecast to increase by +56.7% between 2022 and 2040, increasing from £296.12 million in 2022 to £464.08 million in 2040, as shown in Table 3 (Appendix 3).

4.17 Food and beverage spending is forecast to increase by +21.19% between 2022 and 2040, increasing from £136.99 million in 2022 to £166.94 million in 2040, as shown in Table 3 (Appendix 4).

Growth in turnover densities

4.18 Experian's Retail Planner Briefing Note 19, January 2021 indicates comparison goods retail sales floorspace is expected to increase its average sales density by +2.3% during 2023, and further growth is envisaged in the medium term (+2.2% per annum during 2024 to 2028), and longer term (+2.6% per annum beyond 2028). These increases have been adopted and will absorb much of the future expenditure growth. These growth rates are relatively high compared with historic forecasts but are consistent with the likely high increase in on-

line/home shopping through retail businesses i.e. the total sales of retail businesses will increase at a much higher rate than the amount of physical sales floorspace they provide.

4.19 For convenience goods retail, Experian indicates a 1.6% increase in sales densities during 2023; a small average increase of 0.1% per annum during 2024 to 2028; and no predicted growth in sales densities thereafter.

4.20 Experian does not provide projections for food and beverage sales densities. Future growth is assumed in line with leisure expenditure growth. Future growth reflects the necessary period of recovery required in this sector following the Covid-19 pandemic. An average growth rate of 0.5% per annum has been adopted.

Base year market shares

4.21 The turnover of facilities within Pendle Borough is estimated based on the market shares or penetration rates. To assess the capacity for new floorspace, penetration rates have been estimated for shopping and food/beverage facilities based on a household shopper survey undertaken in September 2022.

4.22 The market shares for convenience goods and comparison goods shopping are shown in Table 4 in Appendix 2 and Table 4 in Appendix 3, respectively. The market shares for food and beverage expenditure are shown in Table 4 in Appendix 4.

4.23 The household survey results suggest a relatively high level (over 74%) of expenditure retention within the study area for convenience goods shopping. The retention of comparison goods expenditure is much lower (about 56% in the study area) due to the draw of larger centres outside Pendle, primarily in Burnley. The retention of food/beverage expenditure is similar to comparison goods shopping at about 55% retention in the study area.

4.24 The results of the household shopper survey regarding main and top-up food and grocery shopping have been used to estimate existing convenience goods shopping patterns. The market shares in Table 4 in Appendix 2 are a combined rate for both main and top up shopping based on a 70:30 split. This 70:30 split is based on Lichfields' experience and is widely accepted in retail studies of this kind. The survey results suggest reasonably high levels (nearly 74%) of convenience goods expenditure retention within the study area, as shown in Table 4.1. These figures indicate that most residents tend to undertake their food and grocery shopping close to where they live albeit predominantly by car for main food shopping trips. The highest convenience foods expenditure leakage is from Zone 4 (Brierfield/Pendle South) predominantly to large food stores in Burnley.

Table 4.1 Food and grocery trip retention in the Pendle study area (% of all trips in zones)

Zone	Main last trip	Main other trip	Top-up	Combined market share
Zone 1 – Nelson	86.4	92.1	94.4	89.9
Zone 2 – Colne	99.1	88.5	99.6	97.2
Zone 3 – Barrowford/Pendle west	77.2	79.6	92.0	82.1
Zone 4 – Brierfield/Pendle south	41.4	33.2	36.5	38.3
Zone 5 – Barnoldswick/Earby	76.6	64.4	90.2	78.3

Source: NEMS household survey results September 2022

4.25 The top main food and grocery destinations were as follows (% market share of last main food shopping trips within all study area zones):

1	Morrisons, Pendle Street, Nelson	18.1%
2	Asda, Swinden RP, Colne	17.3%
3	Sainsbury’s, Windy Bank, Colne	11.9%
4	Aldi, Barnoldswick	8.5%
5	Aldi, North Valley RP, Colne	6.7%
6	Asda, Princess Way, Burnley	4.7%
7	Lidl, Rigby Street, Nelson	3.3%
8	Sainsbury’s, Active Way, Burnley	3.2%;
9	Lidl, Colne Road, Burnley	3.0%
10	Lidl, North Valley RP, Colne	2.8%

4.26 The market shares for comparison goods shopping in Table 4, Appendix 3 are based on a weighted average for each comparison goods category included within the household survey e.g. clothing/footwear, electrical, furniture, floorcoverings, DIY and health and beauty products. The survey results suggest lower, but still reasonable levels of comparison goods expenditure retention for all goods categories within most study area zones, as shown in Table 4.2.

Table 4.2 Non-food comparison trip retention (% of all trips in study area zones – excluding internet shopping)

Goods category	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5
Clothing and footwear	30.6	73.3	49.6	28.6	20.5
Domestic electric appliances	32.8	48.7	64.3	29.7	54.2
Other electrical goods	24.7	41.6	23.1	12.6	42.0
Furniture, floor-coverings, household textiles	79.3	77.5	58.4	42.8	57.5
DIY / hardware and garden items	91.3	93.4	87.1	84.3	76.1
Health and beauty items	90.1	91.2	74.9	29.6	65.8
Books and stationery	84.1	84.7	68.2	24.7	60.8
Games, toys, sports, hobby items, pet products	79.6	80.4	62.0	28.6	52.2
Other non-food	69.2	85.2	62.6	28.2	61.7
Combined market share	63.8	76.6	59.2	32.3	56.7

Source: NEMS household survey results September2022

4.27 The lowest levels of comparison goods expenditure retention (highest leakage or outflow) is from the south of the study area (Zone 4 - Brierfield), where leakage to Burnley is high. Leakage is relatively high across all other zones (23% to 43%), with the highest proportional retention in the central area of Pendle Borough (Zone 2 – Colne).

4.28 The survey results suggest good levels of expenditure retention for lower order comparison goods, such as DIY/hardware, health/beauty and books/stationery, but lower levels of retention for higher order goods, such as clothes and electrical goods.

4.29 The results of the household shopper survey regarding eating and drinking away from the home have been used to estimate existing food and beverage expenditure patterns. The market shares in Table 4 in Appendix 4 are a combined rate for both eating out and

drinking at pubs/bars are based on a 75:25 split. This 75:25 split is based on Lichfields' experience across the country.

- 4.30 The survey results also suggest reasonable levels of food/beverage expenditure retention across in Zones 1 (Nelson) and Zone 2 (Colne) for both eating and drinking, as shown in Table 4.3. As with shopping trips, leakage is highest from the south of the Borough (Zone 4 – Brierfield). Retention rates are marginally higher for drinking away from the home than eating out.

Table 4.3 Food and beverage trip retention (% of all trips in zones)

Zone	Eating out	Drinking away from home	Combined market share
Zone 1 – Nelson	42.6	55.6	45.8
Zone 2 – Colne	81.3	88.1	83.0
Zone 3 – Barrowford/Pendle west	74.3	85.1	77.0
Zone 4 – Brierfield/Pendle south	21.2	34.7	24.6
Zone 5 – Barnoldswick/Earby	56.1	70.9	59.8

Source: NEMS household survey results September 2022

Capacity for convenience goods retail floorspace

- 4.31 Based on the market shares calculated from the September 2022 household survey results, available convenience goods expenditure attracted to Pendle in 2022 is shown in Table 4 in Appendix 2. This has been projected forward to 2025, 2030, 2035 and 2040, and is summarised in Table 11 in Appendix 2. Convenience goods expenditure available to facilities within Pendle Borough is expected to increase from £205.72 million in 2022 to £210.27 million in 2040. This increase is due to population growth, which offsets the slight reduction in average expenditure per person (excluding SFT). A breakdown for the main centres is set out in Table 4.4.

Table 4.4 Convenience goods base year turnover in 2022

	Turnover £M
Zone 1 – Nelson	£62.51
Zone 2 – Colne	£104.77
Zone 3 – Barrowford	£7.21
Zone 4 – Brierfield	£2.88
Zone 5 – Barnoldswick	£24.83
Zone 5 – Earby	£3.52
Total	205.72

Source: Table 11 in Appendix 2

- 4.32 The benchmark turnover of food stores and convenience shops within the Borough is calculated in Table 11 in Appendix 2. The benchmark turnover is based on the sales area within each store and the respective company average sales densities. This turnover is not necessarily the actual turnover of the store, but it provides a useful benchmark to assess how well existing facilities are trading.

4.33 The combined benchmark turnover of identified food stores and other convenience goods shops within the main towns is estimated to be £203.81 million, compared with the estimated actual turnover of £205.72 million, as estimated from the household survey results. These estimates suggest convenience goods sales floorspace in the Borough is trading about 1% above the national average. Convenience goods shopping facilities within the Borough appear to be trading satisfactorily. However, there are variations across the Borough with facilities trading well in Barnoldswick and below average in Colne, Brierfield and Earby.

4.34 Table 11 in Appendix 2 subtracts the benchmark turnover of existing floorspace from available expenditure to calculate the amount of surplus/deficit expenditure that may be available for new development in the future. The figures indicate there is a projected convenience goods expenditure deficit of -£1.7 million at 2025, because population and expenditure growth will be offset by an increase in home shopping (SFT) and increases in sales densities. This expenditure deficit is projected to decrease marginally to -£1.43 million at 2030. Continued population growth reduces the deficit to a small surplus in 2035 of +0.17 million and to +2.16 million by 2040. These projections suggest there is limited capacity for additional convenience goods facilities over the new plan period. There is a projected over-supply of convenience goods retail floorspace in the short to medium term up to 2030.

4.35 The deficit/surplus expenditure projections are converted into floorspace estimates Table 11 in Appendix 2 based on an average sales density of £12,000 per sq.m net, which is an approximate average for the main food store operators. The results are summarised in Table 4.5.

Table 4.5 Convenience goods floorspace capacity (sq.m gross) - cumulative

Zone	2025	2030	2035	2040
Zone 1 – Nelson	221	234	294	377
Zone 2 – Colne	-767	-755	-658	-531
Zone 3 – Barrowford	106	104	109	109
Zone 4 – Brierfield	-221	-219	-216	-213
Zone 5 – Barnoldswick	563	571	589	606
Zone 5 – Earby	-102	-101	-98	-96
Total	-199	-166	20	252

Source: Table 12, Appendix 2

4.36 The deficit expenditure projections up to 2030 imply a combined over-supply of convenience goods floorspace in Pendle Borough of 166 sq.m gross in 2030, but long-term growth suggests a small under-supply of 252 sq.m gross in 2040.

4.37 The Pendle Retail Study Update 2012 predicted capacity for 2,196 sq.m gross of convenience goods retail floorspace by 2033. The updated and rolled forward floorspace projections are now lower due to lower population and expenditure growth and a higher proportion of home shopping expenditure.

4.38 As indicated earlier, the basis for the population growth, which underpins the standard method scenario assumes a 0.8% decline from 2022-2040, which aligns with the findings in the draft HEDNA (Iceni Projects). Experian’s projections suggest 2.7% growth in population during the same period. If the lower standard method population projections were adopted, then the convenience goods floorspace projection to 2040 would be -560 sq.m gross rather than +252 sq.m gross.

Qualitative need

- 4.39 Convenience goods retail provision in the Borough is set out in Table 10 in Appendix 2. Convenience goods sales floorspace totals nearly 20,000 sq.m net. Collectively designated centres and shopping frontages in Pendle Borough have 80 convenience goods outlets including food stores operated by multiple retailers and smaller independent shops. Residents across the Pendle have good access to a range and choice of food stores and there are no obvious areas of deficiency in food store provision, which reflects the high expenditure retention rates highlighted in Table 4.1.
- 4.40 Main shopping trips are generally made once a week or less often. The availability of a wide range of products and free car parking are important requirements for bulk food shopping trips. Large superstores, defined as over 2,500 sq.m net or more, are the usual destination for these types of shopping trip. There are three superstores (over 2,500 sq.m net) in the Borough i.e. Morrison's in Nelson (3,729 sq.m net), Asda (4,474 sq.m net) and Sainsbury's (4,307 sq.m net) in Colne. Asda, Sainsbury's and Tesco superstores in Burnley are also reasonably accessible for residents in the Borough.
- 4.41 In addition to these superstores, there is good choice of other large stores/supermarkets and smaller convenience stores in the Borough. The discount food sector is represented by Aldi and Lidl stores at Nelson and Colne and an Aldi in Barnoldswick. There are also three Co-op stores, two Farmfoods, a Tesco Express and a Booths store.
- 4.42 As indicated in Section 3, all centres have a reasonable proportion of convenience good retail uses. There are no obvious areas of deficiency in food store or convenience goods provision in Pendle Borough.

Capacity for comparison goods floorspace

- 4.43 Available comparison goods expenditure has been projected to 2025, 2030, 2035 and 2040 and is summarised in Table 11 in Appendix 3. Comparison goods expenditure available to facilities in Pendle is expected to increase from £182.86 million in 2022 to over £286.37 million by 2040.
- 4.44 Table 11 in Appendix 3 subtracts the turnover of existing floorspace including an allowance for growth in turnover densities. The projections suggest future growth in available expenditure will be offset by expected growth in turnover densities up to and beyond 2035 i.e. existing retail businesses will absorb expenditure growth. This assumption is consistent with Experian's projected growth in non-store sales taken by retail businesses. The growth in retail operator's turnover densities will in part be fuelled by on-line sales and click and collect, which will not directly affect the need for additional retail sales floorspace. The deductions already made for SFT only relate to non-store sales through non-retail businesses.
- 4.45 By 2025 there is a projected small expenditure deficit of -£1.34 million, which will increase to -£1.73 million by 2030 but this will reduce marginally to -£1.07 million in 2035 and then a small surplus of £2.57 million in 2040. These projections suggest growth in turnover densities will absorb expenditure growth and there is likely to be an over-supply of comparison goods retail floorspace up to and beyond 2035. The deficit/surplus expenditure projections have been converted into floorspace estimates Table 11 in Appendix 3. The results are summarised in Table 4.6.

Table 4.6 Comparison goods floorspace capacity (sq.m gross) - cumulative

Area	2025	2030	2035	2040
Zone 1 – Nelson	-92	-98	-36	198
Zone 2 – Colne	-210	-251	-144	244
Zone 3 – Barrowford	-13	-21	-17	-8
Zone 4 – Brierfield	-13	-13	-5	22
Zone 5 – Barnoldswick	-27	-27	-21	15
Zone 5 – Earby	-3	-3	-2	2
Total	-358	-413	-225	472

Source: Table 12, Appendix 3

- 4.46 The projections imply a combined over-supply of comparison goods floorspace of 413 sq.m gross in 2030, but this over-supply will reduce to 225 sq.m gross by 2035. There is a small projected under-supply of 472 sq.m gross by 2040.
- 4.47 The Pendle Retail Study Update 2012 predicted capacity for 11,852 sq.m gross of comparison goods retail floorspace up to 2033. The main reasons for this significant difference are Experian’s lower expenditure projections (including higher deductions for on-line shopping) and higher projected growth in turnover densities, resulting in less available expenditure for new floorspace.
- 4.48 The comparison goods floorspace projection to 2040 would be -1,251 sq.m gross rather than +472 sq.m gross if the lower standard method population projections were adopted.

Qualitative need

- 4.49 Comparison goods retail provision in the Borough is set out in Table 10 in Appendix 3. Comparison goods sales floorspace totals nearly over 57,000 sq.m net. Collectively centres and local shopping frontages in Pendle Borough have 227 comparison goods outlets with a total sales area of about 19,000 sq.m net, but these are predominantly small independent shops. The Borough has a good provision of large out of centre comparison good stores including Boundary Mill Outlet, with a large sales area of over 19,000 sq.m net Pendle Village has a sales area of over 5,700 sq.m net. Retail warehouse parks provide a further sales area of over 6,000 sq.m net. Comparison goods sales floorspace within food store totals over 6,500 sq.m net.
- 4.50 As indicated in Section 3, most centres have a reasonable proportion of comparison good retail uses, but the leakage of higher order comparison goods expenditure to larger centres such as Burnley is relatively high. The analysis of centres in Appendix 5 indicates the range and choice of comparison goods shops varies from centre to centre. Most categories of comparison goods shops are available in Nelson and Colne but the choice within some categories is limited. The range and choice of comparison goods shops in the rother smaller centres is more limited.
- 4.51 Overall, the accessibility for residents in Pendle Borough to a range and choice of comparison goods shopping destinations is reasonable due to large out of centre stores and the proximity of facilities in Burnley.

Capacity for food/beverage floorspace

- 4.52 Available food and beverage expenditure has been projected forward to 2025, 2030, 2035 and 2040, and is summarised in Table 10 in Appendix 4. The amount of expenditure

attracted to Pendle Borough is expected to increase from £81 million in 2022 to £98.46 million in 2040.

4.53 Table 11 in Appendix 3 subtracts the turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure available for new development. In 2025 there is a relatively small expenditure surplus of £1.88 million. However, continued population and expenditure growth creates an expenditure surplus of £4.67 million at 2030 increasing to £7.12 million by 2035 and £9.85 million by 2040. Floorspace capacity projections are shown in Table 11 in Appendix 4 and summarised in Table 4.7 below.

4.54 The projections suggest a combined small under-supply of food/beverage floorspace of 371 sq.m gross in 2025, which will increase to 1,801 sq.m gross in 2040.

Table 4.7 Food/beverage floorspace capacity (sq.m gross) - cumulative

	2025	2030	2035	2040
Zone 1 – Nelson	32	79	117	163
Zone 2 – Colne	146	357	535	740
Zone 2 - Other	18	44	66	92
Zone 3 – Barrowford	45	102	153	198
Zone 3 - Other	39	88	132	166
Zone 4 – Brierfield	6	15	22	29
Zone 4 - Other	6	14	21	29
Zone 5 – Barnoldswick	35	88	128	172
Zone 5 – Earby	20	49	72	95
Zone 5 - Other	24	60	88	119
Total	371	897	1,335	1,801

Source: Table 12, Appendix 3

4.55 The food/beverage floorspace projection to 2040 would be 1,245 sq.m gross rather than 1,802 sqm gross if the lower standard method population projections were adopted.

Qualitative need

4.56 Food/beverage provision in the Borough is set out in Table 10 in Appendix 4. Collectively the designated centres and local shopping frontages in Pendle Borough have 45 restaurants/café’s; 24 pubs/bars and 56 hot food takeaways. The centres within Pendle provide a good range and choice of pubs/bar and hot food takeaways but the provision of restaurants in most centres is relatively weak. Colne and Barnoldswick have the strongest provision of outlets serving the evening economy.

4.57 Overall, the accessibility for residents in Pendle Borough to a range and choice of food/beverage outlets is reasonable, although provision could be improved in most centres.

Operator space requirements

4.58 The Requirements List publishes potential space requirements for multiple town centre operators. The current list of operators who may have space requirements in Pendle Borough is as follows.

Nelson

- Aldi Supermarket 18,000 to 22,000 sq.ft

• Asda	Supermarket	3,500 to 40,000 sq.ft
• Mary Brown's	Fried chicken restaurant	1,800 to 3,000 sq.ft
• Burger & Sauce	Burger restaurant	1,500 to 2,200 sq.ft
• Sussex Beds	Bed Retailer	2,000 to 5,000 sq.ft
• Crispys	Burger and dessert restaurant	1,600 to 2,500 sq.ft
• Choppaluna	Salad bowls and smoothies	600 to 1,200 sq.ft
• Trek Bicycle	Bicycle company	4,300 to 6,500 sq.ft
• Jollibee	International Fast Food Chain	3,500 to 4,000 sq.ft

Colne

• Aldi	Supermarket	18,000 to 22,000 sq.ft
• Subway	Sandwiches and salads	500 to 2,000 sq.ft
• Dominos	American pizza restaurant chain	850 to 2,500 sq.ft
• Lidl	Supermarket	18,000 to 26,000 sq.ft

Barnoldswick

• Lidl	Supermarket	18,000 to 26,000 sq.ft
--------	-------------	------------------------

4.59 In total there are only 12 operators listed as having potential space requirements in Pendle Borough, as follows:

• Convenience goods retailers	3
• Comparison goods retailers	2
• Food/beverage operators	7

4.60 Many of these listed requirements are likely to be generic interest in centres of a similar size across the northwest region rather than specifically in Pendle. Despite the strong current provision, there appears to be further interest from the discount food sector. The older discount stores i.e. Lidl in Nelson and Aldi in Colne are smaller than the operator's current standard space requirement (at least 1,200 sq.m net) and replacement larger store may be considered.

4.61 Consistent with the floorspace capacity projections, operator demand for the comparison goods retail sector is weak and there is higher demand from the food/beverage sector.

5.0 Leisure, entertainment and cultural uses

Introduction

5.1 This section assesses the need for other main town centre uses including commercial leisure, entertainment and cultural uses i.e. cinema/multiplex, tenpin bowling, bingo, theatres, nightclubs and private health and fitness clubs. Main town centre uses, as defined within the NPPF glossary, excludes less intensive sports and recreation uses such as swimming pools, sports halls and sports pitches, and therefore the need for these uses has not been assessed in this study. The demand for office uses (now included in the new Use Class E) needs to be assessed in the context of the wider need for Class B employment uses, as part of an employment land review.

5.2 Residents in Pendle Borough have a relatively good range of commercial leisure and entertainment uses within the authority area and within Burnley.

Leisure and cultural expenditure

5.3 Experian local expenditure data for the Pendle study area indicates the resident population generates £22.27 million in 2022 (an average of about £197 person) on selected cultural, recreational and sporting services, broken down as follows:

- cinema admissions £1.89 million;
- live entertainment i.e. theatre/concerts/shows £4.07 million;
- museums, theme parks, houses and gardens £1.93 million;
- admissions to clubs, dances, discos, bingo £2.29 million;
- other miscellaneous entertainment £2.09 million;
- subscriptions to sports and social clubs £5.32 million; and
- leisure class fees £4.68 million.

5.4 Not all leisure/cultural spend from residents will be spent in Pendle Borough. The household survey results have been used to estimate the household participation rates and the retention for leisure trips within the study area, as shown in Table 5.1. Less than 15% of households do not participate in any of the nine leisure activities explored by the household survey.

Table 5.1 Leisure participation and trip retention (% of households in the study area)

Leisure activity	% Households participating	% Trips attracted to Pendle Borough
Cinema	38.2	0.8
Theatre	26.0	33.2
Nightclubs/live music venues	13.3	29.2
Bingo	2.7	50.2
Bookmakers	2.5	56.6
Gyms/health and fitness club	28.3	72.9
Tenpin bowling/ gaming	16.1	0.0
Trampoline parks	14.6	2.0
Museums and art galleries	31.1	2.4

Source: NEMS household survey results September 2022

- 5.5 The participation and retention rates vary significantly for each activity. Many residents travel outside the study area e.g. to Burnley, Blackburn, Blackpool and Manchester for some leisure activities. The retention rate is highest for trips to health/fitness and bingo clubs.
- 5.6 Taking these leisure trip retention rates into account and the split of cultural/entertainment expenditure shown above, it is reasonable to assume Pendle currently retains about 50% of resident's total leisure expenditure within the study area, due to the Borough's proximity to other leisure destination in Burnley. Based on this estimated 50% market share, attracted leisure expenditure in 2022 is about £11.1 million.
- 5.7 Residents in Pendle Borough have a reasonable range of commercial leisure and entertainment uses and there is good provision within Burnley.

