PRESTON TOWN CENTRE ANALYSIS

PRECIS DOCUMENT

CONTENTS

1 PREFACE

Early in the year 2000 Grosvenor and Preston Borough Council commissioned the production of an analytical study of Preston Town Centre.

The study was carried out by Healey and Baker (Planning and Retail) EDAW (Urban Regeneration and Design) and Symonds (Transportation) and was completed in November 2000.

The report is a public document running to over 200 pages and contains in excess of 100,000 words of text along with numerous tables and maps.

The size of this document prohibits its general distribution to the public and it has therefore been necessary to issue this condensed report which summarises the findings of the main document. The main document will, however, be available for inspection at Preston Borough Council offices on Lancaster Road, while the summary document will be available on Preston Borough Council's website at www.preston.gov.uk

Using the findings of the Analysis, Preston Borough Council will produce Supplementary Planning Guidance for appropriate areas of the town centre with a view to facilitating comprehensive redevelopment and regeneration of the town centre.

2 INTRODUCTION

2.1 BACKGROUND

2.1.1 Preston Borough Council held a “Town Centre Initiative” conference in 1998 at which it was agreed that the town needed to reposition itself in the regional shopping hierarchy in order to halt long term decline, to secure prosperity and to improve the urban environment.

2.1.2 Grosvenor approached the Council offering to take up the challenge, to commit resources to work with the Authority to determine what is necessary and to assess the potential for development.

2.1.3 In November 1999 the parties signed a Statement of Intent, which set out the basis for co-operation; and a timetable. A Statement of Aims and Objectives was agreed; as included in this document. Thereafter, Grosvenor were required to produce a Report assessing development potential.

2.1.4 This Report determines what is needed to secure Preston’s long term role as a key sub regional centre in the region’s shopping hierarchy. There is an economic overview of the town and of the retail market generally against which potential development options are assessed. There is also an assessment of planning policy; an audit of the existing urban fabric; a transport assessment; an expenditure and capacity analysis; an assessment of retailer and leisure occupier demand; and a strengths, weaknesses, opportunities and threats analysis. Conclusions are drawn about the scale and nature of the development that is commended to help achieve the Aims and Objectives. Finally, sites designated for development in the current Local Plan and other opportunities are considered to determine whether they are capable of accommodating the development to achieve these aims and objectives.

Tithebarn Project Proposed Town Centre Redevelopment – Joint Aims and Objectives (December 1999)

AIMS	OBJECTIVES	SPECIFIC FEATURES SOUGHT
1. To enhance the vitality and viability of the town centre as a whole by achieving a comprehensive, mixed use, redevelopment which is fully integrated with the existing town centre and which extends the range of facilities on offer. (See DPLP 3/9)	To achieve: • A unique development which elevates Preston's position to number 3 in the regions town centre hierarchy. • A development which complements and extends the range of existing facilities. • A development which is clearly based on a "people based", mixed use approach to urban design. • A development which complements the existing elements of the historic fabric of Preston which should be retained and incorporated.	• New high quality shopping facilities including support facilities e.g. shoppers crèche. • A range of new, exciting leisure/food/drink uses. • Replacement, where demand exists, of any office floorspace lost through redevelopment by high quality accommodation in appropriate locations in the Borough. • Facilities for the development of media/arts/cultural business. • An appropriate range of town centre housing. • A network of linked public spaces, which can be used for a range of activities. • The incorporation of appropriate weather protection to all pedestrian routes.
2. To improve the safety, accessibility and sustainability of the whole town centre by rationalising and improving the transportation infrastructure.	To achieve: • A development which maximises accessibility for all sectors of the population to the whole town centre by a variety of means of transport. • The rationalisation and improvement of the road network within the area but giving careful consideration of the wider traffic impacts on the town centre. • A development which facilitates improvements to and the rationalisation of existing public transport and allows the possibility for new and innovative methods of moving people within the town centre. • A development which allows service deliveries which do not impinge on any areas of public space during the busiest times of the day.	• New facilities for the inter-change of local and inter city public transport at the edge of the town centre. • Public transport routes within the town centre which link the east and west, particularly the railway station. • A peripheral road network which restricts penetration to the redevelopment area to essential service vehicles. • The type of car parking provision will be subject to the financial assessment of the development and the number of spaces will be subject to transportation studies/policies. • The widespread extension of pedestrianisation with full disabled access within the external and internal environments of the scheme. • The provision of safe cycling routes throughout the scheme, networked and extended to existing routes. • A network of appropriate facilities for essential service deliveries separated from the routes and spaces used by the public.