Leisure/cultural floorspace capacity

- 5.8 Experian's expenditure projections suggest leisure expenditure per person should increase in real terms by +8.7% between 2022 to 2030; +13.6% between 2022 to 2035; and by +18.8% between 2022 to 2040. With population growth (+1.3% by 2030; +1.9% by 2035 or +2.7% by 2040) on these leisure/cultural activities expenditure should increase from £22.3 million in 2022 to £24.6 million by 2030; £25.8 million by 2035 and then £27.2 million in 2040, an additional £2.3 million by 2030, £3.5 million by 2035 or £4.9 million by 2040. As a minimum, it is reasonable to assume Pendle Borough can continue to retain 50% of this expenditure growth i.e. about £2.5 million in 2040. However, there should be potential for the Borough to increase its market share of expenditure growth. The development strategy could seek to retain 60% of the future expenditure growth, which is more consistent with the market share for retail and food/beverage expenditure. On this basis, retained expenditure growth could be £1.4 million in 2030, £2.1 million in 2035 increasing to £2.9 million in 2040.
- 5.9 Based on Lichfields experience, leisure floorspace normally trades on average around £2,000 per sq.m gross. If leisure/cultural expenditure attracted to Pendle Borough increased by £1.4 million by 2030, £2.1 million by 2035 and then £2.9 million in 2040, as indicated above, then this additional expenditure could support about 700 sq.m gross of new commercial leisure and cultural floorspace by 2030, based on an assigned average of £2,000 per sq.m, increasing to about 1,000 sq.m gross by 2035 and then to 1,500 sq.m gross by 2040.
- 5.10 The leisure/cultural floorspace projection to 2040 would be about 1,000 sq.m gross rather than 1,500 sq.m gross if the lower standard method population projections were adopted.
- 5.11 This analysis provides a broad brush global floorspace capacity analysis. A more detailed sector by sector assessment is set out in the remainder of this section.

Cinemas

- 5.12 Cinema admissions in the UK reached a peak of 1.6 billion trips in 1946. However the number of trips declined steadily during the 1950s, 1960s and 1970s, a period when the ownership of televisions increased significantly. Cinema admissions continued to decline in the early 1980s dropping to only 54 million trips in 1984 but increased steadily after 1984 up to 2002. There was a peak in cinema admissions in 2002 at 175.9 million. Total admissions reduced to 157.5 million in 2014 but increased slowly to 176 million in 2019 (Source: British Film Institute). Cinema trips have not increased significantly since 2002, despite population growth of 9.6% during this period (59.4 million to 66.6 million). The

national average visitation rate was about 2.6 trips per person per annum, before the Covid crisis. The number of trips during the Covid-19 crisis reduced significantly. This cinema assessment assumes trip levels will return to pre-Covid levels in the future (2.6 trips per person per annum).

- 5.13 The BFI identifies 843 cinema facilities with 4,596 screens and 937,161 seats in the UK. Lichfields' national CINESCOPE model assesses the provision of cinema screens/seats against projected customer cinema trips across the country, to identify areas of under and over-provision. The national average is about 38,000 cinema trips per annum for each cinema screen or 190 trips per annum for each seat available.
- 5.14 Population in the Pendle study area is 113,187, which based on the national averages above, would generate 294,000 cinema trips, which could theoretically support 7.7 cinema screens or 1,547 cinema seats. However, not all of these cinema trips will be retained within Pendle, therefore the theoretical capacity will be much lower than 7.7 screens.
- 5.15 Experian's local expenditure data indicates the Pendle study area generates £1.89 million on cinema trips. This expenditure estimate appears to be consistent the 294,000 cinema trips estimated above, because it implies an average of £6.40 per person each trip. This figure suggests the cinema visitation rate in the Pendle study area is around the national average (2.6 trips per annum per person).
- 5.16 There is no full time cinema in Pendle Borough. The ACE Centre in Nelson was a part time cinema and has not re-opened since the Covid-19 lockdowns. Most households in the study area visit the Reel Cinema in Burnley which has 9 screens and 1,090 seats. Other destinations included the Everyman cinema in Clitheroe (4 screens and 256 seats) and the Plaza in Skipton (1 screen and 320 seats). Vue Cinema in Blackburn has 10 screens and over 1,600 seats and Vue Cinema in Accrington has 4 screens and 800 seats.
- 5.17 Population within the Pendle study area is projected to increase marginally to 116,268 by 2040, which could generate 302,000 cinema trips in total. These trips could in theory support 7.9 cinema screens or 1,589 seats. If Pendle Borough attracted 60% of these trips (181,000 trips) then the theoretical capacity in the Borough would be 4.7 screens or 953 seats.
- 5.18 Existing cinema provision in Burnley, Clitheroe and Skipton may limit operator demand for a new facility within the study area. Furthermore, the longer-term impact of Covid-19 on the number of cinema trips may reduce this theoretical capacity if the average visitation rate reduces from 2.6 trips per person.

Theatres, nightclubs, live music and other cultural activities

- 5.19 The household survey results indicate a relatively low proportion (26%) of respondents in the study area visit theatres. About 31% visit museums/art galleries. Only 13% visit nightclubs/live music venues.
- 5.20 The UK Theatre and Society of London Theatres (SOLT) indicated their member organisations (223) presented nearly 63,000 performances attracting over 34.35 million tickets visits, generating ticket revenue of £1.28 billion in 2018. The average ticket revenue per venue is £5.7 million. The UK average attendance per performance is 545.
- 5.21 Experian's local expenditure data indicates the Pendle study area only generates £4.07 million on live theatre, concerts and shows. Based on the average ticket revenue per venue (£5.7 million). Pendle's local population generates theoretical demand for only one venue.

- 5.22 Pendle’s existing provision includes The Muni Theatre, Hippodrome and Little Theatre in Colne and the ACE centre in Nelson. This provision appears to be above the theoretical demand generated by the Borough’s indigenous population, which suggest a significant net inflow of theatre trips into the Borough. Based on the existing provision there is no clear need for additional facilities.
- 5.23 The nightclub sector has struggled in recent years. IBISWorld (providers of global industry research) suggests these venues have lost their competitive advantage over pubs or bars, with lower prices and a more relaxed atmosphere. Approximately one-quarter of nightclubs have closed in the past decade as operators have struggled to respond to new challenges from regulation, licensing, planning, business rates and policing.
- 5.24 Experian suggests leisure expenditure on admissions to clubs, dances, discos etc is only £2.29 million within the Pendle study area. Access to nightclubs in Burnley and Manchester is also likely to limit demand for additional facilities in the Borough.
- 5.25 Experian’s local expenditure data indicates the Pendle study area only generates £1.93 million on museums, theme parks, houses and garden. Leisure expenditure, including population growth, is projected to increase by 22% by 2040. This growth would generate only an additional £0.4 million by 2040.
- 5.26 Pendle’s existing provision of museums/galleries and other attractions, including Bancroft Mill Engine Museum, Barnoldswick and Pendle Heritage Centre, Barrowford attracts a small proportion its visitors from the Borough’s the indigenous population. There may be additional potential demand from tourist visitors, which is difficult to quantify.
- 5.27 Based on Pendle’s population, there is no clear qualitative or quantitative need for additional theatre, music/nightclub or cultural provision. However, there may be potential to increase Pendle’s market share and attract more demand from tourist visitors if provision is improved. The development strategy for this entertainment and cultural sector needs to be flexible to respond to emerging opportunities for attractive new facilities of this kind.

Health and fitness clubs

- 5.28 The 2019 State of the UK Fitness Industry Report revealed that the UK health and fitness industry was continuing to grow pre-Covid. In 2019 there were more than 10 million fitness members in the UK and the industry was worth £5 billion, with a participation rate of 15.6%. The sector has more clubs, more members and a greater market value than ever before. The 2019 report highlighted that the industry experienced growth over the twelve-month period to the end of March 2019, with an increase of 4.7% in the number of memberships and 2.9% growth in the number of facilities.
- 5.29 The household survey results indicate over 28% of households visit health and fitness gyms. The survey results also suggest Pendle retains nearly 73% of gym trips in the study area equating to a catchment population of about 182,600 in 2022.
- 5.30 The Sport England/Active Places data indicates that there are 17 registered health and fitness facilities in Pendle, with 824 fitness stations as shown in Table 5.2. Pendle study area population (113,187 in 2022) suggests an average of 7.3 fitness stations per 1,000 people.
- 5.31 The North West Region has 1,021 Sport England registered health and fitness facilities with 60,899 fitness stations (average of 60 stations per facility). This existing provision equates

to about 8.2 registered fitness stations per 1,000 people in the North West Region. These figures suggest Pendle Borough has a reasonable provision of health and fitness facilities.

5.32 Demand for additional facilities within Pendle Borough should arise from future population growth and/or increased participation rates. Population within the study area is projected to increase to 116,268 in 2040, an additional 3,081 people. Based on the regional average of 8.2 fitness per 1,000 people, the study area population in 2040 could support 953 fitness station, compared with existing provision of 824 fitness stations, an additional 129 fitness stations or about two medium sized facilities.

Table 5.2 Pendle health and fitness facilities (Active Places, September 2022)

Name	Type	No. Fitness Stations
Pure Gym, Colne	Registered Membership use	220
Ultimate Strength & Fitness, Nelson	Pay and Play	85
Intershape Fitness, Market Street, Colne	Registered Membership use	80
Oaks Leisure Club, Brierfield	Registered Membership use	55
Pendle Leisure Centre, Colne	Registered Membership use	50
The Leisure Box, Brierfield	Pay and Play	50
Pendle Wavelength, Nelson	Registered Membership use	45
Earby Fitness Mill, Earby	Registered Membership use	40
Intershape Fitness, Albert Road, Colne	Pay and Play	32
Rolls Royce Leisure Centre, Barnoldswick	Registered Membership use	32
West Craven Sports Centre, Barnoldswick	Pay and Play	28
Bodies in Motion, Nelson	Registered Membership use	25
Seedhill Athletics & Fitness Centre, Nelson	Sports Club/Community Assoc.	25
Nelson and Colne College, Nelson	Sports Club/Community Assoc.	17
Marsden Heights Community College, Nelson	Sports Club/Community Assoc.	14
Pendle Vale College, Nelson	Private Use	13
St John Fisher/Thomas More High School, Colne	Private Use	13
Total		824

Source: Sport England

5.33 In addition to population growth translated into fitness stations, an alternative approach could be based on Experian leisure expenditure projections. The Pendle study area population generates £5.32 million on subscriptions to sports and social clubs, which equates to about £6,500 per fitness station.

5.34 Based on population and Experian’s leisure expenditure projections, expenditure on this activity in the Pendle study area should increase from £5.32 million in 2022 to £6.49 million in 2040, an additional £1.17 million. Based on £6,500 per fitness station, this additional expenditure could support 180 new fitness stations by 2040, or three medium sized facilities. This alternative projection is marginally higher than the 129 fitness stations suggested above.

Tenpin bowling and other indoor leisure innovations

5.35 As indicated in Section 2, freed-up space in town centres has provided new opportunities for leisure uses. Vacated premises have been reconfigured and reused for trampolines, climbing, indoor golf, escape rooms etc. These and other innovations are likely to continue in the future because landlords will adopt a flexible approach to respond to arising opportunities.

- 5.36 There are no tenpin bowling/family entertainment facilities in Pendle Borough. The nearest facilities are tenpin outlets in Burnley (MFA Bowl – 19 lanes), Blackburn (Tenpin Peel Leisure Park – 24 lanes) and Skipton (Matrix Superbowl – 8 lanes). Boiler House Bowling is a new four lane facility part of the Holmes Mill leisure complex in Clitheroe.
- 5.37 The Pendle study area’s future 2040 population (116,268) would theoretically only support less than 10 lanes, based on the national average of one lane per 12,000 people. There is theoretical capacity for a small tenpin bowling/family entertainment facility in Pendle Borough, but provision in Burnley may limit operator demand for a new facility.
- 5.38 Indoor trampoline centres are a relatively new leisure activity in the UK. In America outdoor trampoline centres were popular in the late 1950s and 1960s. This format first seen in America has been adopted and modernised and is now becoming a popular indoor leisure activity for a variety of age groups in the UK. The UK’s first indoor trampoline centre was opened by Bounce in 2014.
- 5.39 Trampoline centres offer a new, recreational experience for both children and adults. They typically have over 100 interconnected trampolines on site, consisting of differing courts for all ages and abilities, as well as an arcade and party rooms.
- 5.40 The household survey results indicate 14.6% of respondents in the study area visit trampoline centres. Trampoline destinations mentioned by households participating in this activity were:
- Flip Out, Blackburn (24%)
 - Air Unlimited, Burnley (21%)
 - The Jump Works, Accrington (29%)
 - Fusion Trampoline Park, Preston (4%)
- 5.41 There may be potential scope for further provision in Pendle Borough, but this sector is still relatively new and its potential for continued growth is unclear. Pendle’s strategy should be flexible to respond to any emerging demand for a trampoline centre.

Bingo, games of chance and gambling

- 5.42 Gala (now Buzz Bingo) and Mecca are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises (i.e. converted cinemas) into purpose-built units. Bingo clubs have become increasingly sophisticated and have actively sought to attract all age groups. The bingo sector usually prefers central locations that are accessible by public transport and by foot. However, the significant increase in on-line gambling has, and will continue to affect this sector.
- 5.43 The Gambling Commission indicates there are 646 bingo facilities in Great Britain (2020) and 156 casinos. This equates to approximately one bingo facility per 75,000 adults, and one casino per 330,000 adults.
- 5.44 There are no main bingo facilities in Pendle Borough, but bingo events are held at other venues on a part time basis. The nearest major facilities are Buzz Bingo in Burnley, Blackburn and Keighley.
- 5.45 The household survey results suggest the bingo participation rate is only 2.7% of households, which is much lower than the UK average participation rates of around 5%. However, Pendle’s market share of bingo trips in the study area is over 50%. The adult

population (about 87,000 in 2022) in the study area is theoretically capable of supporting one bingo facility and 0.3 casinos, based on the UK averages. However, the low participation and retention rates indicate there may be limited operator demand for a facility in Pendle Borough.

Conclusions on commercial leisure uses

- 5.46 The leisure, entertainment and cultural sectors are fragmented and innovative. In addition to the main leisure and entertainment uses outlined above, there are a larger number of other activities that could be promoted e.g. nightclubs, museums, art galleries, exhibition space, tourist attractions and new emerging leisure activities such as escape rooms and virtual golf centres. The representation of these emerging uses is relatively limited in Pendle. Given the fragmented nature of these sectors it is difficult to precisely quantify the potential demand for these uses over the next 15 years.
- 5.47 In global terms future expenditure growth could support new commercial leisure and cultural floorspace in Pendle of:
- about 700 sq.m by 2030;
 - about 1,000 sq.m by 2035; or
 - about 1,500 sq.m by 2040.
- 5.48 The leisure/cultural floorspace projection to 2040 would be about 1,000 sq.m gross rather than 1,500 sq.m gross if the lower standard method population projections were adopted.
- 5.49 This additional floorspace could include:
- 2 or 3 additional medium sized health and fitness facilities (120 to 180 new fitness stations);
 - small scale tourist attractions/cultural facilities such as museums/galleries; and
 - a bingo facility and other new leisure innovations e.g. trampolines, indoor climbing, escape rooms, virtual sport activities.
- 5.50 The development strategy should be flexible to respond to emerging opportunities for new leisure, entertainment and tourist related facilities. The opportunities to reoccupy vacated retail space should be considered.

6.0 Implications for future policy

Accommodating growth and change

National Guidance

- 6.1 For planning policies, local authorities are still required to support the role of town centres and the three main areas policies should focus on:
- 1 defining a network and hierarchy of centres, allowing them to grow and diversify;
 - 2 defining the extent of centre boundaries and primary shopping areas, making clear the uses permitted in these locations; and
 - 3 allocating a range of suitable sites to meet the scale and type of development needed for at least 10 years ahead, sites should be allocated consistent with the sequential approach i.e. town centre, then edge-of-centre followed by accessible out-of-centre sites.
- 6.2 The NPPF acknowledges the rapid changes that are affecting town centres. It recognises that diversification is key to the long-term vitality and viability of town centres, including the need for residential development. Accordingly, planning policies should clarify the range of uses permitted in such locations, as part of a positive strategy for the future of each centre. However, as indicated in Section 2, the recent changes to the UCO and PDR significantly restrict the Council's ability to control the mix of uses within centres through a plan-led approach.
- 6.3 The importance of a mix of retail and other town centre activity has increased in recent years and town centres increasingly need to compete with on-line shopping. Town centres need a better mix of uses that extend activity throughout the daytime and into the evenings.
- 6.4 The NPPF's presumption in favour of sustainable development remains. For plan-making this means that plans should positively seek opportunities to meet the development needs of their area and be sufficiently flexible to adapt to rapid change. It is widely accepted that very long-term projections have inherent uncertainties. In response to these uncertainties, local planning authorities are no longer required to allocate sites to meet the need for town centre uses over the full plan period. The need for new town centre uses over a minimum ten-year period reflects the complexities in bringing forward town centre development sites. In line with the Government's economic growth agenda, a positive approach to meeting community needs is still required.
- 6.5 Applications for retail and town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan will need to be assessed against the sequential and impact tests.
- 6.6 The sequential test in the NPPF indicates main town centre uses should locate in town centres, then in edge of centre locations; and only if suitable sites are not available (or expected to become available within a reasonable period) should out of centre sites be considered (para. 87). When considering edge of centre and out of centre proposals, preference should be given to accessible sites which are well connected to the town centre. Applicants and local planning authorities should demonstrate flexibility on issues such as format and scale, so that opportunities to utilise suitable town centre or edge of centre sites are fully explored (para. 88).

- 6.7 The NPPF states that local planning authorities should require an impact assessment for applications for retail and leisure development outside of town centres, which are not in accordance with an up-to-date development plan and are over a proportionate, locally set floorspace threshold. If there is not a locally set threshold, the default threshold is 2,500 sq.m (para. 90). Where an application fails to satisfy the sequential test or is likely to have a significant adverse impact, it should be refused (para. 91).
- 6.8 The appropriate balance between retail and other town centre activity has been debated in recent years, as town centres increasingly need to compete with on-line shopping. On-line shopping is likely to grow faster than previously expected due to shifts in customer behaviour accelerated by the Covid-19 crisis. The need for a better mix of uses within town centres has become increasingly important. A broader mix of uses should extend activity throughout the daytime and into the evenings.
- 6.9 As set out in Section 2, the Use Classes Order (UCO) was significantly amended in September 2020 and changes to permitted development rights were introduced in August 2021. These changes will have significant implications for shop frontage planning policies, restricting the ability of local planning authorities to control the mix of uses.
- 6.10 The expenditure projections in this study take into account home shopping made through non-retail businesses, because special forms of trading (sales via the internet, mail order, stalls and markets) have been excluded. The assessment adopts Experian's latest information and projections and assumes that special forms of trading will increase in the future, including the growth of internet shopping.

Floorspace capacity projections

- 6.11 The assessment of the potential for new retail, food/beverage floorspace within the previous sections suggests there is modest long-term scope for new development within Pendle Borough, and much less potential if standard method population projections were adopted. Tables 6.1, 6.2 and 6.3 below summarise the higher floorspace requirements in Pendle Borough up to 2030, 2035 and 2040 (cumulative).
- 6.12 These projections assume Pendle Borough can maintain its market share of expenditure in the future. This approach recognises that additional development within Pendle Borough could help to increase the area's market share, but this increase will be counter-balanced by development within competing centres. A balanced and sustainable approach has been adopted.
- 6.13 Table 6.1 indicates there is a small combined projected requirement for all main centres of 111 sq.m gross of retail and food/beverage floorspace in 2030. By 2035 the combined requirement increases to 822 sq.m gross and then to 2,121 sq.m gross in 2040. However, the availability of existing vacant floorspace needs to be considered.
- 6.14 Development plans should identify the scale of need for main town centre uses and assess whether the need can be met on town centre sites or through the expansion of centres. The NPPF indicates that local plans should allocate a range of suitable sites to meet the scale and type of retail, leisure and other development needed in town centres for at least 10 years. In this case projections beyond 2035 will need to be considered allowing time for future policy to be formulated and adopted. To accommodate growth, local planning authorities should keep town centre boundaries under review.

Table 6.1 Summary of retail and food/beverage floorspace requirements up to 2030 (sq.m gross)

Zone	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food/ beverage (sq.m gross)	Total (sq.m gross)
Zone 1 – Nelson	234	-98	79	215
Zone 2 – Colne	-755	-251	357	-649
Zone 3 – Barrowford	104	-21	102	185
Zone 4 – Brierfield	-219	-13	15	-217
Zone 5 – Barnoldswick	571	-27	88	632
Zone 5 – Earby	-101	-3	49	-55
Total	-166	-413	690	111

Table 6.2 Summary of retail and food/beverage floorspace requirements up to 2035 (sq.m gross)

Zone	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food/ beverage (sq.m gross)	Total (sq.m gross)
Zone 1 – Nelson	294	-36	117	375
Zone 2 – Colne	-658	-144	535	-267
Zone 3 – Barrowford	109	-17	153	245
Zone 4 – Brierfield	-216	-5	22	-199
Zone 5 – Barnoldswick	589	-21	128	696
Zone 5 – Earby	-98	-2	72	-28
Total	20	-225	1,027	822

Table 6.3 Summary of retail and food/beverage floorspace requirements up to 2040 (sq.m gross)

Zone	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food/ beverage (sq.m gross)	Total (sq.m gross)
Zone 1 – Nelson	377	198	163	738
Zone 2 – Colne	-531	244	740	453
Zone 3 – Barrowford	109	-8	198	299
Zone 4 – Brierfield	-213	22	29	-162
Zone 5 – Barnoldswick	606	15	172	793
Zone 5 – Earby	-96	2	95	1
Total	252	472	1,397	2,121

Source: Tables 12 in Appendix 2, 3 and 4.

- 6.15 The combined floorspace projection to 2040 would be -857 sq.m gross rather than +2,121 sq.m gross if the lower standard method population projections were adopted. As indicated in Section 2, long term projections have inherent uncertainties, but it is better to plan for higher growth and then modify the strategy later if levels of growth are lower than originally predicted.
- 6.16 The emerging Local Plan should seek to identify and accommodate growth for at least 10 years. Given the uncertainties relating to very long-term projections, the emerging Local Plan could address floorspace projections up to 2035 rather than 2040.

- 6.24 The floorspace projections suggest there is a need to retain the existing stock of shop premises within some designated centres to accommodate future growth in the food/beverage, leisure and cultural sectors i.e. Barnoldswick and Barrowford. Some contraction of centres where the shop vacancy rate is significantly higher than projected growth could be considered i.e. in Nelson, Brierfield and Earby.
- 6.25 The future strategy should be flexible to respond to new investment that cannot be accommodated in vacant units. Some redevelopment, refurbishment and expansion may be required in addition to the reoccupation of vacant units, ideally within town centres to accommodate future investment opportunities.

Hierarchy of centres

- 6.26 The network of town centres is currently set out in the Pendle Local Plan. Continuing to identify the hierarchy of centres in the Local Plan is important in terms of:
- 1 ensuring the vitality and viability of town and local centres is maintained and enhanced as important hubs for the community, through the application of the impact test;
 - 2 directing retail and main town centre uses to appropriate accessible and sustainable locations, through the application of the sequential approach to site selection; and
 - 3 identifying a viable role and strategy for each centre.
- 6.27 The analysis of centres in Section 3 and Appendix 5 indicates that no amendments to the hierarchy of centres is necessary. The boundaries of Pendle's town and local shopping centres should continue to be defined on the Proposals Map.
- 6.28 Barnoldswick, Colne and Nelson should continue to be designated as Town Centres at the top of hierarchy. Their role will continue to provide the focus for retail development in Pendle serving communities within the wider borough and beyond. These centres are the most accessible centres, supporting the largest range of services, job opportunities and sources of recreation.
- 6.29 The network of town centres, local shopping centres and local shopping frontages should continue to be protected and enhanced to ensure appropriate accessibility to important facilities for all sections of the community and to ensure sustainable shopping patterns. Nelson and Colne are the largest and dominant town centres in the Borough, consistent with their designation as Town Centres. The retail and food beverage floorspace capacity projections up to 2040 suggest over 56% of the projected floorspace capacity could be provided in Nelson and Colne. Barnoldswick is smaller than Nelson and Colne but much larger than the three Local Shopping Centres, which is also consistent with its designation as a Town Centre.
- 6.30 Barrowford, Brierfield and Earby Local Shopping Centres all play an important role as a focal point in their respective areas, but do not offer the same range and choice of facilities available within the three Town Centres. These centres should continue to be designated as Local a Shopping Centres that will provide important local access to lower order retail for their communities and surrounding hinterland. This will reduce the need for residents to travel and increases opportunities for social interaction and supports local jobs.
- 6.31 It is appropriate to continue to differentiate these town centres from the smaller Local Shopping Centres in the Borough. The retail and food beverage floorspace capacity projections up to 2040 suggest there is potential for modest growth in the Local Shopping Centres.
- 6.32 The NPPF Annex 2 Glossary indicates:

“References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance.”

- 6.33 Local Shopping Frontages in Pendle have limited facilities and may be under threat if shop/service closures occur in the future e.g. Manchester Road in Nelson. These frontages should continue to be protected because they help to ensure all residents have access to local facilities within walking distance.

Impact and sequential tests

- 6.34 Local Plan policy should set out the sequential and impact tests and which designated centres need to be considered. The NPPF states that, when assessing applications for retail and leisure development outside of town centres and not in accordance with an up-to-date local plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set threshold.

Impact threshold

- 6.35 The NPPF indicates, if there is no locally set threshold, then the default impact threshold is 2,500 sq. m gross. The PPG provides guidance on setting locally appropriate thresholds, and indicates it will be important to consider:
- the scale of proposals relative to town centres;
 - the existing viability and vitality of town centres;
 - cumulative effects of recent developments;
 - whether local town centres are vulnerable;
 - the likely effects of development on any town centre strategy; and the impact on any other planned investment.
- 6.36 The PPG also states that where authorities do not have their own floorspace thresholds for impact assessments in local development plans, national policy requires impact assessments to be submitted for retail and leisure developments over 2,500 sq.m gross. The PPG acknowledges the need to consider the impact of proposals below this floorspace threshold, e.g. if they are large developments when compared with the size of a nearby centre, or likely to have a disproportionate effect or ‘tip the balance’ of a vulnerable centre.
- 6.37 The NPPF minimum threshold of 2,500 sq.m gross is an inappropriate threshold for Pendle Borough because this scale of development would exceed the overall long-term retail/food beverage/leisure projections in all centres in the Borough. The lower retail capacity projections, relatively high vacancy rates in some centres and uncertainties about the post-Covid recovery suggest town centres are now more vulnerable to out-of-centre developments.
- 6.38 Given the overlapping nature of catchment areas in Pendle, a consistent impact threshold should be applied across the authority area. Based on the relatively low, and in some cases negative, floorspace capacity projections set out in Tables 6.1, 6.2 and 6.3 a lower impact threshold in line with the Sunday trading limit (around 400 sq.m gross or 280 sq.m net sales) is appropriate to protect the vitality and viability of designated centres in Pendle.
- 6.39 All retail and leisure developments over 400 sq.m gross (combined) proposed outside or on the edge of designated town and local centres should be required to prepare a proportionate impact assessment, including retail and leisure uses included within mixed use allocations.

The level of detail required in the impact assessment will vary case-by-case and it is for the applicant to provide robust justification that their impact assessment is robust, appropriate and proportionate.

Implications of UCO changes for the impact and sequential tests

- 6.40 Retail and leisure uses previously related to use classes A1 to A5 and D2 leisure uses. Changes to the UCO may lead to confusion, at least until the NPPF is amended to reflect the UCO changes. For example, not all uses within the new Class E are retail or leisure uses, requiring an impact assessment i.e. offices and medical uses. Bearing in mind the potential for confusion arising from the UCO changes and for consistency with the NPPF, Local Plan policies relating to the impact test should refer to retail and leisure uses rather than Class E within the new UCO.

Sequential test floorspace threshold

- 6.41 The NPPF does not refer to a minimum floorspace threshold where the sequential test will be applied in the same way as the impact test. All main town centre uses regardless of scale are required to comply with the sequential test. However, the PPG suggests some certain main town centre uses have “particular market and locational requirements that mean they may only be accommodated in specific locations”, but robust justification must be provided to satisfy the sequential test in this respect. This approach may allow local facilities to be provided in areas that may be poorly served and/or within mixed use development to provide facilities catering for the local needs of the development, without needing to consider the sequential test.

Town and local centre boundaries

- 6.42 Development plan should define clear boundaries for town and local shopping centres on the Proposals Map. Designated town and local shopping centre boundaries, where possible, should be tightly drawn to assist in controlling the appropriate scale and nature of development. Designated centres should remain the expected focus for retail, leisure and other main town centre uses. The continued classification of centres within the hierarchy is important in identifying which centres are relevant in the search for sequential sites.
- 6.43 The continued identification of town and local centre boundaries and primary shopping areas (PSA) in town centres are important when applying the sequential approach, to direct retail and other town centre uses to sustainable locations and determine whether a retail impact assessment is required. The NPPF continues to indicate that the first preference for retail and other town centre uses should be the PSA for retail uses and the town centre boundary for other town centre uses. However, in some circumstance where a centre is small, the town centre and PSA may cover the same area.
- 6.44 The first preference for leisure and other non-retail main town centre uses is normally the wider defined town centre area, which usually includes the PSA and other parts of the town centre. The ability to focus new retail uses within the PSA, rather than the wider town centre area, has become more difficult with the introduction of the new Class E, which allows free movement to and from retail use and other town centre uses.
- 6.45 The area of search for sequential sites i.e. relevant centres will depend on the scale, nature and location of the proposed town centre uses and the catchment area they are likely to serve, should be considered on a case-by-case basis. Some proposed main town centre uses may have market and locational requirements that cannot be met within designated

centres. Where this requirement is suggested, robust justification must be provided by the applicant.

6.46 The relatively low retail floorspace capacity projections and the high number of vacant units in centres suggest there is no need to extend centre boundaries to accommodate future growth. However, the floorspace projections suggest a small long-term under-supply of floorspace, that implies the contraction of most centre boundaries is unnecessary. The expansion or contraction of centre boundaries should be considered on a centre by centre basis, as outlined below.

6.47 The contraction of centre boundaries could be appropriate where there is a concentration of non-town centre uses on the periphery of centres e.g. residential gaps in frontages or a concentration of vacant shop units.

Nelson

6.48 The current town centre boundary for Nelson is relatively widely draw. It includes the community hospital, fire station, police station, library and town centre car parks. Some residential streets on the periphery of the centre could be excluded from the centre boundary, as follow:

- Every Street - numbers 62 to 94 (even) and 43 to 77 (odd);
- Raglan Street - numbers 1 to 13 (odd);
- Cross Street - numbers 1 to 13 (odd) and 2 to 12(even);
- Oak Street - numbers 1 to 23 (odd and even); and
- Bradley Road - numbers 8 to 22(even).

6.49 The current PSA includes Pendle Rise Shopping Centre and the main shopping spine running along Manchester Road and Scotland Road. This area includes the designated primary and secondary shopping frontages.

6.50 The PSA includes about 45% of all the retail and service units in the town centre. Within the PSA around 43% of units are occupied by convenience or comparison retail outlets, compared with the centre average of 38.5%. The unit vacancy rate within the PSA is 23.2% compared with the centre average of 29.4%.

6.51 No contraction or expansion of the designated PSA is considered necessary, although a more flexible approach may be required to tackle the relatively high shop vacancy rate.

Colne

6.52 The current town centre boundary for Colne is tightly draw around the retail/commercial area. The town centre boundary includes the main shopping spine running along Albert Road, Church Street and Market Street. There is one significant break in the commercial frontages that could be excluded from the town centre boundary i.e. Albert Road numbers 67 to 89 (odd).

6.53 There is no separate PSA in Colne, but if a future PSA included the designated primary and secondary shopping frontages, as in Nelson, then the PSA would be only marginally smaller than the town centre boundary. If a PSA is proposed in Colne, then it could cover a more tightly drawn area and could exclude all uses on the north side of Albert Road west of Linden Road and all uses on the south side of Albert Road west of Great George Street.

6.54 The areas covered by the primary and secondary frontages include over 60% of all the retail and service units in the town centre and 46% of these units are occupied by convenience or comparison retail outlets, compared with the centre average of 37.3%. The unit vacancy rate within the designated frontages is only 3.3% compared with the centre average of 9.2%.

6.55 Some contraction of the town centre boundary could be considered. A tightly drawn PSA should also be considered, where a focus of retail uses will be retained.

Barnoldswick

6.56 The current town centre boundary for Barnoldswick is reasonably tightly drawn around the retail/commercial area. There is no separate PSA. In the future, if a PSA is proposed in Barnoldswick then it is likely to cover the existing primary and secondary frontages. Some residential streets on the periphery of the centre could be excluded from the centre boundary, as follow:

- Market Street - numbers 1 to 13 (odd and even);
- Orchard Street – numbers 2 to 7 (odd and even);
- Garden Street - numbers 2 to 8 (odd and even); and
- Church Street – numbers 18 to 28 (even).

6.57 The areas covered by the primary and secondary frontages include nearly 84% of all the retail and service units in the town centre and nearly 43% of these units are occupied by convenience or comparison retail outlets, compared with the centre average of 38.8%. The unit vacancy rate within the designated frontages is 10.2% compared with the centre average of 11.6%.

6.58 No contraction or expansion of the town centre boundary is considered necessary, but a tightly drawn PSA should be considered, where a focus of retail uses will be retained.

Brierfield

6.59 The current local shopping centre boundary for Brierfield is tightly drawn around the retail/commercial area. The areas covered by the primary and secondary frontages include nearly two thirds of all the retail and service units in the local shopping centre and 33% of these units are occupied by convenience or comparison retail outlets, compared with the centre average of 31%. The unit vacancy rate within the designated frontages is 20% compared with the centre average of 18.8%.

6.60 No contraction or expansion of the local shopping centre boundary is considered necessary, although a more flexible approach may be required to tackle the relatively high shop vacancy rate.

Barrowford

6.61 The current local shopping centre boundary for Barrowford is relatively tightly drawn around the retail/commercial area. Some residential units create gaps in the commercial frontages, which could be excluded from the centre boundary, as follow:

- Gisburn Road - numbers 125 to 135 (odd);
- Butterfield Street – numbers 8 to 12 (even); and
- Harry Street – numbers 20 to 30 (even).

- 6.62 The areas covered by the primary and secondary frontages include nearly 59% of all the retail and service units in the local shopping centre and 37% of these units are occupied by convenience or comparison retail outlets, compared with the centre average of 33%. The unit vacancy rate within the designated frontages is only 3.3%. A focus of retail uses should be maintained across the centre.

Earby

- 6.63 The current local shopping centre boundary for Earby is widely drawn. Commercial units to the north of the centre are fragmented. The centre boundary could be contracted to only include the primary and secondary frontages, i.e. excluding the area to the north and east of New Cut. The remaining area covered by the primary and secondary frontages includes over 80% of all the retail and service units in the local shopping centre and 60% of these units are occupied by convenience or comparison retail outlets. The unit vacancy rate within the designated frontages is 12% compared with the centre average of 19.5%.
- 6.64 In addition to the possible contraction of the centre boundary, a more flexible approach may be required to tackle the relatively high shop vacancy rate.

Controlling the mix of uses

- 6.65 The ability to control the mix of uses within centres and frontages has changed significantly since the Local Plan was adopted. Current and future market trends; the relatively low retail floorspace short term capacity projections; and changes to the NPPF and the UCO; indicate a more flexible approach to shop frontage policies and the mix of uses within centres should be considered.
- 6.66 A balanced approach that recognises the need to maintain and enhance each centre's retail role, as well as introducing new non-retail uses including activities in the early evening and night-time economy. However, there is still a need to retain and encourage new retail uses previously categorised as Class A1 uses within the town and local shopping centres. However, changes to the Use Classes Order (UCO) and Permitted Development Rights (PDR) will restrict the future policy approach.
- 6.67 Considering changes to the UCO and PDR, restrictive policies may be unsound and unimplementable for existing premises. The UCO/PDR changes prevent a more restrictive approach. However, the introduction of Article 4 directions can be considered e.g. to remove permitted changes of use from Class E to residential (Class MA). However, Article 4 directions cannot prevent movement within the same use class i.e., new Class E.
- 6.68 In some circumstances the introduction of restrictive shop frontage policies or Article 4 directions could be inappropriate e.g. in areas with a high level of vacancies and where an increase in vacant units could harm the vitality and viability of the centre. Demand from retail occupiers has reduced and the updated retail floorspace projections are much lower than previous projections, particularly comparison goods retail. The continuation of the previous policy approaches could be undermined and hampered by the UCO/PDR changes.
- 6.69 Non-Class E uses including pubs, bars, hot food takeaways and other Sui Generis uses can be assessed against criteria-based policies e.g. relating to breaks in active frontages, amenity issues (noise/smells), impact on the nature and character of the retail frontages. Betting shops and hot food takeaways are Sui Generis uses that can still be controlled by policy, and this not affected by changes to the Use Classes Order or Permitted Development Rights Other non-Class E uses at ground floor level can be controlled within the designated frontages.

- 6.70 Notwithstanding the reduced controls, the mix of uses within Use Class E can still be controlled via planning conditions or legal agreements, where planning permission is required i.e., where there is a change of use requiring planning permission, redevelopment or new development is proposed, in the same way planning conditions/legal agreements were previously used to control movement usually permitted within the former Class A uses. This approach could be used to control the mix of ground floor uses on development site allocations. Planning policy could seek to control the mix of uses within Class E for new development where planning conditions can be introduced restricting movement within the use class.
- 6.71 The Local Plan could designate PSA's within the three main town centres to manage the mix of uses and protect the vitality and viability of the centre. The continued designation of primary and secondary frontages, in addition to a PSA, is probably unnecessary due to the changes to the UCO.
- 6.72 Within PSA's the retail offer could still be protected and uses within Class E could be retained whilst maintaining an active frontage. Within other parts of the town centres, a wider range of main town centre uses including Class E, Sui Generis and Class F could be protected.

7.0 Conclusions and recommendations

7.1 This section draws together the analysis set out in previous sections and provides strategic recommendations for Pendle Borough. It explores how the identified growth and change across the Borough could be accommodated and the future role of the town centres.

Meeting the Borough’s needs

7.2 When planning for growth in their town centres, local planning authorities should allocate a range of suitable sites to meet the scale and type of retail development needed. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability. The combined floorspace projections for retail, food/beverage and commercial leisure/ entertainment/cultural floorspace in 2030, 2035 and 2040 are summarised and rounded in Table 7.1

Table 7.1 Combined retail, food/beverage, leisure and cultural floorspace requirements (sq.m gross) --cumulative

	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food/ beverage (sq.m gross)	Leisure/ cultural (sq.m gross)	Total (sq.m gross)
By 2030	-200	-400	700	700	800
By 2035	0	-200	1,000	1,000	1,800
By 2040	200	500	1,400	1,500	3,600

7.3 The combined floorspace projection to 2040 would be negative if the lower standard method population projections were adopted, but it is better to plan for higher growth and then modify the strategy later if levels of growth are lower than originally predicted.

7.4 Long term floorspace capacity forecasts beyond 10 years are susceptible to unforeseen circumstances. Growth forecasts for expenditure and turnover are particularly uncertain and need to be carefully monitored, including the continued growth in home/internet shopping. Long term projections must be treated with caution and kept under review, particularly projections beyond 2035.

7.5 The combined total projection to 2040 is 3,600 sq.m gross which is less than the current amount of vacant shop floorspace in the Borough (about 12,000 sq.m gross). Based on a reasonable reduction in shop vacancy rates, reoccupied space could in theory accommodate all the projected need to 2040. However, there is likely to be a shift from retail space to food/ beverage and leisure/cultural uses, with vacant shop premises also converting to these uses. Not all vacant units will be suitable for conversion to leisure/cultural uses, therefore new development may be required to accommodate some new uses.

7.6 Future planning policy should seek to ensure new mixed use developments are flexible. The design and configuration of buildings should allow for the merger and sub-division of units, offering maximum flexibility to respond to changing operator requirements over the plan period.

7.7 The capacity projections in this update suggest there is no pressing requirement to allocate sites for major retail or leisure development to accommodate projected growth over the plan period. The priority in the short to medium term will be the reoccupation of vacant shop units. However, the future strategy should be flexible to respond to new investment

that cannot be accommodated in vacant units. Some redevelopment, refurbishment and expansion may be required in addition to the reoccupation of vacant units, ideally within town centres to accommodate future investment opportunities.

- 7.8 Residents in Pendle have reasonable access to a range of commercial leisure and entertainment facilities within the Borough and in the surrounding areas. Facilities in Burnley and other main centres are accessible, but not all the key sectors are represented in the Borough. There may be potential to accommodate an additional 1,500 sq.m gross of commercial leisure and cultural floorspace, which could include:
- 2 or 3 additional medium sized health and fitness facilities (120 to 180 new fitness stations);
 - small scale tourist attractions/cultural facilities such as museums/galleries; and
 - a bingo facility and other new leisure innovations e.g. trampolines, indoor climbing, escape rooms, virtual sport activities.
- 7.9 The development strategy should be flexible to respond to emerging opportunities for new leisure, entertainment and tourist related facilities.

Policy review

Hierarchy of centres

- 7.10 Identifying the hierarchy of centres and the boundaries of centres in the Local Plan is important in terms of:
- 1 ensuring the vitality and viability of town and local centres is maintained and enhanced as important hubs for the community, through the application of the impact test;
 - 2 directing retail and main town centre uses to appropriate accessible and sustainable locations, through the application of the sequential approach to site selection; and
 - 3 identifying a viable role and strategy for each centre.
- 7.11 Barnoldswick, Colne and Nelson should continue to be designated as Town Centres at the top of hierarchy, which will be the main focus for retail development in Pendle serving communities within the wider borough and beyond. The network of town centres, local shopping centres and local shopping frontages should continue to be protected and enhanced to ensure appropriate accessibility to important facilities for all sections of the community and to ensure sustainable shopping patterns.
- 7.12 Barrowford, Brierfield and Earby Local Shopping Centres all play an important role as a focal point in their respective areas, but do not offer the same range and choice of facilities available within the three Town Centres. These centres should continue to be designated as Local a Shopping Centres that will provide important local access to lower order retail for their communities and surrounding hinterland.
- 7.13 Local Shopping Frontages in Pendle have limited facilities and may be under threat if shop/service closures occur in the future e.g. Manchester Road in Nelson. These frontages should continue to be protected because they help to ensure all residents have access to local facilities within walking distance.

Impact and sequential tests

- 7.14 Local Plan policy should set out the sequential and impact tests and which designated centres need to be considered. The NPPF minimum threshold of 2,500 sq.m gross is an inappropriate threshold for Pendle Borough because this scale of development would exceed the overall long-term retail/food beverage/leisure projections in all centres in the Borough. The lower retail capacity projections, relatively high vacancy rates in some centres and uncertainties about the post-Covid recovery suggest town centres are now more vulnerable to out-of-centre developments.
- 7.15 Given the overlapping nature of catchment areas in Pendle, a consistent impact threshold should be applied across the authority area. All retail and leisure developments over 400 sq.m gross (combined) proposed outside or on the edge of designated town and local centres should be required to prepare a proportionate impact assessment, including retail and leisure uses included within mixed use allocations.
- 7.16 The area of search for sequential sites i.e. relevant centres will depend on the scale, nature and location of the proposed town centre uses and the catchment area they are likely to serve, should be considered on a case-by-case basis.
- 7.17 All main town centre uses regardless of scale are required to comply with the sequential test. However, the PPG suggests some certain main town centre uses have “particular market and locational requirements that mean they may only be accommodated in specific locations”, but robust justification must be provided to satisfy the sequential test in this respect. This approach may allow local facilities to be provided in areas that may be poorly served and/or within mixed use development to provide facilities catering for the local needs of the development, without needing to consider the sequential test.

Town and local centre boundaries

- 7.18 Development plan should define clear boundaries for town and local shopping centres on the Proposals Map, which is important when applying the sequential approach, to direct retail and other town centre uses to sustainable locations and determine whether a retail impact assessment is required.
- 7.19 The retail floorspace capacity projections and the high number of vacant units in centres suggest there is no need to significantly extend or contract centre boundaries to accommodate future growth. The minor contraction of some centre boundaries could be considered where there is a concentration of non-town centre uses or vacant shop units.
- 7.20 The following boundary adjustments could be considered:
- **Nelson** - residential streets on the periphery of the centre could be excluded from the centre boundary, i.e. Every Street, Cross Street, Raglan Street, Cross Street, Oak Street and Bradley Road.
 - **Colne** – the break in the commercial frontages on Albert Road could be excluded from the town centre boundary but a new PSA could be designated including the existing primary and secondary frontages with the exception of all uses on the north side of Albert Road west of Linden Road and all uses on the south side of Albert Road west of Great George Street.
 - **Barnoldswick** - residential streets on the periphery of the centre could be excluded from the centre boundary. A new PSA should cover the existing primary and secondary frontages.