	• A development which reduces the overall provision of long stay car parking in the town centre but makes provision for short stay visits.	• Design in community safety features e.g. CCTV.
3. To maximise the spin-off benefits of redevelopment on the adjoining deprived areas of urban Preston.	• To encourage investment in adjoining areas by linking with regeneration initiatives e.g. SRB 3/6. • To provide job opportunities for local people. • To provide opportunities for training.	• Redevelopment of key sites in Inner Preston Regeneration Area. • Use of local firms in the construction phases is to be explored and encouraged. • Employment of the local/adjacent work-force in the completed scheme is to be planned and targeted. • Encourage welfare to work initiatives. • New businesses to demonstrate a tangible commitment to targeted training. • Development partners to be represented on SRB Partnership board. • Development partners to actively pursue schemes for regeneration.
4. Consideration to be given by the developer of the viability of retention, regeneration and relocation of certain Council operational assets.	• To produce options to achieve the incorporation of those appropriate operational assets into the redevelopment scheme.	• Replacement of bus station by appropriate, integrated facilities. • Replacement for any public car parking lost by the appropriate number of car parking spaces determined by the transportation studies. • Refurbishment or replacement and relocation of indoor market. • Regeneration of outdoor markets. • Replacement of any Council offices affected is to be need-based – the location of such offices being subject to further studies. • Advice Centre. • Improved community information facilities. • Library Replacement. • Improve access linkages including a covered link from the Guild Hall to car parking within the redevelopment and improvements to enhance the visual appearance and facilities of the adjacent Guild Hall.

3 ASSESSMENT

3.1 SWOT ANALYSIS

Introduction

3.1.1 A large part of the report is analytical and factual. This section reviews the various issues and attempts to show how they inter-link to determine future strategy.

3.1.2 This is a traditional SWOT Analysis, setting out the strengths, weaknesses, opportunities and threats associated with the town centre. The analysis is necessarily wide ranging, but provides an overview of the town centre in the context of its role and function. The table below provides a summary of the analysis.

SWOT Analysis Summary

Strengths	Weaknesses
• Lack of immediately close competing town centres/retail facilities	• Perception of town centre offer is inferior to Manchester Trafford Centre.
• Accessibility to and from hinterland and wider region	• Poor pedestrian environment and perception of safety and crime
• More than just a retail location; focus for administrative and educational functions	• Lack of high order fashion and lifestyle retailers
• Strong architectural heritage	• Lack of leisure facilities, especially a town centre cinema, branded restaurants and wine bars and poor hotel provision
• Young catchment profile	• Above average amount of inefficient , poorly configured unit shops
	• Anchor stores located too close together limits spread of pedestrian flow for town centre retailers as a whole.

Opportunities	Constraints
• Alter perception of potential catchment and clawback trade from competing centres	• Not responding to advances made in other town centres and losing further trade and profile
• Take advantage of growth in retail expenditure and retailer demand for space to secure new development	• Losing retailers who want to locate in Preston but cannot, so locate in competing centres
• Revitalise through regeneration of town centre	• A spiral of decline and lack of investment culminating in reduction in role, function and profile of town centre in region and beyond.

Strengths

Location

3.1.3 Preston is particularly well served by the motorway network. The M6 connects the town to the north via Lancaster and to the south via Skelmersdale and Wigan. The M55 connects Preston to Blackpool and the M61 connects Preston to Bolton and Manchester. The M65 gives access from Preston to Blackburn. In the immediate vicinity, there are a number of ‘A’ and ‘B’ classified roads which connect Preston to its immediate hinterland.

Public Transport

3.1.4 Preston is also one of the principal stops on the West Coast mainline railway. The Virgin West Coast operates services to London and Glasgow from Preston with travel times of approximately 2 hours 30 minutes. Preston railway station is the hub of the Lancashire railway network providing good connections to stations throughout Lancashire. These include Blackpool, Morecambe, Lancaster, Heysham, Clitheroe, Blackburn, Accrington, Burnley, Nelson, Colne, Chorley, Leyland, Ormskirk, Carnforth, Euxton and Lytham St. Anne’s.

3.1.5 Preston is within easy reach of Manchester Airport and close to Blackpool Airport.

3.1.6 Preston has a very good bus network with over 3,000 buses entering or leaving the main bus station on a weekday (see section 5.3 i).

3.1.7 The town centre is well connected into this transport network. With mainline railway and bus stations, together with dual carriageway links to the motorway network, it is one of the most accessible town centres within the region.

Traffic

3.1.8 Apart from the commuter peaks, when some congestion is experienced on the major arterial routes into the town, Preston has a relatively congestion-free road network.

Status

3.1.9 Preston is a large centre in Lancashire and occupies a high order position in the retail hierarchy of the region as a key sub-regional centre. This status is conferred to it by regional policy, and is the basis upon which the Structure and Local Plan policies have been framed.

Administrative Centre

3.1.10 Preston is one of the principal administrative centres in the region. It accommodates Lancashire County Council and the Crown Courts, together with a number of other important civic responsibilities.

Catchment

3.1.11 Due to the excellent transport links, the town centre has the ability to have influence over a significant natural catchment area. Given its sub-regional status, and the number of lower order centres within the region, a good proportion of the catchment should be capable of being attracted to Preston. The profile of this catchment identifies a higher than average proportion of population under the age of 25 and lower than national average proportion of population of 65+ years.

3.1.12 The catchment population of Preston is relatively affluent and growing and has an above average car ownership level.

Economy

3.1.13 Preston's employment base has evolved from being primarily manufacturing to become one of the principal service sector employment centres of Lancashire. There are a number of high-tech companies such as British Aerospace, with significant investment programmes running in the region. The local economy is improving with a low unemployment level.

3.1.14 Preston's economy is orientated towards large firms with over a quarter in employment provided by organisations with more than 500 people. The administrative role associated with Preston, referred to above, also helps to underpin the local economy.

University

3.1.15 Preston has a centrally located university which is expanding and currently has 22,000 students. This provides an impetus within the local economy and provides a significant research resource and a continuing skills base.