- **Brierfield** - No contraction or expansion of the centre boundary is considered necessary, although a more flexible approach may be required to tackle the relatively high shop vacancy rate.
- **Barrowford** - some residential gaps in the commercial frontages could be excluded from the centre boundary.
- **Earby** - fragmented commercial units to the north of the centre could be excluded from the centre and the centre boundary contracted to only include the primary and secondary frontages and a more flexible approach may be required to tackle the relatively high shop vacancy rate.

Controlling the mix of uses

- 7.21 A balanced approach that recognises the need to maintain and enhance each centre's retail role, as well as introducing new non-retail uses. There is still a need to retain and encourage new retail uses within the town and local shopping centres, but changes to the Use Classes Order (UCO) and Permitted Development Rights (PDR) will restrict the future policy approach.
- 7.22 Non-Class E uses including pubs, bars, hot food takeaways and other Sui Generis uses can be assessed against criteria-based policies e.g. relating to breaks in active frontages, amenity issues (noise/smells), impact on the nature and character of the retail frontages. Betting shops and hot food takeaways are Sui Generis uses that can still be controlled by policy, and this not affected by changes to the Use Classes Order or Permitted Development Rights Other non-Class E uses at ground floor level can be controlled within the designated frontages.
- 7.23 The mix of uses within Use Class E can still be controlled via planning conditions or legal agreements, where planning permission is required. Planning policy could seek to control the mix of uses within Class E for new development where planning conditions can be introduced restricting movement within the use class.
- 7.24 The Local Plan could designate PSA's within the three main town centres to manage the mix of uses and protect the vitality and viability of the centre. The continued designation of primary and secondary frontages, in addition to a PSA, is unnecessary due to the changes to the UCO.
- 7.25 Within PSA's the retail offer could still be protected and uses within Class E could be retained whilst maintaining an active frontage. Within other parts of the town centres, a wider range of main town centre uses including Class E, Sui Generis and Class F could be protected.

Future monitoring

- 7.26 The recommendations and projections within this study will assist the Council in reviewing development plan policies over the coming years and to assist future development management decisions. The study provides an overview of the potential need for further retail and leisure development in the medium term to 2035. Longer-term projections up to 2040 are subject to uncertainty and forecasts will need to be amended to reflect emerging changes, as and when new information becomes available. These uncertainties include the longer-term implications of the Covid-19 and cost of living crisis that will need to be monitored. Longer-term projections after 2035 should be treated with caution and provide

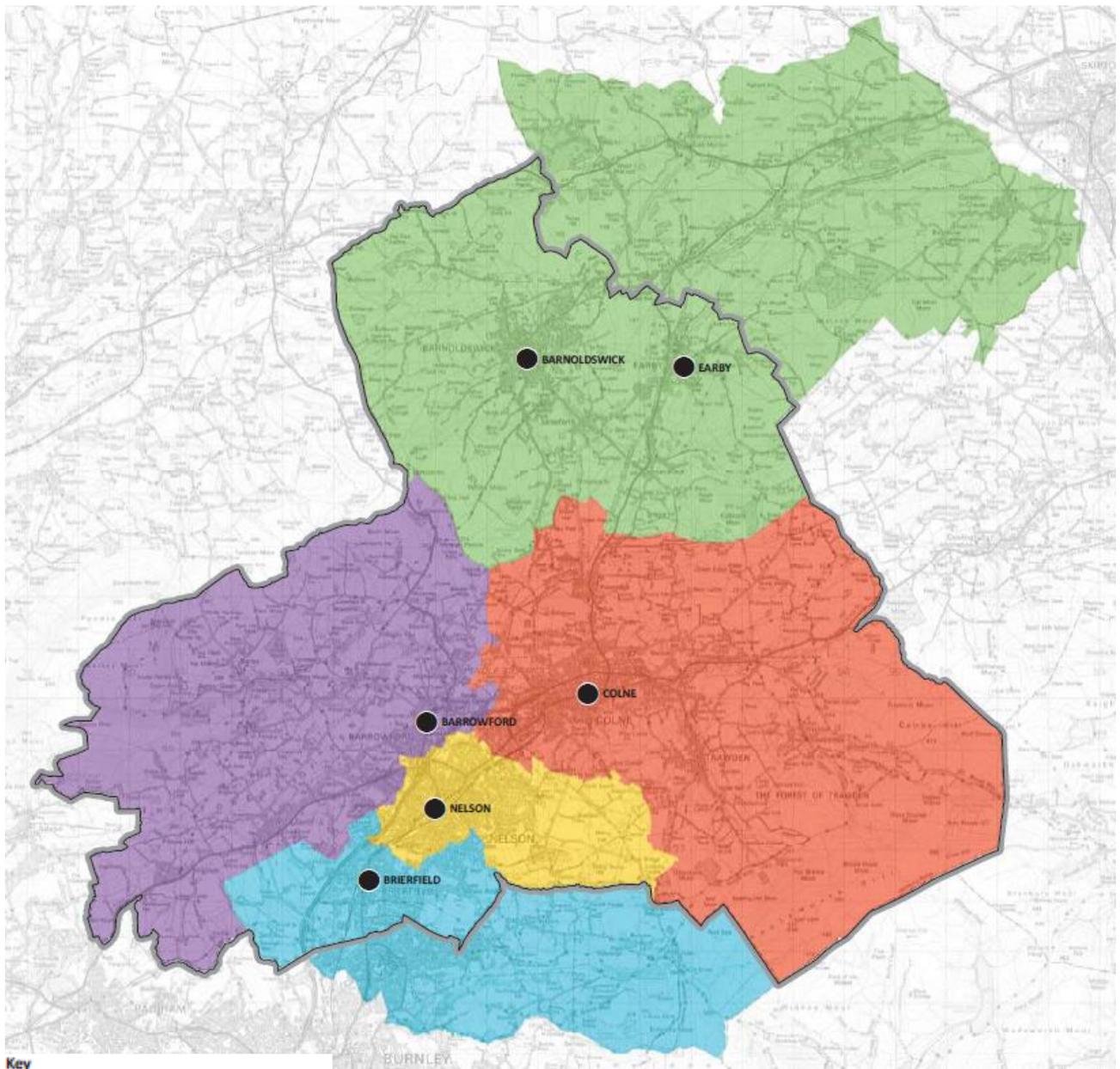
broad guidance only. Projections should be monitored and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:

- population projections;
- local expenditure estimates (information from Experian or other recognised providers);
- growth rate assumptions for expenditure per capita (information from Experian or other recognised data providers);
- the impact of potential increases in home and internet shopping (Experian regularly provides projections for internet shopping and these projections will need to be updated at the same time as expenditure and population figures);
- existing retail floorspace and average turnover to floorspace densities; and
- implemented development within and around the study area.

7.27

These key inputs into the retail/leisure capacity assessment can be amended to provide revised capacity projections.

Appendix 1 Study area and methodology



Key

 Pendle Local Authority Boundary

Zones

-  Zone 1
-  Zone 2
-  Zone 3
-  Zone 4
-  Zone 5

Existing Centres

 Town Centre

Retail Capacity Assessment – Methodology and Data

Price Base

All monetary values expressed in this study are at 2020 prices, consistent with Experian's base year expenditure figures for 2020 (Retail Planner Briefing Note 19, January 2022) which is the most up to date information available.

Retail Expenditure

The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for the year 2020 have been obtained.

Experian's EBS national expenditure information (Experian Retail Planner Briefing Note 19) has been used to forecast expenditure within the study area. Experian's forecasts are based on an econometric model of disaggregated consumer spending. This model takes a number of macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of consumer spending volumes, prices and value, broken down into separate categories of goods. The model incorporates assumptions about income and price elasticities.

Experian's EBS growth forecast rates for 2021, 2022 and 2023 reflect the current economic circumstances and provide an appropriate growth rate for the short term (for convenience goods: -0.2% for 2021, +0.7% for 2022 and +1.8% for 2023; for comparison goods: +1.9% for 2021, +2.1% for 2022 and +2.8% for 2023).

Experian's longer term growth average forecasts have been adopted i.e. +0.1% per annum for convenience goods after 2023 and 2.8% per annum growth for comparison goods. These growth rates are relatively cautious when compared with past growth rates, but in our view represent realistic forecast for future growth. These growth figures relate to real growth and exclude inflation.

Special Forms of Trading (SFT) or non-store activity is included within Experian's Goods Based Expenditure (GBE) estimates. SFT includes other forms of retail expenditure not spent in shops e.g. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling. SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship with the demand for retail floorspace. The growth in home computing, internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. Experian provides projections for special forms of trading and e-tailing. This Experian information suggests that non-store sales in 2020 was:

- 18.0% of convenience goods expenditure; and
- 34.1% of comparison goods expenditure.

Experian predicts that these figures will increase in the future. However, Experian recognises that not all non-store expenditure should be excluded from a retail capacity analysis, because some of it relates to internet sales through traditional retail businesses, rather than internet companies. The turnover attributable to e-tail through retail businesses is included in the company average turnovers, and therefore expenditure figures should not exclude this expenditure. Experian has provided adjusted deductions for SFT and projections. These projections have been used to exclude only e-tail expenditure

attributed to non-retail businesses, which will not directly impact on the demand for retail floorspace. The adjusted figures suggest that SFT sales in 2013 are:

- 5.4% of convenience goods expenditure; and
- 25.6% of comparison goods expenditure.

The projections provided by Experian suggest SFT could increase to 7.0% and 28.0% by 2029 respectively, and estimated at 7.7% and 30.1% by 2040. These figures have been adopted in this assessment.

Market Shares/Penetration Rates

To assess the capacity for new retail floorspace, penetration rates are estimated for shopping facilities within the study area. The assessment of penetration rates are based on a range of factors but primarily information gathered through the September 2022 household survey.

Appendix 2 Convenience goods assessment

Table 1 - Study area population projections

	2022	2025	2030	2035	2040
Zone 1 - Nelson	27,732	27,929	28,104	28,289	28,693
Zone 2 - Colne	23,953	24,067	24,186	24,345	24,576
Zone 3 - Barrowford/Pendle West	10,262	10,327	10,328	10,366	10,308
Zone 4 - Brierfield/Pendle South	31,790	32,025	32,363	32,596	32,840
Zone 5 - Barnoldswick/Earby	19,450	19,539	19,678	19,764	19,851
Total	113,187	113,887	114,659	115,360	116,268

Sources: *Experian MMG 3 population projections*

Table 2 - Convenience goods expenditure per person per annum (£)

	2022	2025	2030	2035	2040
Zone 1 - Nelson	1,934	1,923	1,920	1,924	1,927
Zone 2 - Colne	2,325	2,312	2,308	2,312	2,317
Zone 3 - Barrowford/Pendle West	2,697	2,683	2,679	2,683	2,688
Zone 4 - Brierfield/Pendle South	2,157	2,145	2,142	2,146	2,150
Zone 5 - Barnoldswick/Earby	2,353	2,340	2,337	2,341	2,345

Sources:
Experian Local Expenditure 2020 (2020 prices)
Experian growth rates - Retail Planner Briefing Note 19 (January 2022)
Excludes Special Forms of Trading (SFT)

Table 3 - Total convenience goods expenditure (£m)

	2022	2025	2030	2035	2040
Zone 1 - Nelson	53.63	53.71	53.96	54.43	55.29
Zone 2 - Colne	55.69	55.64	55.82	56.29	56.94
Zone 3 - Barrowford/Pendle West	27.68	27.71	27.67	27.81	27.71
Zone 4 - Brierfield/Pendle South	68.57	68.69	69.32	69.95	70.61
Zone 5 - Barnoldswick/Earby	45.77	45.72	45.99	46.27	46.55
Total	251.34	251.47	252.76	254.74	257.10

Source: *Tables 1 and 2*

Table 4 - Base year 2022 convenience goods market shares by zone (%)

Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow
Zone 1 - Nelson	60.1%	2.6%	29.8%	19.5%	2.1%	10.0%
Zone 2 - Colne	28.7%	92.5%	29.2%	14.4%	20.6%	10.0%
Zone 3 - Barrowford	0.6%	1.0%	19.1%	1.0%	0.0%	5.0%
Zone 4 - Brierfield	0.0%	0.0%	1.3%	3.4%	0.1%	5.0%
Zone 5 - Barnoldswick	0.5%	1.0%	2.7%	0.0%	48.1%	5.0%
Zone 5 - Earby	0.0%	0.0%	0.0%	0.0%	7.3%	5.0%
Pendle sub-total	89.9%	97.1%	82.1%	38.3%	78.2%	
Burnley	7.4%	1.6%	13.4%	60.0%	4.5%	
Blackburn	0.0%	0.0%	0.3%	0.3%	0.0%	
Clitheroe	0.0%	0.1%	0.9%	0.4%	0.0%	
Keighley	0.0%	0.0%	0.0%	0.0%	0.5%	
Skipton	0.0%	1.2%	0.4%	0.0%	15.7%	
Other	2.7%	0.0%	2.9%	1.0%	1.1%	
Other sub-total	10.1%	2.9%	17.9%	61.7%	21.8%	
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	

Source: NEMS Household Survey September 2022 and Lichfields' analysis.

Table 5 - Base year 2022 convenience goods expenditure patterns by zone (£M)

Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow	Total
Expenditure 2022	53.63	55.69	27.68	68.57	45.77		251.34
Zone 1 - Nelson	32.23	1.45	8.25	13.37	0.96	6.25	62.51
Zone 2 - Colne	15.39	51.51	8.08	9.87	9.43	10.48	104.77
Zone 3 - Barrowford	0.32	0.56	5.29	0.69	0.00	0.36	7.21
Zone 4 - Brierfield	0.00	0.00	0.36	2.33	0.05	0.14	2.88
Zone 5 - Barnoldswick	0.27	0.56	0.75	0.00	22.01	1.24	24.83
Zone 5 - Earby	0.00	0.00	0.00	0.00	3.34	0.18	3.52
Pendle sub-total	48.22	54.08	22.72	26.26	35.79	18.65	205.72
Burnley	3.97	0.89	3.71	41.14	2.06		51.77
Blackburn	0.00	0.00	0.08	0.21	0.00		0.29
Clitheroe	0.00	0.06	0.25	0.27	0.00		0.58
Keighley	0.00	0.00	0.00	0.00	0.23		0.23
Skipton	0.00	0.67	0.11	0.00	7.19		7.96
Other	1.45	0.00	0.80	0.69	0.50		3.44
Other sub-total	5.42	1.62	4.95	42.31	9.98		64.27
TOTAL	53.63	55.69	27.68	68.57	45.77		269.99

Source: Tables 3 and 4

Table 6 - Future 2025 convenience goods expenditure patterns by zone (£M)

Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow	Total
Expenditure 2025	53.71	55.64	27.71	68.69	45.72		251.47
Zone 1 - Nelson	32.28	1.45	8.26	13.40	0.96	6.26	62.60
Zone 2 - Colne	15.41	51.47	8.09	9.89	9.42	10.48	104.76
Zone 3 - Barrowford	0.32	0.56	5.29	0.69	0.00	0.36	7.22
Zone 4 - Brierfield	0.00	0.00	0.36	2.34	0.05	0.14	2.89
Zone 5 - Barnoldswick	0.27	0.56	0.75	0.00	21.99	1.24	24.81
Zone 5 - Earby	0.00	0.00	0.00	0.00	3.34	0.18	3.51
Pendle sub-total	48.28	54.03	22.75	26.31	35.75	18.66	205.78
Burnley	3.97	0.89	3.71	41.22	2.06		51.85
Blackburn	0.00	0.00	0.08	0.21	0.00		0.29
Clitheroe	0.00	0.06	0.25	0.27	0.00		0.58
Keighley	0.00	0.00	0.00	0.00	0.23		0.23
Skipton	0.00	0.67	0.11	0.00	7.18		7.96
Other	1.45	0.00	0.80	0.69	0.50		3.44
Other sub-total	5.42	1.61	4.96	42.38	9.97		64.35
TOTAL	53.71	55.64	27.71	68.69	45.72		270.13

Source: Tables 3 and 4

Table 7 - Future 2030 convenience goods expenditure patterns by zone (£M)

Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow	Total
Expenditure 2030	53.96	55.82	27.67	69.32	45.99		252.76
Zone 1 - Nelson	32.43	1.45	8.25	13.52	0.97	6.29	62.90
Zone 2 - Colne	15.49	51.63	8.08	9.98	9.47	10.52	105.17
Zone 3 - Barrowford	0.32	0.56	5.28	0.69	0.00	0.36	7.22
Zone 4 - Brierfield	0.00	0.00	0.36	2.36	0.05	0.15	2.91
Zone 5 - Barnoldswick	0.27	0.56	0.75	0.00	22.12	1.25	24.94
Zone 5 - Earby	0.00	0.00	0.00	0.00	3.36	0.18	3.53
Pendle sub-total	48.51	54.20	22.72	26.55	35.96	18.74	206.68
Burnley	3.99	0.89	3.71	41.59	2.07		52.26
Blackburn	0.00	0.00	0.08	0.21	0.00		0.29
Clitheroe	0.00	0.06	0.25	0.28	0.00		0.58
Keighley	0.00	0.00	0.00	0.00	0.23		0.23
Skipton	0.00	0.67	0.11	0.00	7.22		8.00
Other	1.46	0.00	0.80	0.69	0.51		3.46
Other sub-total	5.45	1.62	4.95	42.77	10.03		64.82
TOTAL	53.96	55.82	27.67	69.32	45.99		271.50

Source: Tables 3 and 4

Table 8 - Future 2035 convenience goods expenditure patterns by zone (£M)

Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow	Total
Expenditure 2035	54.43	56.29	27.81	69.95	46.27		254.74
Zone 1 - Nelson	32.71	1.46	8.29	13.64	0.97	6.34	63.42
Zone 2 - Colne	15.62	52.06	8.12	10.07	9.53	10.60	106.01
Zone 3 - Barrowford	0.33	0.56	5.31	0.70	0.00	0.36	7.26
Zone 4 - Brierfield	0.00	0.00	0.36	2.38	0.05	0.15	2.93
Zone 5 - Barnoldswick	0.27	0.56	0.75	0.00	22.25	1.25	25.10
Zone 5 - Earby	0.00	0.00	0.00	0.00	3.38	0.18	3.56
Pendle sub-total	48.93	54.65	22.83	26.79	36.18	18.89	208.28
Burnley	4.03	0.90	3.73	41.97	2.08		52.71
Blackburn	0.00	0.00	0.08	0.21	0.00		0.29
Clitheroe	0.00	0.06	0.25	0.28	0.00		0.59
Keighley	0.00	0.00	0.00	0.00	0.23		0.23
Skipton	0.00	0.68	0.11	0.00	7.26		8.05
Other	1.47	0.00	0.81	0.70	0.51		3.48
Other sub-total	5.50	1.63	4.98	43.16	10.09		65.35
TOTAL	54.43	56.29	27.81	69.95	46.27		273.63

Source: Tables 3 and 4

Table 9 - Future 2040 convenience goods expenditure patterns by zone (£M)

Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow	Total
Expenditure 2040	55.29	56.94	27.71	70.61	46.55		257.10
Zone 1 - Nelson	33.23	1.48	8.26	13.77	0.98	6.41	64.13
Zone 2 - Colne	15.87	52.67	8.09	10.17	9.59	10.71	107.10
Zone 3 - Barrowford	0.33	0.57	5.29	0.71	0.00	0.36	7.26
Zone 4 - Brierfield	0.00	0.00	0.36	2.40	0.05	0.15	2.96
Zone 5 - Barnoldswick	0.28	0.57	0.75	0.00	22.39	1.26	25.25
Zone 5 - Earby	0.00	0.00	0.00	0.00	3.40	0.18	3.58
Pendle sub-total	49.71	55.29	22.75	27.04	36.40	19.07	210.27
Burnley	4.09	0.91	3.71	42.36	2.09		53.17
Blackburn	0.00	0.00	0.08	0.21	0.00		0.29
Clitheroe	0.00	0.06	0.25	0.28	0.00		0.59
Keighley	0.00	0.00	0.00	0.00	0.23		0.23
Skipton	0.00	0.68	0.11	0.00	7.31		8.10
Other	1.49	0.00	0.80	0.71	0.51		3.51
Other sub-total	5.58	1.65	4.96	43.56	10.15		65.91
TOTAL	55.29	56.94	27.71	70.61	46.55		276.17

Source: Tables 3 and 4

Table 10 - Convenience goods floorspace and benchmark turnover in Pendle

Location	Store	Sales floorspace (sq.m net)	Convenience goods floorspace (%)	Convenience goods floorspace (sq.m net)	Turnover (£ per sq.m)	Total turnover (£m)
Nelson	Morrison's, Pendle Street	3,729	85%	3,170	£12,944	£41.03
	Lidl, Rigby Street	910	80%	728	£8,741	£6.36
	Farmfoods, Leeds Road	338	98%	331	£5,664	£1.88
	Home Bargains, Leeds Road	1,782	30%	535	£5,921	£3.17
	Other Nelson	1,200	100%	1,200	£6,000	£7.20
	Sub Total		7,959		5,963	
Colne	Asda, Boundary Retail Park	4,474	60%	2,684	£14,248	£38.25
	Aldi, North Valley Road	919	80%	735	£11,020	£8.10
	Lidl, North Valley Road	1,589	80%	1,271	£8,741	£11.11
	Sainsbury's, Windy Bank	4,307	75%	3,230	£12,482	£40.32
	Co-op, Market Street	286	95%	272	£10,990	£2.99
	Tesco Express, Market St.	165	95%	157	£14,075	£2.21
	Farmfoods, Market Street	321	98%	315	£5,664	£1.78
	B&M Bargains, Corporation St.	1,109	30%	333	£2,979	£0.99
	Other Colne	600	100%	600	£6,000	£3.60
Sub-Total		13,770		9,597		£109.35
Barrowford	Spar, Gisburn Road	51	95%	48	£9,007	£0.44
	Booths, Halstead Lane	946	95%	899	£4,410	£3.96
	Other Barrowford	300	100%	300	£6,000	£1.80
	Sub-Total		1,297		1,247	
Brierfield	Morrisons Daily, Colne Road	186	95%	177	£12,944	£2.29
	Other Brierfield	400	100%	400	£6,000	£2.40
	Sub Total		586		577	
Barnoldswick	Aldi, Crownest Road	1,125	80%	900	£11,020	£9.92
	Co-op, Rainhall Road	603	95%	573	£10,990	£6.30
	Other Barnoldswick	600	95%	570	£6,000	£3.42
	Sub Total		2,328		2,043	
Earby	Co-op, Victoria Road	240	95%	228	£10,990	£2.51
	Other Earby	300	100%	300	£6,000	£1.80
	Sub-Total		540		528	
TOTAL		26,480		19,955		£203.81