Urban Design

3.1.16 Preston exhibits a strong built form at its centre relating to the historic structure of the town particularly around the Flag Market/Market Square and Winckley Square. A number of important listed buildings are located in the town centre, many with a civic function, which provide a unique asset to the town.

3.1.17 There are a number of strong and interesting view corridors in the town centre, e.g. Friargate to Flag Market/Market Square, and the views of the Covered Markets.

Markets

3.1.18 The Market Hall and the Covered Market have long been an attraction of Preston town centre, allowing the centre to draw widely from custom throughout the region.

Residential Areas

3.1.19 The town centre has a number of adjacent residential areas that can be accessed easily by foot from the town centre and vice versa.

Retailing

3.1.20 Preston has a number of large retail stores e.g. Debenhams, Marks and Spencer, Woolworth's, Boots, T.K. Maxx and T. J. Hughes. It has the largest department store in Lancashire and the best range of fashion multiples in Lancashire.

3.1.21 Preston is sufficiently far from competing major regional centres, (e.g. Manchester and Trafford, to establish itself as a strong independent attractive retail and leisure destination).

Crime & Safety

3.1.22 There are a number of policies and programmes in place to deal with crime issues, particularly drug abuse (including the Preston Community Safety Strategy). The main shopping streets are covered by a CCTV system which was installed in 1998 and proposals for town centre management are being advanced. The problems that need to be tackled have been identified.

Weaknesses

Catchment Area Influence

3.1.23 While Preston town centre is the largest centre in Lancashire and is identified in regional planning guidance as performing a key sub-regional role, it is apparent from the work that Healey & Baker has undertaken, reviewing the catchment area, that the centre currently has only a limited influence over the potential catchment area as a whole. Indeed, Preston town centre's influence is particularly limited to Preston's urban area and the adjoining hinterland. This extends west towards Blackpool, north approaching Lancaster, east to a mid-point with Clitheroe and Blackburn and to the south it would incorporate Chorley but not much further beyond.

3.1.24 Outside this area, Preston's current influence is judged, having regard to the gravity models assessed, as largely insignificant.

3.1.25 Given the status of the centre, its excellent road, rail and bus links, it should be anticipated that the centre would have a much greater influence over the identified study area. For instance, centres of population to the north such as Kendal and Lancaster should turn to Preston as the next higher order centre that could serve their needs. In practice, it appears that residents are more likely to turn to the Trafford Centre or Manchester City Centre itself, negating the role and function of Preston town centre. To the east, it appears that residents see no discernible difference between Preston town centre and the other lower order centres such as Blackburn and Accrington. To the south-east, the role of Bolton is comparable and the enhanced function of Wigan, together with the significant influence of Manchester City Centre and the Trafford Centre itself, limit Preston's influence.

Environment

3.1.26 Whilst Preston has a number of attractive features, there is generally a poor pedestrian environment, particularly in some areas around the bus station which also creates a physical barrier to the east of the town centre. The pedestrian routes to the north of the town centre and adjacent residential areas are unattractive and indirect due to the Ringway and bus station.

3.1.27 Some infill development schemes have poor relationships to adjacent listed buildings and the built form of the town centre e.g. the Guild Hall, Crystal House and the Market Hall. The town centre generally has limited areas of open space to allow for interaction, recreational and rest periods. Much of the built form, particularly on the eastern and northern edge of the principal retail area is lacking in human scale and visually over-bearing.

Lacks Cohesion

3.1.28 Preston is in large part an elongated linear centre. Key stores are tightly grouped together, as opposed to a broad spread of anchors among the main retail streets which would help strengthen the town centre. This has the effect of restricting the prime retail area and accentuating the secondary and tertiary retail areas. The St. George's Shopping Centre and Fishergate Centre are not well anchored.

Unit Size & Configuration

3.1.29 The town centre has a poor unit shop configuration and much of the existing built form is not judged to meet modern multiple occupier requirements in terms of size, configuration and location.

Limited Retail Provision

3.1.30 The town centre suffers from a limited amount of good quality fashion retailing and lifestyle retailing, particularly national and international branded sectors, even though it provides facilities better than other centres in Lancashire. The centre has no full line department store and poor household goods and furniture representation.

Limited Modern Office Accommodation

3.1.31 The existing supply of office space in the town centre, whilst plentiful, is generally of a poor quality and there is insufficient supply of modern, efficient business space.

Car Parking

3.1.32 Whilst there is, at face value, adequate parking provision to meet current usage, much of the provision: is unattractive; not well related to the principal retail circuit; in need of significant refurbishment/repair and not conducive to encouraging repeat visitation, particularly from beyond the immediate catchment.

Existing Schemes

3.1.33 The previous redevelopment schemes have proved too small to provide the critical mass to positively influence the catchment area in securing Preston's role as a sub regional centre. This is exemplified by the experience of the Fishergate Centre.

Bus Station

3.1.34 The bus station has very poor pedestrian linkages is over large and a physical barrier to pedestrian movement. There are no 'at grade' linkages and the subways are of poor quality and unattractive. The bus station is some distance away from the primary activity areas of the town such as Fishergate and both the St. George's Shopping Centre and the Fishergate Centre.