Source: Pendle Council's Land Use Survey 2022, Valuation Office Agency and ORC StorePoint 2022 and Global Data 2022

Table 11 - Summary of convenience goods expenditure 2022 to 2040 (£M)

Destination	2022	2025	2030	2035	2040
Available expenditure					
Zone 1 - Nelson	62.51	62.60	62.90	63.42	64.13
Zone 2 - Colne	104.77	104.76	105.17	106.01	107.10
Zone 3 - Barrowford	7.21	7.22	7.22	7.26	7.26
Zone 4 - Brierfield	2.88	2.89	2.91	2.93	2.96
Zone 5 - Barnoldswick	24.83	24.81	24.94	25.10	25.25
Zone 5 - Earby	3.52	3.51	3.53	3.56	3.58
Total	205.72	205.78	206.68	208.28	210.27
Turnover of existing facilities					
Zone 1 - Nelson	59.63	60.71	60.89	60.89	60.89
Zone 2 - Colne	109.35	111.32	111.65	111.65	111.65
Zone 3 - Barrowford	6.20	6.31	6.33	6.33	6.33
Zone 4 - Brierfield	4.69	4.77	4.79	4.79	4.79
Zone 5 - Barnoldswick	19.63	19.99	20.05	20.05	20.05
Zone 5 - Earby	4.31	4.38	4.40	4.40	4.40
Total	203.81	207.48	208.10	208.10	208.10
Surplus/deficit expenditure £M					
Zone 1 - Nelson	2.88	1.89	2.01	2.53	3.24
Zone 2 - Colne	-4.58	-6.56	-6.48	-5.64	-4.55
Zone 3 - Barrowford	1.01	0.91	0.89	0.93	0.93
Zone 4 - Brierfield	-1.81	-1.89	-1.88	-1.85	-1.83
Zone 5 - Barnoldswick	5.19	4.82	4.89	5.05	5.20
Zone 5 - Earby	-0.79	-0.87	-0.86	-0.84	-0.82
Total	1.91	-1.70	-1.43	0.17	2.16

Source: Tables 5 to 10

Table 12 - Convenience goods floorspace capacity up to 2040

	2022	2025	2030	2035	2040
Turnover density new floorspace (£ per sq.m)	£12,000	£12,216	£12,253	£12,253	£12,253
Floorspace projection (sq.m net)					
Zone 1 - Nelson	240	155	164	206	264
Zone 2 - Colne	-382	-537	-529	-460	-372
Zone 3 - Barrowford	84	74	73	76	76
Zone 4 - Brierfield	-151	-154	-153	-151	-149
Zone 5 - Barnoldswick	433	394	399	412	424
Zone 5 - Earby	-66	-71	-70	-69	-67
Total	159	-139	-116	14	176
Floorspace Projection (sq.m gross)					
Zone 1 - Nelson	343	221	234	294	377
Zone 2 - Colne	-545	-767	-755	-658	-531
Zone 3 - Barrowford	120	106	104	109	109
Zone 4 - Brierfield	-215	-221	-219	-216	-213
Zone 5 - Barnoldswick	618	563	571	589	606
Zone 5 - Earby	-94	-102	-101	-98	-96
Total	228	-199	-166	20	252

Source: Table 11

Appendix 3 Comparison goods assessment

Table 1 - Study area population projections

	2022	2025	2030	2035	2040
Zone 1 - Nelson	27,732	27,929	28,104	28,289	28,693
Zone 2 - Colne	23,953	24,067	24,186	24,345	24,576
Zone 3 - Barrowford/Pendle West	10,262	10,327	10,328	10,366	10,308
Zone 4 - Brierfield/Pendle South	31,790	32,025	32,363	32,596	32,840
Zone 5 - Barnoldswick/Earby	19,450	19,539	19,678	19,764	19,851
Total	113,187	113,887	114,659	115,360	116,268

Sources:

Experian MMG 3 population projections

Table 2 - Comparison goods expenditure per person per annum (£)

	2022	2025	2030	2035	2040
Zone 1 - Nelson	2,016	2,127	2,373	2,692	3,079
Zone 2 - Colne	2,766	2,918	3,256	3,694	4,225
Zone 3 - Barrowford/Pendle West	3,621	3,820	4,264	4,837	5,532
Zone 4 - Brierfield/Pendle South	2,579	2,721	3,037	3,445	3,941
Zone 5 - Barnoldswick/Earby	2,818	2,973	3,318	3,763	4,305

Sources:

Experian Local Expenditure 2020 (2020 prices)

Experian growth rates - Retail Planner Briefing Note 19 (January 2022)

Excludes Special Forms of Trading (SFT)

Table 3 - Total comparison goods expenditure (£m)

	2022	2025	2030	2035	2040
Zone 1 - Nelson	55.91	59.40	66.69	76.15	88.35
Zone 2 - Colne	66.25	70.23	78.75	89.93	103.83
Zone 3 - Barrowford/Pendle West	37.16	39.45	44.04	50.14	57.02
Zone 4 - Brierfield/Pendle South	81.99	87.14	98.29	112.29	129.42
Zone 5 - Barnoldswick/Earby	54.81	58.09	65.29	74.37	85.46
Total	296.12	314.31	353.06	402.89	464.08

Source: Tables 1 and 2

Table 4 - Base year 2022 comparison goods market shares by zone (%)

Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow
Zone 1 - Nelson	38.0%	8.8%	14.5%	16.3%	4.7%	10.0%
Zone 2 - Colne	23.0%	63.6%	30.5%	12.7%	28.0%	10.0%
Zone 3 - Barrowford	0.3%	1.1%	11.1%	0.5%	1.4%	5.0%
Zone 4 - Brierfield	2.5%	2.4%	2.5%	2.8%	0.9%	5.0%
Zone 5 - Barnoldswick	0.0%	0.5%	0.5%	0.0%	19.6%	5.0%
Zone 5 - Earby	0.0%	0.1%	0.1%	0.0%	2.1%	5.0%
Pendle sub-total	63.8%	76.5%	59.2%	32.3%	56.7%	
Burnley	27.0%	16.4%	26.0%	55.0%	14.2%	
Blackburn	2.9%	2.0%	2.2%	4.8%	2.1%	
Clitheroe	0.0%	0.6%	1.3%	0.4%	0.2%	
Halifax	0.0%	0.0%	0.0%	0.0%	0.0%	
Keighley	0.2%	0.1%	0.1%	0.4%	1.4%	
Manchester	3.0%	0.8%	3.3%	0.9%	1.8%	
Preston	0.1%	0.0%	0.2%	1.9%	1.4%	
Skipton	0.1%	1.1%	0.5%	0.4%	14.7%	
Other	2.9%	2.5%	7.2%	3.9%	7.5%	
Other sub-total	36.2%	23.5%	40.8%	67.7%	43.3%	
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	

Source: NEMS Household Survey September 2022 and Lichfields' analysis.

Table 5 - Base year 2022 comparison goods expenditure patterns by zone (£M)

Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow	Total
Expenditure 2022	55.91	66.25	37.16	81.99	54.81		296.12
Zone 1 - Nelson	21.24	5.83	5.39	13.36	2.58	5.38	53.78
Zone 2 - Colne	12.86	42.14	11.33	10.41	15.35	10.23	102.32
Zone 3 - Barrowford	0.17	0.73	4.12	0.41	0.77	0.33	6.52
Zone 4 - Brierfield	1.40	1.59	0.93	2.30	0.49	0.35	7.06
Zone 5 - Barnoldswick	0.00	0.33	0.19	0.00	10.74	0.59	11.85
Zone 5 - Earby	0.00	0.07	0.04	0.00	1.15	0.07	1.32
Pendle sub-total	35.67	50.68	22.00	26.48	31.08	16.95	182.86
Burnley	15.10	10.87	9.66	45.09	7.78		88.50
Blackburn	1.62	1.33	0.82	3.94	1.15		8.85
Clitheroe	0.00	0.40	0.48	0.33	0.11		1.32
Halifax	0.00	0.00	0.00	0.00	0.00		0.00
Keighley	0.11	0.07	0.04	0.33	0.77		1.31
Manchester	1.68	0.53	1.23	0.74	0.99		5.16
Preston	0.06	0.00	0.07	1.56	0.77		2.46
Skipton	0.06	0.73	0.19	0.33	8.06		9.36
Other	1.62	1.66	2.68	3.20	4.11		13.26
Other sub-total	20.24	15.57	15.16	55.50	23.73		130.21
TOTAL	55.91	66.25	37.16	81.99	54.81		313.06

Source: Tables 3 and 4

Table 6 - Future 2025 comparison goods expenditure patterns by zone (£M)

Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow	Total
Expenditure 2025	59.40	70.23	39.45	87.14	58.09		314.31
Zone 1 - Nelson	22.57	6.18	5.72	14.20	2.73	5.71	57.12
Zone 2 - Colne	13.66	44.66	12.03	11.07	16.27	10.85	108.55
Zone 3 - Barrowford	0.18	0.77	4.38	0.44	0.81	0.35	6.92
Zone 4 - Brierfield	1.49	1.69	0.99	2.44	0.52	0.37	7.49
Zone 5 - Barnoldswick	0.00	0.35	0.20	0.00	11.39	0.63	12.56
Zone 5 - Earby	0.00	0.07	0.04	0.00	1.22	0.07	1.40
Pendle sub-total	37.90	53.72	23.35	28.15	32.94	17.99	194.05
Burnley	16.04	11.52	10.26	47.93	8.25		93.99
Blackburn	1.72	1.40	0.87	4.18	1.22		9.40
Clitheroe	0.00	0.42	0.51	0.35	0.12		1.40
Halifax	0.00	0.00	0.00	0.00	0.00		0.00
Keighley	0.12	0.07	0.04	0.35	0.81		1.39
Manchester	1.78	0.56	1.30	0.78	1.05		5.48
Preston	0.06	0.00	0.08	1.66	0.81		2.61
Skipton	0.06	0.77	0.20	0.35	8.54		9.92
Other	1.72	1.76	2.84	3.40	4.36		14.07
Other sub-total	21.50	16.50	16.10	58.99	25.15		138.25
TOTAL	59.40	70.23	39.45	87.14	58.09		332.30

Source: Tables 3 and 4

Table 7 - Future 2030 comparison goods expenditure patterns by zone (£M)

Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow	Total
Expenditure 2030	66.69	78.75	44.04	98.29	65.29		353.06
Zone 1 - Nelson	25.34	6.93	6.39	16.02	3.07	6.42	64.16
Zone 2 - Colne	15.34	50.08	13.43	12.48	18.28	12.18	121.80
Zone 3 - Barrowford	0.20	0.87	4.89	0.49	0.91	0.39	7.75
Zone 4 - Brierfield	1.67	1.89	1.10	2.75	0.59	0.42	8.42
Zone 5 - Barnoldswick	0.00	0.39	0.22	0.00	12.80	0.71	14.12
Zone 5 - Earby	0.00	0.08	0.04	0.00	1.37	0.08	1.57
Pendle sub-total	42.55	60.24	26.07	31.75	37.02	20.19	217.82
Burnley	18.01	12.91	11.45	54.06	9.27		105.70
Blackburn	1.93	1.57	0.97	4.72	1.37		10.57
Clitheroe	0.00	0.47	0.57	0.39	0.13		1.57
Halifax	0.00	0.00	0.00	0.00	0.00		0.00
Keighley	0.13	0.08	0.04	0.39	0.91		1.56
Manchester	2.00	0.63	1.45	0.88	1.18		6.14
Preston	0.07	0.00	0.09	1.87	0.91		2.94
Skipton	0.07	0.87	0.22	0.39	9.60		11.14
Other	1.93	1.97	3.17	3.83	4.90		15.80
Other sub-total	24.14	18.51	17.97	66.54	28.27		155.43
TOTAL	66.69	78.75	44.04	98.29	65.29		373.25

Source: Tables 3 and 4

Table 8 - Future 2035 comparison goods expenditure patterns by zone (£M)

Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow	Total
Expenditure 2035	76.15	89.93	50.14	112.29	74.37		402.89
Zone 1 - Nelson	28.94	7.91	7.27	18.30	3.50	7.32	73.25
Zone 2 - Colne	17.52	57.20	15.29	14.26	20.82	13.90	138.99
Zone 3 - Barrowford	0.23	0.99	5.57	0.56	1.04	0.44	8.83
Zone 4 - Brierfield	1.90	2.16	1.25	3.14	0.67	0.48	9.61
Zone 5 - Barnoldswick	0.00	0.45	0.25	0.00	14.58	0.80	16.08
Zone 5 - Earby	0.00	0.09	0.05	0.00	1.56	0.09	1.79
Pendle sub-total	48.59	68.80	29.68	36.27	42.17	23.04	248.54
Burnley	20.56	14.75	13.04	61.76	10.56		120.67
Blackburn	2.21	1.80	1.10	5.39	1.56		12.06
Clitheroe	0.00	0.54	0.65	0.45	0.15		1.79
Halifax	0.00	0.00	0.00	0.00	0.00		0.00
Keighley	0.15	0.09	0.05	0.45	1.04		1.78
Manchester	2.28	0.72	1.65	1.01	1.34		7.01
Preston	0.08	0.00	0.10	2.13	1.04		3.35
Skipton	0.08	0.99	0.25	0.45	10.93		12.70
Other	2.21	2.25	3.61	4.38	5.58		18.02
Other sub-total	27.57	21.13	20.46	76.02	32.20		177.38
TOTAL	76.15	89.93	50.14	112.29	74.37		425.93

Source: Tables 3 and 4

Table 9 - Future 2040 comparison goods expenditure patterns by zone (£M)

Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow	Total
Expenditure 2040	88.35	103.83	57.02	129.42	85.46		464.08
Zone 1 - Nelson	33.57	9.14	8.27	21.10	4.02	8.45	84.54
Zone 2 - Colne	20.32	66.04	17.39	16.44	23.93	16.01	160.13
Zone 3 - Barrowford	0.27	1.14	6.33	0.65	1.20	0.50	10.08
Zone 4 - Brierfield	2.21	2.49	1.43	3.62	0.77	0.55	11.07
Zone 5 - Barnoldswick	0.00	0.52	0.29	0.00	16.75	0.92	18.48
Zone 5 - Earby	0.00	0.10	0.06	0.00	1.79	0.10	2.06
Pendle sub-total	56.36	79.43	33.76	41.80	48.46	26.55	286.37
Burnley	23.85	17.03	14.83	71.18	12.14		139.03
Blackburn	2.56	2.08	1.25	6.21	1.79		13.90
Clitheroe	0.00	0.62	0.74	0.52	0.17		2.05
Halifax	0.00	0.00	0.00	0.00	0.00		0.00
Keighley	0.18	0.10	0.06	0.52	1.20		2.05
Manchester	2.65	0.83	1.88	1.16	1.54		8.07
Preston	0.09	0.00	0.11	2.46	1.20		3.86
Skipton	0.09	1.14	0.29	0.52	12.56		14.60
Other	2.56	2.60	4.11	5.05	6.41		20.72
Other sub-total	31.98	24.40	23.27	87.62	37.00		204.27
TOTAL	88.35	103.83	57.02	129.42	85.46		490.64

Source: Tables 3 and 4

Table 10 - Comparison goods floorspace in Pendle's deisgnated centres and retail parks

Location	Gross floorspace (sq.m)	Sales floorspace (sq.m net)
Nelson		
Nelson town centre	15,631	10,160
Nelson food stores	n/a	1,996
Pendle Village Mill	13,325	5,703
	28,956	17,859
Colne		
Colne town centre	5,819	3,782
Colne food stores	n/a	4,173
Boundary Outlet Mill	24,717	19,376
Boundary Retail Park (Next/DFS)	1,868	1,494
Swinden Retail Park (Poundland/Pets at Home)	1,426	1,089
North Valley Retail Park (Matalan/TK Maxx/Poundstetcher)	4,500	3,600
	38,330	33,515
Barrowford		
Barrowford town centre	2,634	1,712
Barrowford food stores	n/a	50
	2,634	1,762
Brierfield		
Brierfield town centre	2,415	1,570
Brierfield food stores	n/a	9
	2,415	1,579
Barnoldswick		
Barnoldswick town centre	2,268	1,474
Barnoldswick food stores	n/a	285
	2,268	1,759
Earby		
Earby town centre	923	600
Earby food stores	n/a	12
	923	612
TOTAL	75,526	57,086

Source: Pendle Council Land Use Survey 2022 and VOA

Table 11 - Summary of comparison goods expenditure 2022 to 2040 (£M)

Destination	2022	2025	2030	2035	2040
Available expenditure					
Zone 1 - Nelson	53.78	57.12	64.16	73.25	84.54
Zone 2 - Colne	102.32	108.55	121.80	138.99	160.13
Zone 3 - Barrowford	6.52	6.92	7.75	8.83	10.08
Zone 4 - Brierfield	7.06	7.49	8.42	9.61	11.07
Zone 5 - Barnoldswick	11.85	12.56	14.12	16.08	18.48
Zone 5 - Earby	1.32	1.40	1.57	1.79	2.06
Total	182.86	194.05	217.82	248.54	286.37
Turnover of existing facilities					
Zone 1 - Nelson	53.78	57.47	64.57	73.42	83.47
Zone 2 - Colne	102.32	109.33	122.85	139.68	158.80
Zone 3 - Barrowford	6.52	6.97	7.83	8.91	10.13
Zone 4 - Brierfield	7.06	7.54	8.48	9.64	10.96
Zone 5 - Barnoldswick	11.85	12.66	14.23	16.18	18.40
Zone 5 - Earby	1.32	1.41	1.59	1.80	2.05
Total	182.86	195.39	219.55	249.62	283.80
Surplus/deficit expenditure £M					
Zone 1 - Nelson	0.00	-0.35	-0.41	-0.17	1.07
Zone 2 - Colne	0.00	-0.78	-1.05	-0.69	1.32
Zone 3 - Barrowford	0.00	-0.05	-0.09	-0.08	-0.04
Zone 4 - Brierfield	0.00	-0.05	-0.06	-0.03	0.12
Zone 5 - Barnoldswick	0.00	-0.10	-0.11	-0.10	0.08
Zone 5 - Earby	0.00	-0.01	-0.01	-0.01	0.01
Total	0.00	-1.34	-1.73	-1.07	2.57

Source: Tables 5 to 10

Table 12 - Comparison goods floorspace capacity up to 2040

	2022	2025	2030	2035	2040
Turnover density new floorspace (£ per sq.m)	£5,000	£5,343	£6,003	£6,825	£7,760
Floorspace projection (sq.m net)					
Zone 1 - Nelson	0	-65	-68	-25	138
Zone 2 - Colne	0	-147	-176	-101	171
Zone 3 - Barrowford	0	-9	-14	-12	-5
Zone 4 - Brierfield	0	-9	-9	-4	15
Zone 5 - Barnoldswick	0	-19	-19	-14	11
Zone 5 - Earby	0	-2	-2	-2	1
Total	0	-251	-289	-157	331
Floorspace Projection (sq.m gross)					
Zone 1 - Nelson	0	-92	-98	-36	198
Zone 2 - Colne	0	-210	-251	-144	244
Zone 3 - Barrowford	0	-13	-21	-17	-8
Zone 4 - Brierfield	0	-13	-13	-5	22
Zone 5 - Barnoldswick	0	-27	-27	-21	15
Zone 5 - Earby	0	-3	-3	-2	2
Total	0	-358	-413	-225	472

Source: Table 11

Appendix 4 Food/beverage assessment

Table 1 - Study area population projections

	2022	2025	2030	2035	2040
Zone 1 - Nelson	27,732	27,929	28,104	28,289	28,693
Zone 2 - Colne	23,953	24,067	24,186	24,345	24,576
Zone 3 - Barrowford/Pendle West	10,262	10,327	10,328	10,366	10,308
Zone 4 - Brierfield/Pendle South	31,790	32,025	32,363	32,596	32,840
Zone 5 - Barnoldswick/Earby	19,450	19,539	19,678	19,764	19,851
Total	113,187	113,887	114,659	115,360	116,268

Sources:

Experian MMG 3 population projections

Table 2 - Food/beverage expenditure per person per annum (£)

	2022	2025	2030	2035	2040
Zone 1 - Nelson	903	932	981	1,026	1,073
Zone 2 - Colne	1,265	1,306	1,374	1,436	1,502
Zone 3 - Barrowford/Pendle West	1,740	1,796	1,889	1,976	2,067
Zone 4 - Brierfield/Pendle South	1,210	1,249	1,314	1,375	1,438
Zone 5 - Barnoldswick/Earby	1,302	1,345	1,415	1,479	1,547

Sources:

Experian Local Expenditure 2020 (2020 prices)

Experian growth rates - Retail Planner Briefing Note 19 (January 2022)

Table 3 - Total food/beverage expenditure (£m)

	2022	2025	2030	2035	2040
Zone 1 - Nelson	25.04	26.03	27.57	29.02	30.79
Zone 2 - Colne	30.30	31.43	33.23	34.96	36.91
Zone 3 - Barrowford/Pendle West	17.86	18.55	19.51	20.48	21.31
Zone 4 - Brierfield/Pendle South	38.47	40.00	42.52	44.82	47.22
Zone 5 - Barnoldswick/Earby	25.32	26.28	27.84	29.23	30.71
Total	136.99	142.29	150.68	158.52	166.94

Source: Tables 1 and 2

Table 4 - Base year 2022 food/beverage market shares by zone (%)

Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow
Zone 1 - Nelson	13.1%	3.6%	2.4%	2.0%	2.5%	10.0%
Zone 2 - Colne	20.8%	54.8%	6.4%	9.4%	9.1%	10.0%
Zone 2 - Other	0.3%	10.5%	0.8%	1.1%	0.0%	5.0%
Zone 3 - Barrowford	6.5%	3.1%	30.3%	1.9%	1.8%	5.0%
Zone 3 - Other	2.5%	0.4%	32.6%	3.6%	0.0%	5.0%
Zone 4 - Brierfield	0.0%	0.0%	0.0%	2.9%	0.0%	5.0%
Zone 4 - Other	0.3%	0.7%	0.0%	0.6%	2.7%	5.0%
Zone 5 - Barnoldswick	1.4%	3.1%	0.0%	0.0%	24.3%	5.0%
Zone 5 - Earby	0.3%	2.0%	2.6%	0.0%	12.1%	5.0%
Zone 5 - Other	0.6%	4.9%	1.8%	3.2%	7.2%	5.0%
Pendle sub- total	45.8%	83.1%	76.9%	24.7%	59.7%	
Burnley	13.1%	3.9%	3.1%	36.7%	0.8%	
Blackburn	14.0%	0.0%	0.0%	10.2%	0.0%	
Clitheroe	1.0%	0.0%	7.0%	0.6%	1.0%	
Keighley	0.0%	0.0%	0.0%	0.0%	1.7%	
Manchester	17.6%	0.3%	3.2%	6.8%	6.8%	
Preston	0.0%	0.0%	0.0%	0.6%	2.4%	
Skipton	0.3%	2.3%	0.0%	2.2%	10.7%	
Other	8.2%	10.4%	9.8%	18.2%	16.9%	
Other sub- total	54.2%	16.9%	23.1%	75.3%	40.3%	
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	

Source: NEMS Household Survey Septmeber 2022 and Lichfields' analysis.

Table 5 - Base year 2022 food/beverage expenditure patterns by zone (£M)

Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow	Total
Expenditure 2022	25.04	30.30	17.86	38.47	25.32		136.99
Zone 1 - Nelson	3.28	1.09	0.43	0.77	0.63	0.69	6.89
Zone 2 - Colne	5.21	16.60	1.14	3.62	2.30	3.21	32.08
Zone 2 - Other	0.08	3.18	0.14	0.42	0.00	0.20	4.02
Zone 3 - Barrowford	1.63	0.94	5.41	0.73	0.46	0.48	9.65
Zone 3 - Other	0.63	0.12	5.82	1.38	0.00	0.42	8.37
Zone 4 - Brierfield	0.00	0.00	0.00	1.12	0.00	0.06	1.17
Zone 4 - Other	0.08	0.21	0.00	0.23	0.68	0.06	1.27
Zone 5 - Barnoldswick	0.35	0.94	0.00	0.00	6.15	0.39	7.84
Zone 5 - Earby	0.08	0.61	0.46	0.00	3.06	0.22	4.43
Zone 5 - Other	0.15	1.48	0.32	1.23	1.82	0.26	5.27
Pendle sub-total	11.47	25.18	13.73	9.50	15.12	6.00	81.00
Burnley	3.28	1.18	0.55	14.12	0.20		19.34
Blackburn	3.51	0.00	0.00	3.92	0.00		7.43
Clitheroe	0.25	0.00	1.25	0.23	0.25		1.98
Keighley	0.00	0.00	0.00	0.00	0.43		0.43
Manchester	4.41	0.09	0.57	2.62	1.72		9.41
Preston	0.00	0.00	0.00	0.23	0.61		0.84
Skipton	0.08	0.70	0.00	0.85	2.71		4.33
Other	2.05	3.15	1.75	7.00	4.28		18.24
Other sub-total	13.57	5.12	4.12	28.96	10.21		61.99
TOTAL	25.04	30.30	17.86	38.47	25.32		142.99

Source: Tables 3 and 4

Table 6 - Future 2025 food/beverage expenditure patterns by zone (£M)

Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow	Total
Expenditure 2025	26.03	31.43	18.55	40.00	26.28		142.29
Zone 1 - Nelson	3.41	1.13	0.45	0.80	0.66	0.72	7.16
Zone 2 - Colne	5.41	17.22	1.19	3.76	2.39	3.33	33.31
Zone 2 - Other	0.08	3.30	0.15	0.44	0.00	0.21	4.18
Zone 3 - Barrowford	1.69	0.97	5.62	0.76	0.47	0.50	10.02
Zone 3 - Other	0.65	0.13	6.05	1.44	0.00	0.43	8.70
Zone 4 - Brierfield	0.00	0.00	0.00	1.16	0.00	0.06	1.22
Zone 4 - Other	0.08	0.22	0.00	0.24	0.71	0.07	1.31
Zone 5 - Barnoldswick	0.36	0.97	0.00	0.00	6.39	0.41	8.13
Zone 5 - Earby	0.08	0.63	0.48	0.00	3.18	0.23	4.60
Zone 5 - Other	0.16	1.54	0.33	1.28	1.89	0.27	5.48
Pendle sub-total	11.92	26.12	14.26	9.88	15.69	6.23	84.10
Burnley	3.41	1.23	0.57	14.68	0.21		20.10
Blackburn	3.64	0.00	0.00	4.08	0.00		7.72
Clitheroe	0.26	0.00	1.30	0.24	0.26		2.06
Keighley	0.00	0.00	0.00	0.00	0.45		0.45
Manchester	4.58	0.09	0.59	2.72	1.79		9.78
Preston	0.00	0.00	0.00	0.24	0.63		0.87
Skipton	0.08	0.72	0.00	0.88	2.81		4.49
Other	2.13	3.27	1.82	7.28	4.44		18.94
Other sub-total	14.11	5.31	4.28	30.12	10.59		64.41
TOTAL	26.03	31.43	18.55	40.00	26.28		148.52

Source: Tables 3 and 4

Table 7 - Future 2030 food/beverage expenditure patterns by zone (£M)

Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow	Total
Expenditure 2030	27.57	33.23	19.51	42.52	27.84		150.68
Zone 1 - Nelson	3.61	1.20	0.47	0.85	0.70	0.76	7.58
Zone 2 - Colne	5.73	18.21	1.25	4.00	2.53	3.53	35.25
Zone 2 - Other	0.08	3.49	0.16	0.47	0.00	0.22	4.42
Zone 3 - Barrowford	1.79	1.03	5.91	0.81	0.50	0.53	10.57
Zone 3 - Other	0.69	0.13	6.36	1.53	0.00	0.46	9.17
Zone 4 - Brierfield	0.00	0.00	0.00	1.23	0.00	0.06	1.30
Zone 4 - Other	0.08	0.23	0.00	0.26	0.75	0.07	1.39
Zone 5 - Barnoldswick	0.39	1.03	0.00	0.00	6.77	0.43	8.61
Zone 5 - Earby	0.08	0.66	0.51	0.00	3.37	0.24	4.87
Zone 5 - Other	0.17	1.63	0.35	1.36	2.00	0.29	5.80
Pendle sub-total	12.63	27.62	15.00	10.50	16.62	6.59	88.96
Burnley	3.61	1.30	0.60	15.61	0.22		21.34
Blackburn	3.86	0.00	0.00	4.34	0.00		8.20
Clitheroe	0.28	0.00	1.37	0.26	0.28		2.17
Keighley	0.00	0.00	0.00	0.00	0.47		0.47
Manchester	4.85	0.10	0.62	2.89	1.89		10.36
Preston	0.00	0.00	0.00	0.26	0.67		0.92
Skipton	0.08	0.76	0.00	0.94	2.98		4.76
Other	2.26	3.46	1.91	7.74	4.71		20.07
Other sub-total	14.94	5.62	4.51	32.02	11.22		68.31
TOTAL	27.57	33.23	19.51	42.52	27.84		157.27

Source: Tables 3 and 4

Table 8 - Future 2035 food/beverage expenditure patterns by zone (£M)

Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow	Total
Expenditure 2035	29.02	34.96	20.48	44.82	29.23		158.52
Zone 1 - Nelson	3.80	1.26	0.49	0.90	0.73	0.80	7.98
Zone 2 - Colne	6.04	19.16	1.31	4.21	2.66	3.71	37.09
Zone 2 - Other	0.09	3.67	0.16	0.49	0.00	0.23	4.65
Zone 3 - Barrowford	1.89	1.08	6.21	0.85	0.53	0.56	11.11
Zone 3 - Other	0.73	0.14	6.68	1.61	0.00	0.48	9.64
Zone 4 - Brierfield	0.00	0.00	0.00	1.30	0.00	0.07	1.37
Zone 4 - Other	0.09	0.24	0.00	0.27	0.79	0.07	1.46
Zone 5 - Barnoldswick	0.41	1.08	0.00	0.00	7.10	0.45	9.05
Zone 5 - Earby	0.09	0.70	0.53	0.00	3.54	0.26	5.11
Zone 5 - Other	0.17	1.71	0.37	1.43	2.10	0.30	6.10
Pendle sub-total	13.29	29.05	15.75	11.07	17.45	6.93	93.55
Burnley	3.80	1.36	0.63	16.45	0.23		22.48
Blackburn	4.06	0.00	0.00	4.57	0.00		8.64
Clitheroe	0.29	0.00	1.43	0.27	0.29		2.29
Keighley	0.00	0.00	0.00	0.00	0.50		0.50
Manchester	5.11	0.10	0.66	3.05	1.99		10.90
Preston	0.00	0.00	0.00	0.27	0.70		0.97
Skipton	0.09	0.80	0.00	0.99	3.13		5.00
Other	2.38	3.64	2.01	8.16	4.94		21.12
Other sub-total	15.73	5.91	4.73	33.75	11.78		71.90
TOTAL	29.02	34.96	20.48	44.82	29.23		165.45

Source: Tables 3 and 4

Table 9 - Future 2040 food/beverage expenditure patterns by zone (£M)

Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow	Total
Expenditure 2040	30.79	36.91	21.31	47.22	30.71		166.94
Zone 1 - Nelson	4.03	1.33	0.51	0.94	0.77	0.84	8.43
Zone 2 - Colne	6.40	20.23	1.36	4.44	2.79	3.91	39.14
Zone 2 - Other	0.09	3.88	0.17	0.52	0.00	0.25	4.90
Zone 3 - Barrowford	2.00	1.14	6.46	0.90	0.55	0.58	11.63
Zone 3 - Other	0.77	0.15	6.95	1.70	0.00	0.50	10.07
Zone 4 - Brierfield	0.00	0.00	0.00	1.37	0.00	0.07	1.44
Zone 4 - Other	0.09	0.26	0.00	0.28	0.83	0.08	1.54
Zone 5 - Barnoldswick	0.43	1.14	0.00	0.00	7.46	0.48	9.51
Zone 5 - Earby	0.09	0.74	0.55	0.00	3.72	0.27	5.37
Zone 5 - Other	0.18	1.81	0.38	1.51	2.21	0.32	6.42
Pendle sub-total	14.10	30.67	16.38	11.66	18.33	7.30	98.46
Burnley	4.03	1.44	0.66	17.33	0.25		23.71
Blackburn	4.31	0.00	0.00	4.82	0.00		9.13
Clitheroe	0.31	0.00	1.49	0.28	0.31		2.39
Keighley	0.00	0.00	0.00	0.00	0.52		0.52
Manchester	5.42	0.11	0.68	3.21	2.09		11.51
Preston	0.00	0.00	0.00	0.28	0.74		1.02
Skipton	0.09	0.85	0.00	1.04	3.29		5.27
Other	2.52	3.84	2.09	8.59	5.19		22.24
Other sub-total	16.69	6.24	4.92	35.56	12.38		75.78
TOTAL	30.79	36.91	21.31	47.22	30.71		174.24

Source: Tables 3 and 4

Table 10 - Food/beverage uses in Pendle's designated centres/shopping frontages

Location	Restaurant / cafés	Pubs / bars	Hot food takeaways	All outlets	Gross floorspace (sq.m)
Nelson	8	2	18	28	3,254
Colne	11	12	11	34	5,405
Barnoldswick	10	5	12	27	2,135
Barrowford	12	3	4	19	1,951
Brierfield	1	1	8	10	1,017
Earby	3	1	3	7	586
TOTAL	45	24	56	125	14,348

Source: Pendle Council Land Use Survey 2022

Table 11 - Summary of food/beverage expenditure 2022 to 2040 (£M)

Destination	2022	2025	2030	2035	2040
Available expenditure					
Zone 1 - Nelson	6.89	7.16	7.58	7.98	8.43
Zone 2 - Colne	32.08	33.31	35.25	37.09	39.14
Zone 2 - Other	4.02	4.18	4.42	4.65	4.90
Zone 3 - Barrowford	9.65	10.02	10.57	11.11	11.63
Zone 3 - Other	8.37	8.70	9.17	9.64	10.07
Zone 4 - Brierfield	1.17	1.22	1.30	1.37	1.44
Zone 4 - Other	1.27	1.31	1.39	1.46	1.54
Zone 5 - Barnoldswick	7.84	8.13	8.61	9.05	9.51
Zone 5 - Earby	4.43	4.60	4.87	5.11	5.37
Zone 5 - Other	5.27	5.48	5.80	6.10	6.42
Total	81.00	84.10	88.96	93.55	98.46
Turnover of existing facilities					
Zone 1 - Nelson	6.89	7.00	7.17	7.35	7.54
Zone 2 - Colne	32.08	32.57	33.39	34.23	35.10
Zone 2 - Other	4.02	4.08	4.19	4.29	4.40
Zone 3 - Barrowford	9.65	9.79	10.04	10.29	10.55
Zone 3 - Other	8.37	8.50	8.71	8.93	9.16
Zone 4 - Brierfield	1.17	1.19	1.22	1.25	1.28
Zone 4 - Other	1.27	1.28	1.32	1.35	1.38
Zone 5 - Barnoldswick	7.84	7.95	8.15	8.36	8.57
Zone 5 - Earby	4.43	4.50	4.61	4.73	4.85
Zone 5 - Other	5.27	5.35	5.49	5.63	5.77
Total	81.00	82.22	84.30	86.42	88.61
Surplus/deficit expenditure £M					
Zone 1 - Nelson	0.00	0.16	0.41	0.62	0.89
Zone 2 - Colne	0.00	0.74	1.86	2.85	4.05
Zone 2 - Other	0.00	0.09	0.23	0.35	0.50
Zone 3 - Barrowford	0.00	0.23	0.53	0.82	1.08
Zone 3 - Other	0.00	0.20	0.46	0.71	0.91
Zone 4 - Brierfield	0.00	0.03	0.08	0.12	0.16
Zone 4 - Other	0.00	0.03	0.08	0.11	0.16
Zone 5 - Barnoldswick	0.00	0.18	0.46	0.69	0.94
Zone 5 - Earby	0.00	0.10	0.26	0.38	0.52
Zone 5 - Other	0.00	0.12	0.31	0.47	0.65
Total	0.00	1.88	4.67	7.12	9.85

Source: Tables 5 to 10

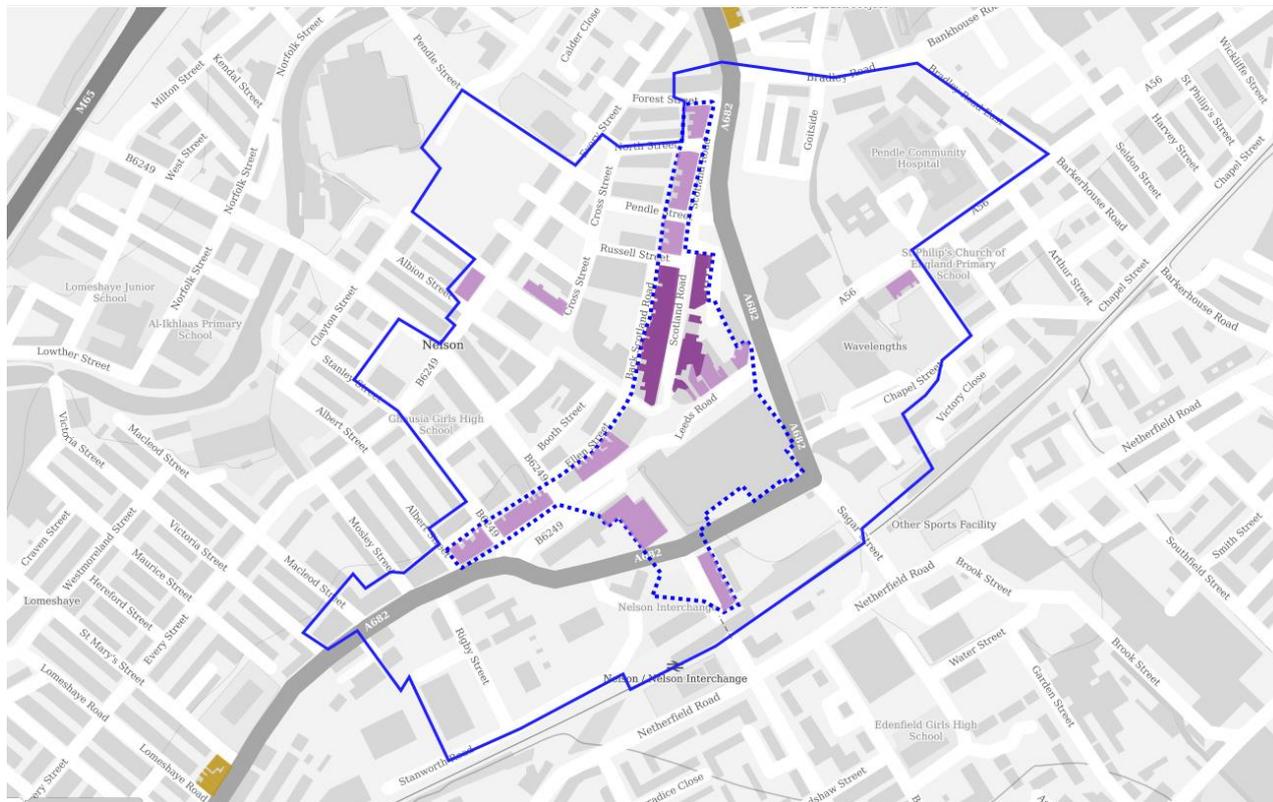
Table 12 - Food/beverage floorspace capacity up to 2040

	2022	2025	2030	2035	2040
Turnover density new floorspace (£ per sq.m)	£5,000	£5,075	£5,204	£5,335	£5,470
Floorspace projection (sq.m gross)					
Zone 1 - Nelson	0	32	79	117	163
Zone 2 - Colne	0	146	357	535	740
Zone 2 - Other	0	18	44	66	92
Zone 3 - Barrowford	0	45	102	153	198
Zone 3 - Other	0	39	88	132	166
Zone 4 - Brierfield	0	6	15	22	29
Zone 4 - Other	0	6	14	21	29
Zone 5 - Barnoldswick	0	35	88	128	172
Zone 5 - Earby	0	20	49	72	95
Zone 5 - Other	0	24	60	88	119
Total	0	371	897	1,335	1,801

Source: Table 11

Appendix 5 Town and local centre analysis

Nelson Town Centre



Nelson town centre has 252 retail and service units and is the largest centre in terms of the number of units in the Borough. The mix of uses is set out in Table N1, which is compared with the Pendle and UK averages. More detailed breakdowns of comparison goods retail and non-retail services are shown in Table N2 and N4. The mix of uses in Nelson broadly reflects the Pendle and UK averages, but there are several differences. The centre has a low proportion of restaurant/café and pubs/bars and a higher vacancy rate. There is a relatively low provision of other non-retail services.

Table N1 - Mix of shop and service uses – Nelson

Type	Number units	% units	Pendle average	UK average
Comparison goods retail	75	29.8	27.9	29.0
Convenience goods retail	22	8.7	10.5	9.7
Financial/professional services	26	10.3	9.8	9.0
Restaurants/café	8	3.2	6.1	10.0
Pubs/bars	2	0.8	3.3	4.9
Hot food takeaways	17	6.7	7.0	6.2
Other non-retail services	28	11.1	17.9	16.5
Vacant	74	29.4	17.6	14.7
Total	252	100.0	100.0	100.0

Source: Pendle land use survey 2022 and Experian Goad Plan national averages.

The shop vacancy rate (29.4%) is significantly higher than both the Pendle and UK averages and is the highest in the Borough’s six main centres.

Nelson has 75 comparison goods shops, the highest in the Borough. There is a reasonable range and choice of shops with 13 of the 14 Goad Plan shop categories represented, as shown in Table N2.

There is a good choice of shops in some categories including clothing/footwear, furniture/carpets/textiles, electrical/music/photography and DIY/hardware/homeware.

Nelson has a small selection of national comparison goods multiples as shown in Table N3.

The centre has 81 non-retail services as shown in Table N4, which is the second highest provision after Colne (105 services). The food/beverage offer is dominated by hot food takeaways rather than restaurant/cafés and pubs/bars.

There is a relatively high provision of betting shops and travel agents and a reasonable provision of hairdressers and beauty parlours.

The relatively large number of other non-retail services (21 outlets) include accountants and solicitors offices.

Table N2 - Mix of comparison goods uses – Nelson

Type	Number units	% units	Pendle average	UK average
Clothing and footwear	16	21.3	15.5	21.5
Furniture, carpets and textiles	9	12.0	12.0	7.6
Books, arts, cards and stationers	2	2.7	4.5	7.7
Electrical, music and photography	11	14.7	11.5	9.1
DIY, hardware and homeware	11	14.7	10.5	6.6
China, glass and gifts	1	1.3	4.5	5.3
Cars, motorcycles and accessories	0	0.0	0.0	1.3
Chemists, drug stores and opticians	7	9.3	9.5	11.7
Variety, department and catalogue	2	2.7	1.5	1.8
Florists, nurserymen and seedsmen	1	1.3	2.5	2.2
Toys, hobby, cycle and sports	3	4.0	5.5	5.3
Jewellers	4	5.3	5.0	5.0
Charity and second-hand shops	4	5.3	8.5	9.9
Other comparison good retailers	4	5.3	9.0	5.0
Total	75	100.0	100.0	100.0

Source: Pendle land use survey 2022 and Experian Goad Plan national averages.

Table N3 – Nelson’s comparison multiples

Boots the Chemist	Card Factory	Home Bargains
Specsavers	Wilko	

Source: Pendle land use survey 2022

Table N4 - Mix of service uses – Nelson

Type	Number Units	% units	Pendle average	UK average
Restaurants/cafés	8	13.3	17.2	23.8
Fast food/takeaways	17	28.3	19.5	14.7
Pubs/bars	2	3.3	9.4	11.7
Banks/other financial services	3	5.0	6.3	8.6
Betting shops/casinos/amusement	3	5.0	2.3	3.8
Estate agents/valuers	3	5.0	5.9	7.9
Travel agents	5	8.3	3.1	1.7
Hairdressers/beauty parlours	18	30.0	33.6	26.1
Launderettes/dry cleaners	1	1.7	2.7	1.7
Sub-total	60	100.0	100.0	100.0
Other	21			
Total	81			

Source: Pendle land use survey 2022 and Experian Goad Plan national averages.

Catchment area and market share

The household survey results indicate 48% of respondents across the study area had visited shops, services or leisure facilities at Nelson town centre in the last 12 months, the second highest percentage for the six main centres in the Borough. The proportion of respondents visiting Nelson was over 18% in all study area zones indicating the centre has an extensive Borough wide catchment area. Nearly 13% of respondents indicated they do most of their non-food shopping in Nelson, the highest figure for centres in the Borough. The retail capacity analysis suggests Nelson attracts 16.3% of comparison goods expenditure within the study area.

The combined base year turnover of Nelson is estimated to be £123.18 million, the second highest turnover in Pendle behind Colne. Nelson's turnover is split £62.51 million for convenience retail goods, £53.78 million for comparison retail goods and £6.89 million for food/beverage. The food/beverage turnover is the third lowest of the six main centres.