3.1.35 Buses arriving and leaving the bus station have very low bus occupancy rates indicating that passengers alight and board elsewhere in the town centre. The bus station car park similarly suffers from the poor pedestrian linkages.

Pedestrianisation

3.1.36 Only part of the town centre is currently pedestrianised and in particular Fishergate is not fully pedestrianised.

Crime & Safety

3.1.37 The incidence of crime, particularly disorderly behaviour, specifically related to alcohol (focuses on Church Street), car crime and theft from shops is relatively high in the town centre, compared with the rest of the town. The town centre is often perceived, particularly in the evenings at weekends, as being a little unsafe for families and older age groups.

Preston Town Centre East

3.1.38 Unlike other parts of Preston town centre, the transition to the east, between the town centre and the commercial and residential areas beyond is weak. This reflects the significant areas of under-utilised land in this area, including the bus station and car park, together with vacant office buildings and piecemeal and poorly configured retail developments.

Leisure Offer

3.1.39 Preston town centre provides only a limited level of leisure facilities not commensurate with the centre's intended role. Pubs, restaurants and cafes are becoming more prevalent, but for a centre of this size, the circuit could be extended. In addition, however, large-scale anchor leisure uses such as cinemas, health and fitness clubs and other entertainment facilities are largely absent from the town centre. This depresses vitality and viability and reduces the propensity for linked trips with existing town centre facilities.

Hotel Provision

3.1.40 Preston town centre is under-provided with hotel rooms, particularly towards the business end of the market, with only the Forte Posthouse immediately adjacent to the town centre. This affects the perception of the town centre for business and tourism.

Opportunities

To Reassert the Sub-Regional Status of Preston

3.1.41 Preston town centre should take the opportunity to re-assert its sub-regional status as the dominant centre, to the north of Manchester. There is a clear gap in the area for a centre of this nature, which several areas of population would turn to for a closer, quality, alternative to Manchester and the Trafford Centre. This can only be achieved by significantly enhancing the attraction of Preston to its perceived catchment area, and hence the influence over that catchment area the centre would assert.

Capacity

3.1.42 Significant opportunity exists in Preston's natural catchment area to facilitate further growth in the town centre. This capacity exists as a consequence of growth in expenditure in Preston itself; footloose retail expenditure growth from throughout the region; and clawback of expenditure that is currently leaking out of the town and its catchment area to other places.

Retailing

3.1.43 The opportunity exists to extend the currently constrained retail pitch and improve shopper circulation throughout the town by extending the retailing and the location of key anchor/multiples. The opportunity also exists to accommodate at least one new department store within the town centre. A number of department stores have requirements in this area. The benefit of accommodating one or more new department stores within the centre is that it would significantly broaden the appeal of the town, increasing market penetration within the catchment area. This in itself would help re-assert the sub-regional function of Preston town centre. It would also attract further quality retailers to the centre.

3.1.44 The opportunity also exists to provide modern retail units of appropriate specification, to satisfy known retailer requirements. In particular, the provision of space for higher order retailers not currently represented in Preston, and the provision of larger units for existing retailers wishing to expand to enhance their product offer but currently prevented from doing so.

3.1.45 There is an opportunity to introduce a broader range of uses and facilities e.g. leisure facilities, arts centre, cultural industries or special events. Such uses will add vitality to the whole town centre and potentially increase the numbers of visitors.

Town Centre Cohesion

3.1.46 The opportunity exists to improve the nature of movement in the town centre by creating a circular shopping route to integrate more effectively the important civic buildings and heritage function in the heart of the town centre.

Urban Design

3.1.47 An opportunity exists to meet the demand for further floorspace through the creation of a high quality scheme in the town centre, which integrates and enhances existing streetscape. This could bring existing buildings back into positive or more intensive use and create active public spaces, encouraging the re-use of adjoining buildings.

Commercial Activity

3.1.48 Increased cohesion and an improved environment could provide the catalyst to draw daytime commercial activities back into the town centre. The opportunity may arise to engender employment generation; broadening the range of uses in the town centre and generating additional expenditure and overall positive profile for the town.

Crime & Safety

3.1.49 An opportunity exists to meet the needs of young people, and to create facilities which will minimise issues of disorder and nuisance and build upon the large number of people visiting the town centre in the evening. This could encourage a wider range of people to visit the town centre in the evening and at weekends. It is also an opportunity to provide attractions which extend the active hours within the town centre, encouraging more people to extend visits and link trips.

3.1.50 There is an opportunity to address issues of crime and safety through the mix of uses and the detailed issues of lighting, visibility and an extension of the CCTV system.

3.1.51 The creation of economic and physical linkages between the town centre and adjacent areas would help to improve opportunities for residents and enliven run-down parts of the centre.

Preston Town Centre East

3.1.52 The significant area of under-utilised land to the east of Preston town centre offers an opportunity to meet some of the needs of Preston residents. The area has development potential and is of a sufficient size to be able to encourage a strong design and streetscape identity, the creation of radical environmental improvements and provide an enhanced focus for differing town centre facilities.

Bus Station

3.1.53 The facility requires a major rationalisation and enhancement programme, which would enable better pedestrian linkages and mobility access improvements. The development of the Preston town centre east area would draw the bus station more closely into the effective town centre, thus promoting its use significantly.

3.1.54 Relocating part of the bus station activity to a site near the current railway station could also provide good links into the town centre and also promote public transport integration.