Shop rental levels

According to the VOA, Zone A retail rents vary throughout the centre. Along the main shopping thoroughfare Zone A retail rents on Scotland Road range from £90 to £140 per sq.m, with the higher end achieved in the primary shopping frontages at the southern end. Within the Pendle Rise Shopping Centre, Zone A retail rents are slightly lower at £120 per sq.m. The town centre has the third lowest prime retail rental levels of the main centres in the Borough. Within the peripheral shopping streets Zone A retail rents range from £90 to £115 per sq.m and are much more affordable accommodation for small independent traders.

Public car parks and accessibility

Within Zone 1 – Nelson 72% of households do their main food shopping by car and 66% do their non-food-shopping by car, which is lower than the Borough averages of 82% and 74% respectively. Nevertheless, the availability of free car parking spaces is important in Nelson town centre.

Nelson has six short stay car parks with 303 car parking spaces. Most of these car parks are relatively small with less than 30 spaces. Goitside is the largest short stay car park within 148 spaces. Nelson has 10 long stay car parks with 317 spaces. Total long and short stay provision is 620 spaces.

In the household survey a limited number of respondents mentioned car parking as a positive aspect of Nelson, but only 4% indicated more car parking would encourage them to visit the centre more often.

Environment and street cleanliness

In the household survey a limited number of respondents mentioned the environment and street cleanliness as positive aspects of Nelson. Over 8% indicated an improved environment would encourage them to visit the centre more often, which was the highest figure for all six centres. Nelson performs the least well in the Borough in terms of environmental indicators.

Levels of Crime

There were 4,281 crimes reported in Nelson in the year to September 2022, indicating a crime rate of 146 crimes per 1,000 people. This is higher than the Pendle Borough crime rate of 113 crimes per 1,000 people over the same period and is the second highest rate of crime of the towns assessed in this study.

Customer views

As part of the household survey, respondents were asked if they had used shops and services in Nelson in the last year. Nearly 48% of respondents in the study area had visited Nelson, which was the second highest figure in Borough after Colne (57%). Of those who had used shops/services in Nelson, respondents were asked what they like about the town centre and what improvements would make them visit more often. The main factor liked in Nelson was 19% mentioning that it was close to home. However, over 39% said there was nothing they like about Nelson.

The other main factors and improvements mentioned (5% of respondents or more) were:

- **factors liked:** good layout/compact (10%); familiarity/know where everything is (5%).
- **improvements mentioned:** more high street shops (26%); more non-food shops in general (22%); more independent shops (20%); more clothing shops (15%) better quality shops (9%); nicer environment (8%); and less empty shops (7%).

Nelson generally had low levels of satisfaction and higher levels of dissatisfaction.

Colne Town Centre



Colne town centre has 196 retail and service units and is the second largest centre in terms of the number of units in the Borough. The mix of uses is set out in Table C1, which is compared with the Pendle and UK averages. More detailed breakdowns of comparison goods retail and non-retail services are shown in Table C2 and C3. The mix of uses in Colne also broadly reflects the Pendle and UK averages, but there are several differences.

Table C1 - Mix of shop and service uses – Colne

Type	Number units	% units	Pendle average	UK average
Comparison goods retail	56	28.6	27.9	29.0
Convenience goods retail	17	8.7	10.5	9.7
Financial/professional services	24	12.2	9.8	9.0
Restaurants/café's	11	5.6	6.1	10.0
Pubs/bars	12	6.1	3.3	4.9
Hot food takeaways	11	5.6	7.0	6.2
Other non-retail services	47	24.0	17.9	16.5
Vacant	18	9.2	17.6	14.7
Total	196	100.0	100.0	100.0

Source: Pendle land use survey 2022 and Experian Goad Plan national averages.

The shop vacancy rate (9.2%) is significantly lower than both the Pendle and UK averages and is the second lowest in the Borough's six main centres.

Colne has 56 comparison goods shops, the second highest in the Borough. There is a reasonable range and choice of shops with 13 of the 14 Goad Plan shop categories represented, as shown in Table C2. There is

a good choice of shops in some categories including furniture/carpets/textiles and electrical/music/photography and DIY/hardware/homeware.

Colne has a limited selection of national comparison goods multiples, excluding charity shops.

Table C2 - Mix of comparison goods uses – Colne

Type	Number units	% units	Pendle average	UK average
Clothing and footwear	4	7.1	15.5	21.5
Furniture, carpets and textiles	11	19.6	12.0	7.6
Books, arts, cards and stationers	3	5.4	4.5	7.7
Electrical, music and photography	7	12.5	11.5	9.1
DIY, hardware and homeware	2	3.6	10.5	6.6
China, glass and gifts	5	8.9	4.5	5.3
Cars, motorcycles and accessories	0	0.0	0.0	1.3
Chemists, drug stores and opticians	5	8.9	9.5	11.7
Variety, department and catalogue	1	1.8	1.5	1.8
Florists, nurserymen and seedsmen	1	1.8	2.5	2.2
Toys, hobby, cycle and sports	5	8.9	5.5	5.3
Jewellers	1	1.8	5.0	5.0
Charity and second-hand shops	5	8.9	8.5	9.9
Other comparison good retailers	6	10.7	9.0	5.0
Total	56	100.0	100.0	100.0

Source: Pendle land use survey 2022 and Experian Good Plan national averages.

The centre has 105 non-retail services as shown in Table C3, which is the highest provision in the Borough. The proportion of restaurant/cafés is relatively low but there is a good provision of pubs/bars. The hot food takeaways sector is reasonably well represented. There is a relatively high provision of banks/financial services and hairdressers/beauty parlours. The relatively large number of other non-retail services (22 outlets) include accountants and solicitors offices.

Table C3 - Mix of service uses – Colne

Type	Number Units	% units	Pendle average	UK average
Restaurants/cafés	11	13.3	17.2	23.8
Fast food/takeaways	11	13.3	19.5	14.7
Pubs/bars	12	14.5	9.4	11.7
Banks/other financial services	7	8.4	6.3	8.6
Betting shops/casinos/amusement	2	2.4	2.3	3.8
Estate agents/valuers	4	4.8	5.9	7.9
Travel agents	2	2.4	3.1	1.7
Hairdressers/beauty parlours	28	33.7	33.6	26.1
Launderettes/dry cleaners	6	7.2	2.7	1.7
Sub-total	83	100.0	100.0	100.0
Other	22			
Total	105			

Source: Pendle land use survey 2022 and Experian Goad Plan national averages.

Catchment area and market share

The household survey results indicate 58% of respondents across the study area had visited shops, services or leisure facilities at Colne in the last 12 months, the highest percentage for the six main centres in the Borough. The proportion of respondents visiting Colne was over 35% in all study area zones indicating the centre has an extensive Borough wide catchment area. Over 5% of respondents indicated they do most of their non-food shopping in Colne, the second highest figure for centres in the Borough. The retail capacity analysis suggests Colne attracts 31.1% of comparison goods expenditure within the study area.

The combined base year turnover of Colne is estimated to be £239.17 million, by far the highest turnover in Pendle. However, this turnover figure includes the retail parks to the north of the town centre and Boundary Outlet. Colne's turnover is split £104.77 million for convenience retail goods, £102.32 million for comparison retail goods and £32.08 million for food/beverage, indicating the centre has a good mix of trade.

Shop rental levels

According to the VOA, Zone A retail rents vary throughout the centre. Along the main shopping thoroughfare Zone A retail rents on Market Street range from £140 to £200 per sq.m. The town centre has the second highest prime retail rental levels of the main centres in the Borough. Within the peripheral shopping streets Zone A retail rents range from £100 to £140 per sq.m and are much more affordable accommodation for small independent traders.

Public car parks and accessibility

Within Zone 2 – Colne 77% of households do their main food shopping by car and 68% do their non-food-shopping by car, which is lower than the Borough averages of 82% and 74% respectively. Nevertheless, the availability of free car parking spaces is important in Colne town centre.

Colne has one short stay car park i.e. Dockray Street with 90 car parking spaces. There are 14 long stay car parks with 396 spaces. Total long and short stay provision is 486 spaces.

In the household survey a limited number of respondents mentioned car parking as a positive aspect of Colne, but only 5% indicated more car parking would encourage them to visit the centre more often.

Environment and street cleanliness

In the household survey 17% of respondents mentioned the environment and 8% mentioned street cleanliness as positive aspects of Colne. Only 2% indicated an improved environment would encourage them to visit the centre more often. Colne performs well compared with most centres in the Borough in terms of environmental indicators.

Levels of Crime

There were 3,012 crimes reported in Colne in the year to September 2022, indicating a crime rate of 169 crimes per 1,000 people. This is higher than the Pendle Borough crime rate of 113 crimes per 1,000 people over the same period and is the highest rate of crime of the towns assessed in this study.

Customer views

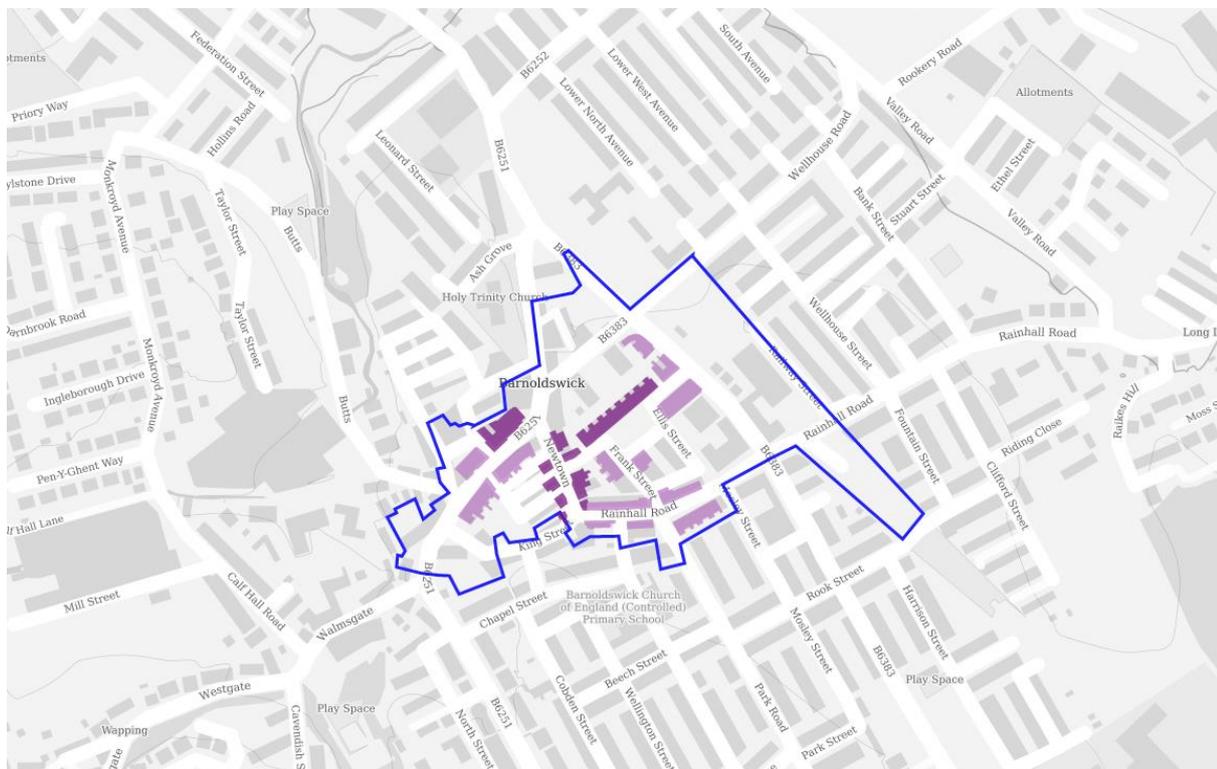
Respondents were asked if they had used shops and services in Colne in the last year. Over 57% of respondents in the study area had visited Colne, which was the highest figure in the Borough. Of those who had used shops/services in Colne, respondents were asked what they like about the town centre and what improvements would make them visit more often. The one main factor liked in Colne was 16% mentioning that it was close to home. Only 12% said there was nothing they like about Colne.

The other main factors and improvements mentioned (5% of respondents or more) were:

- **factors liked:** attractive environment (17%); good range of independent shops (16%); good range of non-food shops generally (13%); nice/friendly atmosphere (9%); good/compact layout (9%); good market (8%); clean/well maintained streets (8%); affordable shops (7%); and good quality shops (5%).
- **improvements mentioned:** better street market (7%); less traffic congestion (5%); more high street shops (26%); and more non-food shops in general (5%).

Colne generally had high levels of satisfaction and lower levels of dissatisfaction.

Barnoldswick Town Centre



Barnoldswick is the smallest of the three designated Town Centres in Pendle with 129 retail and service units. The mix of uses is set out in Table BLK1, which is compared with the Pendle and UK averages. More detailed breakdowns of comparison goods retail and non-retail services are shown in Table BLK2 and BLK3. The centre has a lower proportion of comparison good shops when compared with the Pendle and UK averages but has a higher proportion of convenience goods shops. The centre has a relatively high proportion of food/beverage uses when compared with the Pendle average but lower than the UK average, particularly restaurant/café. There is a relatively high provision of other non-retail services.

Table BLK1 - Mix of shop and service uses – Barnoldswick

Type	Number units	% units	Pendle average	UK average
Comparison goods retail	33	25.6	27.9	29.0
Convenience goods retail	17	13.2	10.5	9.7
Financial/professional services	11	8.5	9.8	9.0
Restaurants/café	9	7.0	6.1	10.0
Pubs/bars	5	3.9	3.3	4.9
Hot food takeaways	11	8.5	7.0	6.2
Other non-retail services	28	21.7	17.9	16.5
Vacant	15	11.6	17.6	14.7
Total	129	100.0	100.0	100.0

Source: Pendle land use survey 2022 and Experian Goad Plan national averages.

The shop vacancy rate (11.6%) is significantly lower than the Pendle average and is the third lowest in the Borough’s six main centres.

Barnoldswick has only 33 comparison goods shops, much lower than the other two town centres, Colne and Nelson. There is a reasonable range of shops with 12 of the 14 Goad Plan shop categories represented, as shown in Table BLK2, but the choice within each category is limited i.e. one to four shops. Most comparison shops are small independent traders.

Table BLK2 - Mix of comparison goods uses – Barnoldswick

Type	Number units	% units	Pendle average	UK average
Clothing and footwear	1	3.0	15.5	21.5
Furniture, carpets and textiles	1	3.0	12.0	7.6
Books, arts, cards and stationers	3	9.1	4.5	7.7
Electrical, music and photography	4	12.1	11.5	9.1
DIY, hardware and homeware	2	6.1	10.5	6.6
China, glass and gifts	2	6.1	4.5	5.3
Cars, motorcycles and accessories	0	0.0	0.0	1.3
Chemists, drug stores and opticians	4	12.1	9.5	11.7
Variety, department and catalogue	0	0.0	1.5	1.8
Florists, nurserymen and seedsmen	1	3.0	2.5	2.2
Toys, hobby, cycle and sports	3	9.1	5.5	5.3
Jewellers	3	9.1	5.0	5.0
Charity and second-hand shops	3	9.1	8.5	9.9
Other comparison good retailers	6	18.2	9.0	5.0
Total	33	100.0	100.0	100.0

Source: Pendle land use survey 2022 and Experian Goad Plan national averages.

The centre has 55 non-retail services as shown in Table BLK3, which is the third highest provision after Colne (105 services) and Nelson (81). There is a reasonable mix of restaurant/cafés, pubs/bars and hot food takeaways.

There is a relatively high provision of estate agents and hairdressers and beauty parlours but a limited provision of banks/other financial services.

Table BLK3 - Mix of service uses – Barnoldswick

Type	Number Units	% units	Pendle average	UK average
Restaurants/cafés	9	16.1	17.2	23.8
Fast food/takeaways	11	19.6	19.5	14.7
Pubs/bars	5	8.9	9.4	11.7
Banks/other financial services	3	5.4	6.3	8.6
Betting shops/casinos/amusement	1	1.8	2.3	3.8
Estate agents/valuers	6	10.7	5.9	7.9
Travel agents	0	0.0	3.1	1.7
Hairdressers/beauty parlours	21	37.5	33.6	26.1
Launderettes/dry cleaners	0	0.0	2.7	1.7
Sub-total	56	100.0	100.0	100.0
Other	8			
Total	64			

Source: Pendle land use survey 2022 and Experian Goad Plan national averages.

Catchment area and market share

The household survey results indicate 25% of respondents across the study area had visited shops, services or leisure facilities at Barnoldswick town centre in the last 12 months, the fourth highest percentage for the six main centres in the Borough. Barnoldswick attracts most of these customers from Zone 5 – Barnoldswick, followed by Zone 2 – Colne and Zone 3 Barrowford, indicating the centre primarily serves the northern half of the Borough. Only 1.5% of respondents indicated they do most of their non-food shopping in Barnoldswick, significantly lower than Nelson and Colne but higher than Brierfield, Barrowford and Earby. The retail capacity analysis suggests Barnoldswick attracts only 3.8% of comparison goods expenditure within the study area.

The combined base year turnover of Barnoldswick is estimated to be £44.52 million, the third highest turnover in Pendle behind Colne and Nelson. Barnoldswick’s turnover is split £24.83 million for convenience retail goods, £11.85 million for comparison retail goods and £7.84 million for food/beverage, indicating the centre has a reasonable trade mix.

Shop rental levels

According to the VOA, Zone A retail rents do not vary significantly throughout the centre. Along Newtown and Church Street Zone A retail rents are £150 per sq.m. The town centre has the third highest prime retail rental levels of the main centres in the Borough. Within the peripheral shopping streets Zone A retail rents are £125 per sq.m.

Public car parks and accessibility

Within Zone 5 – Barnoldswick and Earby 88% of households do their main food shopping by car and 81% do their non-food-shopping by car, which is higher than the Borough averages of 82% and 74% respectively. The availability of free car parking spaces is important in Barnoldswick town centre.

Barnoldswick has 7 car parks with 212 car parking spaces. Most of these car parks are small. Wellhouse Road is the largest car park with 79 spaces.

In the household survey a limited number of respondents mentioned car parking as a positive aspect of Barnoldswick, but only 6% indicated more car parking would encourage them to visit the centre more often.

Environment and street cleanliness

In the household survey 18% of respondents mentioned the environment and 2% mentioned street cleanliness as positive aspects of Barnoldswick. Less than 1% indicated an improved environment would encourage them to visit the centre more often. Barnoldswick performs well compared with most centres in the Borough in terms of environmental indicators.

Levels of Crime

There were 852 crimes reported in Barnoldswick in the year to September 2022, indicating a crime rate of 79 crimes per 1,000 people. This is much lower than the Pendle Borough crime rate of 113 crimes per 1,000 people over the same period and is the third lowest rate of crime of the towns assessed in this study.

Customer views

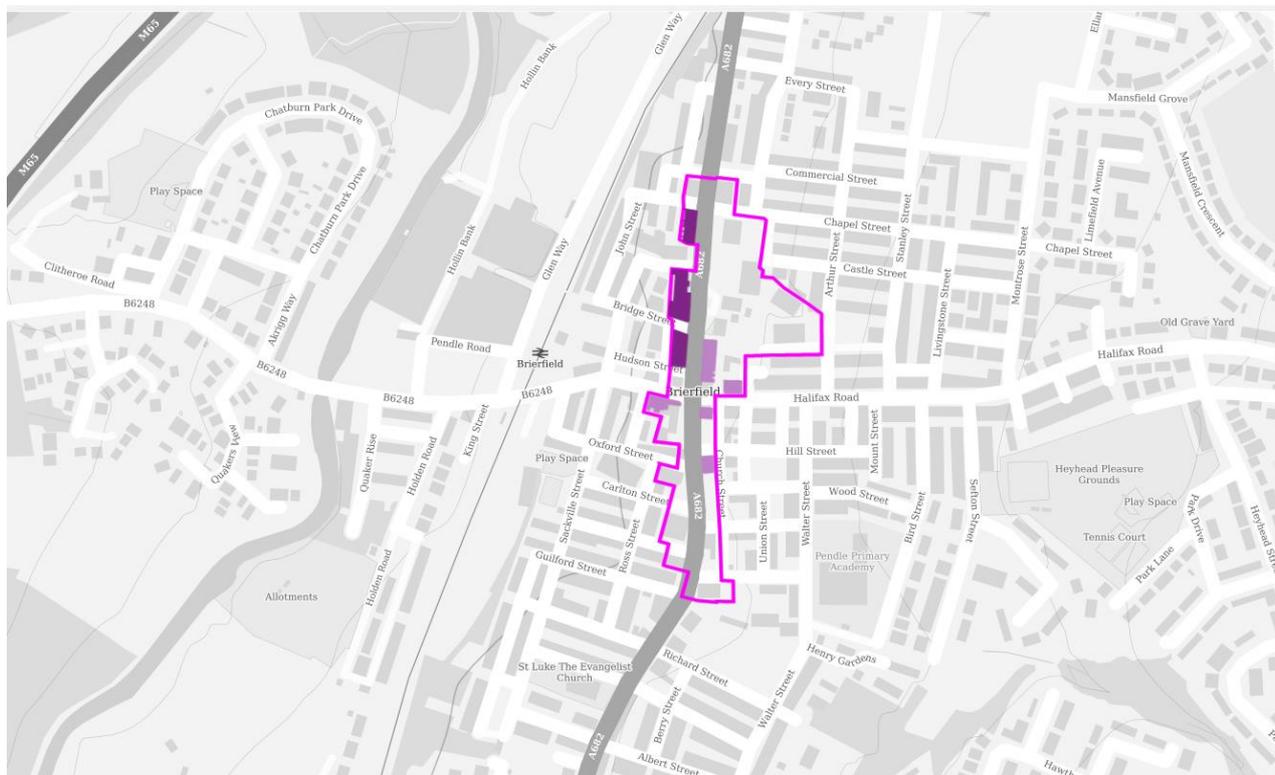
Respondents were asked if they had used shops and services in Barnoldswick in the last year. Over 25% of respondents in the study area had visited Barnoldswick, which was lower than Colne, Nelson and Barrowford. Of those who had used shops/services in Barnoldswick, respondents were asked what they like about the town centre and what improvements would make them visit more often. The main factor liked in Barnoldswick was 25% mentioning that it was close to home. Only 9% said there was nothing they like about Barnoldswick.

The other main factors and improvements mentioned (5% of respondents or more) were:

- **factors liked:** attractive/nice environment (18%); good range of independent shops (13%); good layout/compact (11%); nice/friendly atmosphere (11%); good range of non-food shops generally (10%); good cafés/restaurants (7%); familiarity/know where everything is (7%); good events (5%); and good supermarkets (5%).
- **improvements mentioned:** more car parking spaces (6%).

Barnoldswick generally had high levels of satisfaction and lower levels of dissatisfaction.