Guild Hall

3.1.55 Opportunities exist as part of enhancements to Preston town centre, to improve the function and facilities of the Guild Hall as both a major mixed use building and a civic amenity for residents.

Economic Regeneration

3.1.56 Opportunities exist to complement the regeneration efforts being undertaken through the Single Regeneration Budget and other programmes with long term employment creation in the town centre. An important aspect will be the encouragement of local employment measures and training schemes, which enable local residents to gain access to the jobs created by any development. Such initiatives could help tackle social exclusion.

Threats

Competing Facilities

3.1.57 The principal threat to Preston's continuing health is competition from retail facilities elsewhere and failure to secure continued investment. In the case of Preston, this relates to both town centres and out of centre developments throughout the region. A number of centres including Blackpool, Burnley, Bury, Manchester, Southport, Accrington and Chorley have commitments/active proposals for further floorspace, which will serve to enhance the function of those centres. In addition, there are a number of realistic proposals within the region which could enhance the centres at Blackburn, Bolton, Wigan, Trafford and Southport.

3.1.58 Unless Preston positively plans to secure its share of the region's investment, these other centres will enhance their facilities at the expense of Preston town centre.

Further Deterioration of Sub-Regional Status

3.1.59 It is apparent that Preston has already lost some of its status, within the region, as other centres have become more important. Historically, Preston was ranked behind Manchester and Liverpool within the North West region; now Chester, the Trafford Centre and arguably Bolton are all ranked as superior retail facilities at least in qualitative terms.

3.1.60 Failure to facilitate opportunities in Preston will inevitably lead to investment being secured by competing centres.

3.1.61 The diminution of the retail status of the centre, has fundamental repercussions for the town as a whole. The town centre is the core of activity within a town, and its strength is a springboard for the policies of the local area. It can send a message of confidence to the business community and to retailers and leisure operators who may wish to locate there.

3.1.62 If local and regional policies are predicated on a strong town centre, capable of allowing for growth within the region, it is critical that the town centre meets that expectation. If Preston town centre does not meet the aspirations, there is a significant threat to the overall policy approach in the area which has pursued expansion in economic activity, housing, recreation and the arts.

Urban Design

3.1.63 Preston town centre should not miss the opportunity to reinvigorate its historic and civic core and to enhance its attractions to improve the town's long term competitiveness. If it relies upon ad hoc, incremental solutions or neglects it, the downward trend will continue, potentially reducing investment in the historic fabric of the centre as a whole.

Evening Economy

3.1.64 Failure to diversify the range of uses and to draw a wider range of visitors in the evenings will undermine the image of Preston town centre and the perception of the centre as a whole. Over time this will reduce the attractiveness of the centre to residents and visitors.

Crime & Safety

3.1.65 The over dominance of the youth culture attractions in the evening will continue to impact upon the image of the town centre and hinder investment and evening activity.

Preston Town Centre East

3.1.66 Failure to act to resolve the significant complexities of this part of the town centre in a comprehensive and integrated manner, is likely to perpetuate the long term under-utilisation of the area. This could have a significant dampening effect on the overall attraction of Preston town centre.

Bus Station

3.1.67 Failure to improve the current arrangement will result in the bus station and its car park remaining under-utilised and a significant drain on public resources.

SWOT Analysis Conclusions

3.1.68 Preston has a considerable number of attributes which add to its attraction across a potentially significant catchment. Its natural status within the Country and the Region underline the importance of the centre. However, the town centre does not currently perform its sub-regional role to its full potential. Indeed, in terms of retailing, a number of other centres within the region have advanced considerably, some to the detriment of Preston. As a result, Preston offers little discernible differential offer for people within the study area wishing to shop or visit leisure attractions.

3.1.69 To rediscover the wider role of the town centre remains a significant prospect. Preston is most appropriately placed to secure such investment, but it will not be realised without a co-ordinated and proactive involvement of the public sector agencies and the private investment community.

3.1.70 Preston is an important historical and geographical centre. It is also a strategically important centre in planning policy guidance terms. It has a large growing catchment population. It is centrally located within the Lancashire catchment area and should be able to benefit from retail market polarisation if positively planned for. As a consequence of Preston's historical importance, the town centre retail offer is extensive, benefiting from a number of key stores, a wide range of national multiple retailers, a strong financial services base and a wide range of independent retailers. It has a good base upon which to build an enhanced successful function in the emerging "experience economy".

3.1.71 In our opinion, Preston is not adequately fulfilling a key sub-regional role, in terms of its retail and leisure offer. The town is significantly under performing in key sectors of the market including high quality up market fashion retail, household and furniture retail, and the leisure entertainment offer.

3.1.72 To a large extent the town's position is under threat because the existing retail provision is in inadequate accommodation, poorly located and poorly configured to engender shoppers' circulation. A significant proportion of the town's retail floorspace consists of independent retailers. The centre's retail provision is largely reliant upon a relatively small, constrained prime pitch. In addition, whilst there is good accessibility for car borne shoppers to the town centre, much of the car parking is unattractive and in peripheral locations with poor pedestrian linkages, which discourages the prospective shopper.

3.1.73 The centre's retail offer does not sufficiently differentiate itself from other competing centres coupled with limited additional attractions and draws. The town centre is therefore not responding to the key market trends likely to influence the future role and function of centres within the region.

3.1.74 However, Preston is an important town within the region's retail hierarchy. Its role is underpinned by a generally good transport infrastructure and benefits from a strong local economy. Preston's catchment population is growing and over the course of the next decade the employment age groups are set to increase. Preston's geographical position, being centrally located in Lancashire, and the surrounding catchment offers significant opportunity to encourage further investment.

3.1.75 The town has witnessed its role and influence decline. This partly reflects limited investment within the centre over the last decade, significant growth in off-centre provision and enhancement of surrounding competing centres. Whilst the centre remains relatively buoyant, there are some key structural weaknesses that are anticipated to significantly impact upon its performance over the next decade in the absence of strategic investment and policy initiatives.

3.1.76 Some of the key threats for Preston relate to the significant provision of independent retail outlets in small, inadequate off-pitch premises that will continue to decline to the detriment of the town centre as a whole. Prime retail stock is severely restricted and the prospects of extending existing prime are substantially constrained, with the result that latent demand and known retail requirements cannot be easily satisfied within the town. These requirements may, consequently, be diverted to other centres that are advancing investment proposals. The lack of readily available and viable sites in proximity to the prime pitch in Preston means that the private sector on its own will be unable to respond adequately to this challenge, potentially resulting in the gradual decline in influence of the centre. A comprehensive solution derived from active partnership between the public and private sector is likely to represent Preston's best possible solution to these issues.

3.1.77 Key retailers are focused on only a limited number of centres. The failure to provide appropriate accommodation for these key retailers could have significant detrimental effects on Preston's performance in the longer term. The high degree of accessibility and attractive car parking at existing off-centre retail and leisure facilities is likely to further erode market share from Preston town centre in the absence of a concerted strategy to assist the town centre in competing effectively with this off-centre provision.

4 CONCLUSION

4.1 POLICY

4.1.1 Policy Analysis confirms the broad acceptance of the principle of securing significant new retail and mixed use development within Preston town centre. Such development would meet the broad objectives of national, regional and local planning policy.

4.1.2 Consultants are of the opinion that there could be no sustainable hierarchy or impact objection to a scheme in Preston town centre; and that the environmental, economic, competitive and innovative consequences of such investment, sustaining the long term future of the town, are all considerations which respond positively to policy.

4.2 MARKET ANALYSIS

4.2.1 The analysis has had regard to the local and national economy, national consumer, retail and investment trends, demographics, retail development activity in the region and market demand.

4.2.2 It confirms the potential to secure a major retail driven development in Preston, reflecting the town's strong, improving and diversifying local economy, anchor store requirements, significant levels of supporting retail occupier demand, the town's strategic location and good accessibility by a wide range of transportation modes, coupled with the town's prospects to benefit from the trends of market polarisation.

4.3 CAPACITY ANALYSIS

4.3.1 Healey & Baker have considered comparison retail capacity in various ways, including maintaining market share, the effects of polarisation and scenarios of qualitative improvements in provision.

4.3.2 The study of retail capacity shows that by bringing forward a scheme of 48,000-53,750 sq.m (516,500-578,400 sq.ft) of net additional comparison floor space, Preston town centre could secure about £641.7 million or 13.2% of expenditure associated with the study area at 2006 (see Table 7.31 of the full document).

4.3.3 This would be an increase over the predicted actual expenditure attracted to Preston town centre without securing major new development at 2006 of £313.2 million or 95%.

4.3.4 In terms of where this expenditure is likely to come from, of the £313.2 million, £55.1 million would be accounted for as the capacity associated with Preston town centre itself if the existing year 2000 market share was to be maintained at 2006. This leaves £258.1 million to be secured from growth associated with other retail facilities (both town centres and out of centre retail parks) within the study area and/or impact on those facilities.

4.3.5 Healey & Baker consider that £112 million of the £258.1 million would come from the growth associated with the identified principal town centres. The remaining £146.1 million would therefore come from the £355.5 million worth of growth associated with unidentified town centres and out of centre retail facilities located within the study area.

4.3.6 If total growth associated with the study area between 2000-2006 equates to £664.4 million, taking into account commitments and growth in floorspace efficiency at 1% per annum, after removing expenditure associated with the Preston scheme, this would still leave £350 million of available expenditure to support further retail development throughout the study area in the period to 2006. Healey & Baker advise that whilst development in Preston on the scale envisaged would impact, to an extent, on other centres, that impact is not judged to be at a level that could be considered detrimental to their long-term vitality and viability.

4.4 CRITICAL MASS

4.4.1 We judge a scheme in Preston that would achieve the necessary qualitative improvements should have a critical mass in the range of 46,500 sq.m to 76,000 sq.m (500,000 sq.ft to 825,000 sq.ft) gross, combining both retail (comparison and convenience) and leisure floorspace, supported by circa 2,500 car parking spaces.

4.4.2 Such broad targets would enable sufficient flexibility to respond to the evolving market during the development period and provide the flexibility upon which to undertake more detailed site specific scheme assessment.

4.4.3 These estimates exclude any other uses such as residential, offices or community facilities which could form part of a comprehensive mixed use town centre scheme.