Brierfield Local Shopping Centre



Brierfield Local Shopping Centre has 48 retail and service units and is the fifth largest centre in terms of the number of units in the Borough. The mix of uses is set out in Table BR1, which is compared with the Pendle and UK averages. More detailed breakdowns of comparison goods retail and non-retail services are shown in Table BR2 and BR3. Brierfield has a low proportion of comparison good shops, but a relatively high proportion of convenience goods shops.

Table BR1 - Mix of shop and service uses – Brierfield

Type	Number units	% units	Pendle average	UK average
Comparison goods retail	9	18.8	27.9	29.0
Convenience goods retail	6	12.5	10.5	9.7
Financial/professional services	4	8.3	9.8	9.0
Restaurants/cafés	1	2.1	6.1	10.0
Pubs/bars	1	2.1	3.3	4.9
Hot food takeaways	6	12.5	7.0	6.2
Other non-retail services	12	25.0	17.9	16.5
Vacant	9	18.8	17.6	14.7
Total	48	100.0	100.0	100.0

Source: Pendle land use survey 2022 and Experian Goad Plan national averages.

The centre has a particularly low provision of restaurants/cafés and pubs/bars but has a good provision of hot food takeaways and other non-retail services.

The shop vacancy rate (18.8%) is significantly higher than the UK averages and above the Pendle average. Brierfield has the third highest vacancy rate in the Borough’s six main centres.

Brierfield has only 9 comparison goods shops, the lowest of the three Local Shopping Centres in the Borough. The range and choice of comparison shops is limited with only 6 of the 14 Goad Plan shop categories represented, as shown in Table BR2.

Table BR2 - Mix of comparison goods uses – Brierfield

Type	Number units	% units	Pendle average	UK average
Clothing and footwear	2	22.2	15.5	21.5
Furniture, carpets and textiles	0	0.0	12.0	7.6
Books, arts, cards and stationers	0	0.0	4.5	7.7
Electrical, music and photography	1	11.1	11.5	9.1
DIY, hardware and homeware	3	33.3	10.5	6.6
China, glass and gifts	0	0.0	4.5	5.3
Cars, motorcycles and accessories	0	0.0	0.0	1.3
Chemists, drug stores and opticians	1	11.1	9.5	11.7
Variety, department and catalogue	0	0.0	1.5	1.8
Florists, nurserymen and seedsmen	0	0.0	2.5	2.2
Toys, hobby, cycle and sports	0	0.0	5.5	5.3
Jewellers	1	11.1	5.0	5.0
Charity and second-hand shops	0	0.0	8.5	9.9
Other comparison good retailers	1	11.1	9.0	5.0
Total	9	100.0	100.0	100.0

Source: Pendle land use survey 2022 and Experian Goad Plan national averages.

The centre has 24 non-retail services as shown in Table BR3, which is the second lowest provision after Earby (10 services). There is a reasonable choice of hot food takeaways and hairdresser/beauty parlours.

Table BR3 - Mix of service uses – Brierfield

Type	Number Units	% units	Pendle average	UK average
Restaurants/cafés	1	5.6	17.2	23.8
Fast food/takeaways	6	33.3	19.5	14.7
Pubs/bars	1	5.6	9.4	11.7
Banks/other financial services	1	5.6	6.3	8.6
Betting shops/casinos/amusement	0	0.0	2.3	3.8
Estate agents/valuers	0	0.0	5.9	7.9
Travel agents	1	5.6	3.1	1.7
Hairdressers/beauty parlours	8	44.4	33.6	26.1
Launderettes/dry cleaners	0	0.0	2.7	1.7
Sub-total	18	100.0	100.0	100.0
Other	6			
Total	24			

Source: Pendle land use survey 2022 and Experian Goad Plan national averages.

Catchment area and market share

The household survey results indicate only 9% of respondents across the study area had visited shops, services or leisure facilities at Brierfield in the last 12 months, the second lowest percentage for the six main centres in the Borough. Brierfield attracts most of these customers from its local area (Zone 4 – Brierfield, indicating the centre primarily serves the south part of the Borough only). Only 0.3% of respondents indicated they do most of their non-food shopping in Brierfield. The retail capacity analysis suggests Brierfield attracts only 2.3% of comparison goods expenditure within the study area.

The combined base year turnover of Brierfield is estimated to be £11.11 million, the second lowest turnover in Pendle. This turnover is split £2.88 million for convenience retail goods, £7.06 million for comparison retail goods and £1.17 million for food/beverage.

Shop rental levels

According to the VOA, Zone A retail rents do not vary significantly throughout the centre. Along Burnley Road Zone A retail rents are £100 to £125 per sq.m. The town centre has the second lowest prime retail rental levels of the main centres in the Borough.

Public car parks and accessibility

Within Zone 4 – Brierfield 86% of households do their main food shopping by car and 78% do their non-food-shopping by car, which is higher than the Borough averages of 82% and 74% respectively. The availability of free car parking spaces is important in Brierfield.

Brierfield has one short/long stay car park i.e. Tunstill Square with 26 car parking spaces. There are 3 long stay car parks but with only with 69 spaces in total. Total long and short stay provision is 95 spaces.

In the household survey no respondents mentioned car parking as a positive aspect of Brierfield, but no respondents indicated more car parking would encourage them to visit the centre more often.

Environment and street cleanliness

In the household survey a limited number of respondents mentioned the environment and street cleanliness as positive aspects of Brierfield, but only 1% indicated an improved environment would encourage them to visit the centre more often.

Levels of Crime

There were 897 crimes reported in Brierfield in the year to September 2022, indicating a crime rate of 112 crimes per 1,000 people. This is around the Pendle Borough crime rate of 113 crimes per 1,000 people over the same period and is the third highest rate of crime of the towns assessed in this study.

Customer views

Respondents were asked if they had used shops and services in Brierfield in the last year. Only 9% of respondents in the study area had visited Brierfield, which was the second lowest figure in Borough. Of those who had used shops/services in Brierfield, respondents were asked what they like about the centre and what improvements would make them visit more often. The main factor liked in Brierfield was 27% mentioning that it was close to home. However, over 46% said there was nothing they like about Brierfield, the worst figure in the Borough.

The other main factors and improvements mentioned (5% of respondents or more) were:

- **factors liked:** familiarity/know where everything is (10%); good layout/compact (6%); and good range of high street retailers (5%).
- **improvements mentioned:** more traffic free areas /pedestrianisation (13%); more non-food shops generally (13%); better range of financial services (8%); more high street chain retailers (8%); more independent shops (7%).

Brierfield had mixed levels of satisfaction and dissatisfaction.

Barrowford Local Shopping Centre



Barrowford Local Shopping Centre has 51 retail and service units and is the fourth largest centre in terms of the number of units in the Borough. The mix of uses is set out in Table BAR1, which is compared with the Pendle and UK averages. More detailed breakdowns of comparison goods retail and non-retail services are shown in Table BAR2 and BAR3. As in the other Local Shopping Centres, Barrowford has a relatively low proportion of comparison good shops. There is also a relatively low proportion of convenience goods shops.

Table BAR1 - Mix of shop and service uses – Barrowford

Type	Number units	% units	Pendle average	UK average
Comparison goods retail	13	25.5	27.9	29.0
Convenience goods retail	4	7.8	10.5	9.7
Financial/professional services	4	7.8	9.8	9.0
Restaurants/cafés	12	23.5	6.1	10.0
Pubs/bars	3	5.9	3.3	4.9
Hot food takeaways	2	3.9	7.0	6.2
Other non-retail services	11	21.6	17.9	16.5
Vacant	2	3.9	17.6	14.7
Total	51	100.0	100.0	100.0

Source: Pendle land use survey 2022 and Experian Goad Plan national averages.

The centre has a particularly high proportion of restaurants/cafés and other non-retail services. The shop vacancy rate (3.9%) is the lowest in Pendle and significantly lower than the UK average.

Barrowford only has 13 comparison goods shops. The range and choice of comparison shops is limited with only 6 of the 14 Goad Plan shop categories represented, as shown in Table BAR2. However, there is a good choice of clothing/footwear shops.

Table BAR2 - Mix of comparison goods uses – Barrowford

Type	Number units	% units	Pendle average	UK average
Clothing and footwear	7	53.8	15.5	21.5
Furniture, carpets and textiles	0	0.0	12.0	7.6
Books, arts, cards and stationers	0	0.0	4.5	7.7
Electrical, music and photography	0	0.0	11.5	9.1
DIY, hardware and homeware	0	0.0	10.5	6.6
China, glass and gifts	1	7.7	4.5	5.3
Cars, motorcycles and accessories	0	0.0	0.0	1.3
Chemists, drug stores and opticians	1	7.7	9.5	11.7
Variety, department and catalogue	0	0.0	1.5	1.8
Florists, nurserymen and seedsmen	1	7.7	2.5	2.2
Toys, hobby, cycle and sports	0	0.0	5.5	5.3
Jewellers	1	7.7	5.0	5.0
Charity and second-hand shops	2	15.4	8.5	9.9
Other comparison good retailers	0	0.0	9.0	5.0
Total	13	100.0	100.0	100.0

Source: Pendle land use survey 2022 and Experian Goad Plan national averages.

The centre has 32 non-retail services as shown in Table BAR3, which is the highest provision in the three Local Shopping Centres.

There is a good choice of restaurant/cafés and hairdresser/beauty parlours.

Table BAR3 - Mix of service uses – Barrowford

Type	Number Units	% units	Pendle average	UK average
Restaurants/café	12	40.0	17.2	23.8
Fast food/takeaways	2	6.7	19.5	14.7
Pubs/bars	3	10.0	9.4	11.7
Banks/other financial services	1	3.3	6.3	8.6
Betting shops/casinos/amusement	0	0.0	2.3	3.8
Estate agents/valuers	2	6.7	5.9	7.9
Travel agents	0	0.0	3.1	1.7
Hairdressers/beauty parlours	10	33.3	33.6	26.1
Launderettes/dry cleaners	0	0.0	2.7	1.7
Sub-total	30	100.0	100.0	100.0
Other	2			
Total	32			

Source: Pendle land use survey 2022 and Experian Goad Plan national averages.

Catchment area and market share

The household survey results indicate 27% of respondents across the study area had visited shops, services or leisure facilities at Barrowford in the last 12 months, the third highest percentage for the six main centres in the Borough. Barrowford attracts a reasonable number of customers from across the Borough, suggesting the centre has a wider attraction than the other Local Shopping Centres. However, only 0.2% of respondents indicated they do most of their non-food shopping in Barrowford. The retail capacity analysis suggests Barrowford attracts only 2.1% of comparison goods expenditure within the study area.

The combined base year turnover of Barrowford is estimated to be £23.38 million, the third lowest turnover in Pendle. This turnover is split £7.21 million for convenience retail goods, £6.52 million for comparison retail goods and £9.65 million for food/beverage. The food/beverage turnover is the second highest in the Borough behind Colne.

Shop rental levels

According to the VOA, Zone A retail rents do not vary significantly throughout the centre. Along Gisburn Road Zone A retail rents are £350 per sq.m. The town centre has the highest prime retail rental levels of the main centres in the Borough. Within the peripheral shopping streets Zone A retail rents are £250 per sq.m.

Public car parks and accessibility

Within Zone 3 – Barrowford 94% of households do their main food shopping by car and 81% do their non-food-shopping by car, which is higher than the Borough averages of 82% and 74% respectively.

Barrowford has no public car parks.

In the household survey a limited number of respondents mentioned car parking as a positive aspect of Barrowford and 11% indicated more car parking would encourage them to visit the centre more often.

The availability of car parking appears to be more of an issue in Barrowford than in the other five main centres.

Environment and street cleanliness

In the household survey 19% of respondents mentioned the environment and 3% mentioned street cleanliness as positive aspects of Barrowford. No respondents indicated an improved environment would encourage them to visit the centre more often. Barnoldswick performs well compared with most centres in the Borough in terms of environmental indicators.

Levels of Crime

There were 404 crimes reported in Barrowford in the year to September 2022, indicating a crime rate of 65 crimes per 1,000 people. This is much lower than the Pendle Borough crime rate of 113 crimes per 1,000 people over the same period and is the lowest rate of crime of the towns assessed in this study.

Customer views

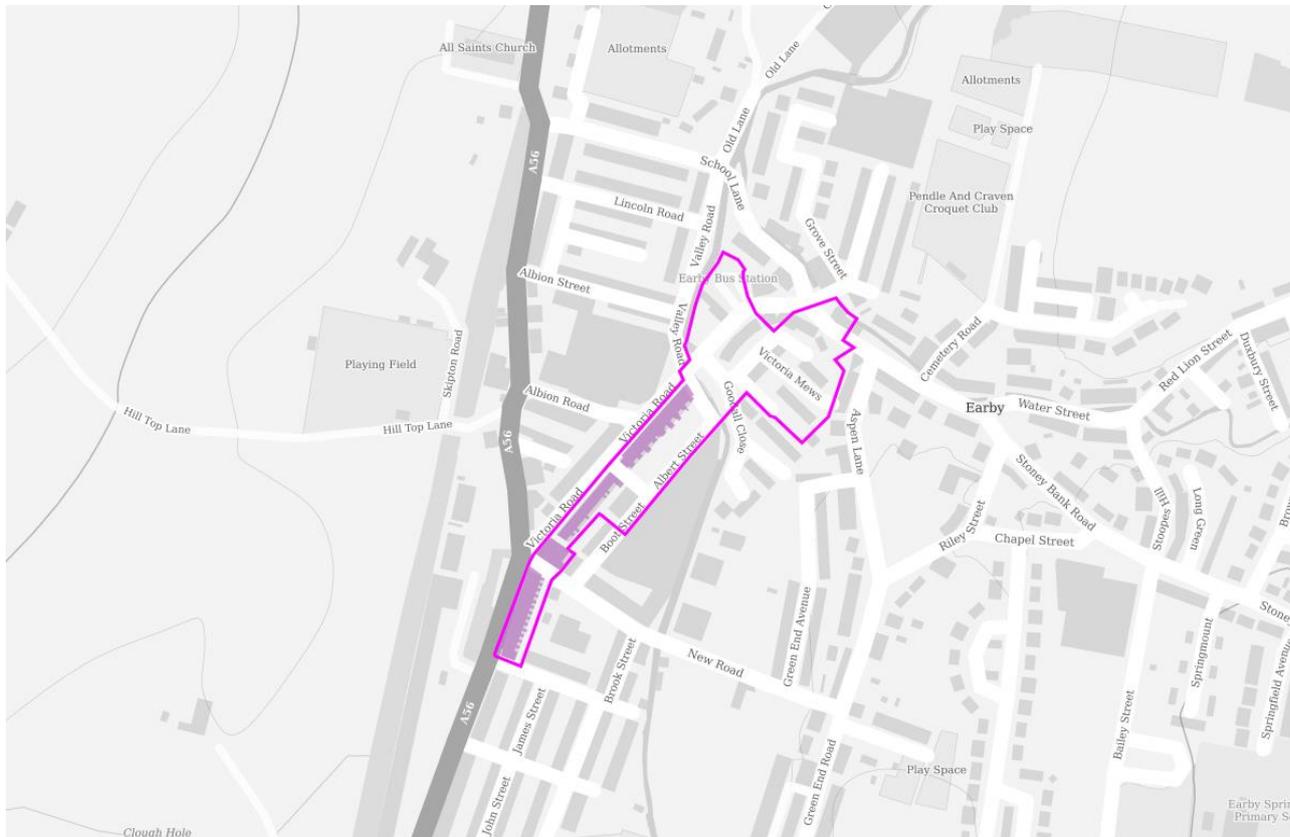
Respondents were asked if they had used shops and services in Barrowford in the last year. Nearly 27% of respondents in the study area had visited Barrowford, which was the third highest figure in Borough after Colne and Nelson. Of those who had used shops/services in Barrowford, respondents were asked what they like about the centre and what improvements would make them visit more often. Only 9% said there was nothing they like about Barrowford.

The other main factors and improvements mentioned (5% of respondents or more) were:

- **factors liked:** good range of independent shops (24%); attractive/nice environment (19%); good cafés/restaurants (14%); close to home (13%); good range of non-food shops generally (13%); nice/friendly atmosphere (12%); and good layout/compact (5%). familiarity/know where everything is (5%).
- **improvements mentioned:** more car parking spaces (11%).

Barrowford generally had high levels of satisfaction and lower levels of dissatisfaction.

Earby Local Shopping Centre



Earby Local Shopping Centre has 41 retail and service units and is the smallest centre in terms of the number of units in the Borough. The mix of uses is set out in Table E1, which is compared with the Pendle and UK averages. More detailed breakdowns of comparison goods retail and non-retail services are shown in Table E2 and E3. Unlike the other Local Shopping Centres, Earby has a relatively high proportion of comparison good shops. There is also a relatively high proportion of convenience goods shops.

Table E1 - Mix of shop and service uses – Earby

Type	Number units	% units	Pendle average	UK average
Comparison goods retail	14	34.1	27.9	29.0
Convenience goods retail	9	22.0	10.5	9.7
Financial/professional services	1	2.4	9.8	9.0
Restaurants/café	3	7.3	6.1	10.0
Pubs/bars	1	2.4	3.3	4.9
Hot food takeaways	3	7.3	7.0	6.2
Other non-retail services	2	4.9	17.9	16.5
Vacant	8	19.5	17.6	14.7
Total	41	100.0	100.0	100.0

Source: Pendle land use survey 2022 and Experian Goad Plan national averages.

The centre has a particularly low proportion of other non-retail services. The shop vacancy rate (19.5%) is the second highest in Pendle and significantly higher than the UK average. Earby has 14 comparison goods shops. The range and choice of comparison shops is limited with only 7 of the 14 Goad Plan shop categories represented, as shown in Table BAR2.

Table E2 - Mix of comparison goods uses – Earby

Type	Number units	% units	Pendle average	UK average
Clothing and footwear	1	7.1	15.5	21.5
Furniture, carpets and textiles	3	21.4	12.0	7.6
Books, arts, cards and stationers	1	7.1	4.5	7.7
Electrical, music and photography	0	0.0	11.5	9.1
DIY, hardware and homeware	3	21.4	10.5	6.6
China, glass and gifts	0	0.0	4.5	5.3
Cars, motorcycles and accessories	0	0.0	0.0	1.3
Chemists, drug stores and opticians	1	7.1	9.5	11.7
Variety, department and catalogue	0	0.0	1.5	1.8
Florists, nurserymen and seedsmen	1	7.1	2.5	2.2
Toys, hobby, cycle and sports	0	0.0	5.5	5.3
Jewellers	0	0.0	5.0	5.0
Charity and second-hand shops	3	21.4	8.5	9.9
Other comparison good retailers	1	7.1	9.0	5.0
Total	14	100.0	100.0	100.0

Source: Pendle land use survey 2022 and Experian Goad Plan national averages.

Table E3 - Mix of service uses – Earby

Type	Number Units	% units	Pendle average	UK average
Restaurants/cafés	3	33.3	17.2	23.8
Fast food/takeaways	3	33.3	19.5	14.7
Pubs/bars	1	11.1	9.4	11.7
Banks/other financial services	1	11.1	6.3	8.6
Betting shops/casinos/amusement	0	0.0	2.3	3.8
Estate agents/valuers	0	0.0	5.9	7.9
Travel agents	0	0.0	3.1	1.7
Hairdressers/beauty parlours	1	11.1	33.6	26.1
Launderettes/dry cleaners	0	0.0	2.7	1.7
Sub-total	9	100.0	100.0	100.0
Other	1			
Total	10			

Source: Pendle land use survey 2022 and Experian Goad Plan national averages.

The centre has only 10 non-retail services as shown in Table E3, which is the lowest provision in the three Local Shopping Centres. Most of these facilities are food/beverage outlets and there is a limited range of other facilities.

Catchment area and market share

The household survey results indicate only 8% of respondents across the study area had visited shops, services or leisure facilities at Earby in the last 12 months, the lowest percentage for the six main centres in the Borough. Earby attracts most of these customers from its local area (Zone 5 – Barnoldswick/Earby), indicating the centre primarily serves the northeast part of the Borough. No respondents indicated they do most of their non-food shopping in Earby. The retail capacity analysis suggests Earby attracts only 0.4% of comparison goods expenditure within the study area.

The combined base year turnover of Earby is estimated to be £9.27 million, the lowest turnover in Pendle. This turnover is split £3.52 million for convenience retail goods, £1.32 million for comparison retail goods and £4.43 million for food/beverage.

Shop rental levels

According to the VOA, Zone A retail rents do not vary significantly throughout the centre. Along Victoria Road Zone A retail rents are £110 per sq.m. The town centre has the lowest prime retail rental levels of the main centres in the Borough. Within the peripheral shopping streets Zone A retail rents are £90 per sq.m.

Public car parks and accessibility

Within Zone 5 – Barnoldswick and Earby 88% of households do their main food shopping by car and 81% do their non-food-shopping by car, which is higher than the Borough averages of 82% and 74% respectively. The availability of free car parking spaces is important in Earby.

Earby has two public car parks with 62 spaces.

In the household survey no respondents mentioned car parking as a positive aspect of Earby, but only 1% indicated more car parking would encourage them to visit the centre more often.

Environment and street cleanliness

In the household survey a limited number of respondents mentioned the environment and street cleanliness as positive aspects of Earby, but only 1% indicated an improved environment would encourage them to visit the centre more often.

Levels of Crime

There were 306 crimes reported in Earby in the year to September 2022, indicating a crime rate of 68 crimes per 1,000 people. This is much lower than the Pendle Borough crime rate of 113 crimes per 1,000 people over the same period and is the second lowest rate of crime of the towns assessed in this study.

Customer views

Respondents were asked if they had used shops and services in Earby in the last year. Less than 8% of respondents in the study area had visited Earby, which was the lowest figure in Borough. Of those who had used shops/services in Earby, respondents were asked what they like about the town centre and what improvements would make them visit more often. The main factor liked in Earby was 40%

mentioning that it was close to home. However, nearly 239% said there was nothing they like about Earby.

The other main factors and improvements mentioned (5% of respondents or more) were:

- **factors liked:** good layout/compact (9%); good range of independent shops (6%); clean/well maintained streets (6%); and nice/friendly atmosphere (5%).
- **improvements mentioned:** more/better non-food shops (26%); more food supermarkets (11%); more independent shops (10%); and better maintained pavements (7%).

Overall there were mixed levels of satisfaction and dissatisfaction in Earby.

Celebrating
60
years

Birmingham
0121 713 1530
birmingham@lichfields.uk

Edinburgh
0131 285 0670
edinburgh@lichfields.uk

Manchester
0161 837 6130
manchester@lichfields.uk

Bristol
0117 403 1980
bristol@lichfields.uk

Leeds
0113 397 1397
leeds@lichfields.uk

Newcastle
0191 261 5685
newcastle@lichfields.uk

Cardiff
029 2043 5880
cardiff@lichfields.uk

London
020 7837 4477
london@lichfields.uk

Thames Valley
0118 334 1920
thamesvalley@lichfields.uk

 @LichfieldsUK

lichfields.uk