4.5 SCHEME COMPONENTS

4.5.1 Healey & Baker recommend that Preston needs to secure a two department store based scheme in order to provide the qualitative improvement and deliver the critical mass necessary to protect and enhance Preston town centre's position compared to competing facilities and significantly enhance the offer of the centre to the study area population.

4.5.2 The following table gives a broad indication of the component parts as a basis for progressing a detailed scheme design. Detailed design would inevitably lead to variations to reflect specific site constraints and opportunities and the figures must be viewed in this context.

Use	Sq.m Gross	Sq.ft Gross	Sq.m Net	Sq.ft Net
Department Store 1	14,000 – 18,600	150,000 – 200,000	11,200 – 14,880	121,000 – 160,000
Department Store 2	9,300 – 11,600	100,000 – 125,000	7,440 – 9,280	80,000 – 100,000
Comparison Shops	18,300 – 30,000	196,000 – 322,000	14,640 – 24,000	157,000 – 258,000
Total Comparison	**41,600 – 60,200**	446,000 – 647,000	**33,280 – 48,160**	358,000 – 518,000
Convenience Shops	2,000	21,500	1,600	17,200
A2	1,000	11,000	800	8,600
A3	2,000 – 3,500	21,500 – 37,000	1,600 – 2,800	17,200 – 30,000
Commercial Leisure	9,300	100,000	7,440	80,000
TOTALS (rounded)	**56,000 – 76,000**	**600,000 – 825,000**	**45,000 – 61,000**	**485,000 – 655,000**
*Parking Spaces	2,500		2,500	

*combination of new and refurbished parking spaces

4.5.3 Taking into account the market analysis, retail and leisure capacity assessments, critical mass considerations and recommended scheme components, it is recommended to seek to bring forward a two department store led scheme of up to 76,000 sq.m (825,000 sq.ft) gross incorporating leisure anchors and other complementary town centre uses.

4.5.4 In terms of the retail component, this is recommended to extend to about 48,160 sq.m (518,000 sq.ft) net comparison floorspace. Taking into account the need to replace a proportion of existing retail floorspace in the Tithebarn Area to accommodate the new development, the net additional floorspace provision would therefore be about 41,000 sq.m (450,000 sq.ft).

4.6 SEQUENTIAL SITE ANALYSIS

4.6.1 In the sequential analysis section a number of potential development sites, some of which have been identified in the Local Plan, have been assessed to determine their suitability as a location for the scale of development recommended above. This assessment has had regard to: planning policy, accessibility, historical development, site availability, viability and suitability.

4.6.2 All the sites considered, with the exception of the Tithebarn Area, are judged inadequate for a scheme of the envisaged scale and composition.

4.6.3 Healey & Baker consider the most appropriate location for further investigation is the Tithebarn Area. The area exhibits the following potential:

- To sustain and enhance the vitality and viability of Preston town centre;
- Is of a size needed to accommodate the scale of development envisaged to sustain and enhance Preston town centre's role and function as a sub-regional centre;
- It adjoins the Principal Retail Core and has the potential to link well with the town's retail provision and other functions;
- It could create a circuit that would extend the Principal Retail Core integrating the new development with the existing shopping area and broadening the influence of the anchor stores;
- It could maximise the use of this under-utilised area of the town centre and be a stimulus to regenerate the immediate area;
- Has the ability as a location to attract key anchor store traders and retail units, making the scheme commercially viable;
- To accord with Policy S6 of the emerging Preston Borough Local Plan and national and regional planning policy; and
- Represents an opportunity to rationalise and consolidate the town centre's transport provision and strategy to the benefit of the town centre as a whole.

4.7 TRANSPORT

4.7.1 Preston town centre, with its range of shops and other facilities, is extremely accessible by all modes of transport. Apart from access and capacity problems on Saturdays associated with the Fishergate Centre car park, the town centre is relatively free of traffic congestion directly associated with the town centre retail.

4.7.2 There would appear to be ample car parking supply to meet current levels of parking demand. There is a strong preference for parkers to use the surface car parks around the town rather than the poorly located and unattractive multi-storey car parks. Although there is ample supply, Preston does not fair well in terms of parking provision when compared to other towns in the north west region and comparable towns and cities across the country.

4.7.3 Preston is very well served by all forms of public transport, particularly by bus with an abundance of services throughout the day. However, Preston Bus Station is located on the eastern edge of the town centre and suffers from poor pedestrian linkages. It has been observed to be operating below capacity and both major operators acknowledge that there is an opportunity to reduce the size of the bus station in any future development.

4.7.4 Preston is in the process of developing its Park & Ride facilities; one site is currently in operation whilst one is out to tender and others are in the pipeline. The Park & Ride has been introduced in conjunction with a restrictive town centre car park charging regime aimed at reducing the number of long stay parkers.

4.7.5 The railway station is located within a short walking distance of the town centre retail. As well as being one of the principal stops on the west coast mainline, Preston railway station acts as the main hub of the Lancashire rail network.

4.7.6 There is a large residential population within a reasonably short walking distance of the town centre. Also there is a comprehensive cycle network serving Preston, together with cycle parking facilities, making the town centre accessible by bike.

5 SUMMARY

5.1 Preston is an historically and geographically important centre. It has a large catchment population, is centrally located in Lancashire and is able to benefit from retail market polarisation. As a consequence of its historic importance, the town centre's retail offer, benefits from a number of key stores, a wide range of national multiple retailers, a strong financial services base and a wide range of independent retailers. In addition, Preston has a centrally located university with approximately 22,000 students, which provides an impetus to the local economy, a significant research resource and a continuing skill base.

5.2 Preston is a centre for culture, the arts, business, entertainment, education and administration, allowing for multi-purpose trips and the most efficient use of transport and other investment in infrastructure.

5.3 Planning guidance confirms that the continuing vitality and viability of towns such as Preston is important for both economic and social reasons.

5.4 In 1997 the resident population of Preston was estimated at circa 135,000. Within 10 kilometres and 20 kilometres of the town centre, there was circa 267,000 and 642,000 respectively (1994 estimates). The area over which Preston is expected to have an influence as a shopping destination (the 'Study Area') has a population of approximately 2,200,000. It is a relatively affluent sub region and has above average car ownership levels.

5.5 Preston occupies a high order position in the retail hierarchy of the North West region as a key sub-regional centre. This status is conferred to it by adopted regional policy, and is a key basis upon which Structure and Local Plan policies have been framed.

5.6 Preston's status, however, is under threat. Too much of its existing retail provision is in inadequate accommodation, poorly located and poorly configured to encourage shopper's circulation and overly reliant on the independent retail sector. In addition, some of the car parking is unattractive and poorly configured.

5.7 The town's retail offer no longer sufficiently differentiates Preston from competing centres. Additional complementary attractions are limited in part reflecting the shift to off centre locations. The town centre is not responding to key market trends likely to influence the future role and function of the town within the region.

5.8 In Hillier Parker's rankings, Preston has fallen from 37th position in 1961 to 41st, despite some development during the 1980s, whilst other centres have secured greater investment.

5.9 Other assessments with wider qualitative indicators place Preston (9th) behind smaller centres of the North West region such as Bolton (4th) Blackpool (7th) Stockport (5th), Warrington (6th) and Birkenhead (8th).

5.10 Nevertheless retailer requirements for Preston have remained above the average for the 100 PROMIS centres over the past 5 years, excluding 1998 when they fell below average, due in part to some latent demand being met by the St George's Shopping Centre refurbishment. Preston ranks 32nd of the 100 PMA centres; significantly, within the top 50 UK centres. These requirements have not been satisfied by past development activity and are unlikely to be satisfied through availability of existing stock.

5.11 The PROMIS requirements for Preston are mainly from national multiple retailers, most of which seek modern units in prime locations, either in shopping centre developments or the best locations on town centre high streets. Some requirements are from up-market, aspirational brands, a weak sector in Preston's current retail offer.

5.12 A significant factor, given retail market trends, is the high proportion of small shop units in Preston, compared with other centres, the high level of independent retailers and the large amount of poor secondary and tertiary trading locations. Preston has too many small units, too widely spread throughout the centre, with many in poor secondary locations. This building stock no longer meets key multiple retailer requirements. The centre will be unable to respond adequately to changing retail market requirements unless significant new floorspace is constructed in accordance with requirements and trends.

5.13 Comparable centres to Preston have more multiple retailers, provide greater anchor store provision, better car parking facilities, wider leisure offers and are, almost without exception, either subject to major development proposals, or have benefited from recent major scheme openings. Without significant investment being attracted to Preston over the course of this decade, Preston will fall behind other centres, resulting in a weakened role in the UK shopping hierarchy.

5.14 Virtually all major town centre, retail-led development now seeks to include more than just retail as part of its offer. Many centres include a cinema, health and fitness clubs and other forms of leisure. In addition, there is increasing demand for town centre housing; and for hotel facilities. We judge there is both an opportunity and necessity to provide a leisure component to assist regeneration and in differentiating Preston's offer from other competing centres and in responding to changes in consumer demands.

5.15 For Preston to climb into the top 30 UK retail destinations, we advocate that development should aim to secure two new department stores. Given the significant under representation of key operators in the department store sector within the 'Study Area,' we believe this is a realistic target. The development has to be of sufficiently large scale to attract such stores, to make them feasible and to make the necessary improvement in the town's performance. To achieve this, we advocate a development of circa 41,000 sq.m (450,000 sq.ft) net additional comparison retail space, plus leisure and other uses.

5.16 A detailed Retail Capacity Analysis shows that a development on this scale can be justified on the basis of predicted increases in comparison goods expenditure and that it can increase Preston's market share without material impact on other towns in the region.

5.17 Following a Sequential Site Analysis, it is apparent that there is no more suitable, available and feasible site that is capable of accommodating the necessary scale of development, or capable of providing extensive regeneration benefits, immediately adjoining or extending prime pitch, which is readily capable of being developed, than the commended 'Tithebarn Area.' RPG13 confirms that in many cases it will be possible to accommodate new retail development within, or adjoining existing centres, in locations that would strengthen town centres. We believe the Tithebarn area is such a case.

5.18 However, the future success of Preston town centre is not solely dependent upon securing new retail floorspace, meeting modern retailer requirements and responding to the qualitative deficiencies in the existing provision. It also requires a wider qualitative improvement of the town centre, including provision of a broader range of facilities and attractions; and improved accessibility and car parking.

5.19 If the Tithebarn opportunity is not embraced, we believe that, by the end of the next decade, Preston's role, status and influence will have further declined compared to other sub-regional centres.