APPENDIX 12:
VITALITY AND VIABILITY ASSESSMENTS

ASHTON-IN-MAKERFIELD TOWN CENTRE

General Description of Ashton-in-Makerfield Town Centre

ASH.01 Ashton-in-Makerfield is a town in the north west of England and its urban hinterland is split between the Metropolitan Boroughs of Wigan and St Helens. In 2001 the town had a population of 28,505. Historically part of Lancashire, it is situated in a former coal mining area. The town was originally known as Ashton-in-the-Willows. The wider district consists of: Town Green; Stubshaw Cross; Bryn; Tithe Barn Hillock; Downall Green; Land Gate; Bryn Gates; and Garswood.

ASH.02 Policy S1 of the replacement Wigan UDP identifies Ashton-in-Makerfield as a Town Centre. Ashton-in-Makerfield is a linear shopping centre running north to south along Bolton Road and Gerard Street.

Diversity of Uses

ASH.03 Figures ASH.1 and ASH.2 demonstrate the composition of uses in Ashton-in-Makerfield at 2006 and 2003 respectively. This is based on information provided by GOAD. The composition of the centre at 2006 has been compared to the latest GOAD national averages for UK town centres (at January 2007). A map of the area surveyed at 2006 is included in this report at **Appendix 7**. Unfortunately a map of the area surveyed at 2003 is not available, so we are unable to tell whether the GOAD town centre boundary has changed over the period. The floorspace figures shown are based on the building footprint at ground-floor level only.

Figure ASH.1 Retail Composition of Ashton-in-Makerfield Town Centre, 2006

Sector	No. of Outlets	% of Outlets		Floorspace (sq. m)	% of Floorspace	
		Ashton-in-Makerfield	**GB**		**Ashton-in-Makerfield**	**GB**
Convenience	20	10.87	8.46	3,567	16.32	13.72
Comparison	59	32.07	36.67	6,187	28.30	39.53
Retail Service	29	15.76	12.70	1,877	8.58	6.98
Leisure Services	39	21.20	20.88	6,745	30.85	22.51
Financial & Business Services	22	11.96	11.62	2,127	9.73	9.26
Vacant	15	8.15	9.67	1,356	6.20	8.00
TOTAL	**184**	**100**	**100**	**21,860**	**100**	**100**

Source: Experian GOAD (2006)

Figure ASH.2 Retail Composition of Ashton-in-Makerfield Town Centre, 2003

Sector	No. of Outlets	% of Outlets		Floorspace (sq. m)	% of Floorspace	
		Ashton-in-Makerfield	**Change 03-06**		**Ashton-in-Makerfield**	**Change 03-06**
Convenience	23	12.23	-1.36	3,623	16.52	-0.20
Comparison	56	29.79	+2.28	6,197	28.25	+0.05
Retail Service	26	13.83	+1.93	1,682	7.67	+0.91
Leisure Services	37	19.68	+1.52	6,596	30.07	+0.78
Financial & Business Services	20	10.64	+1.32	1,988	9.06	+0.67
Vacant	26	13.83	-5.68	1,849	8.43	-2.23
TOTAL	**188**	**100**	**-**	**21,934**	**100**	**-**

Source: Experian GOAD (2003)

ASH.04 The principal shopping area of Ashton-in-Makerfield is Gerard Street. At 2006 10.9% of units in Ashton-in-Makerfield were in use for convenience purposes, which compares to a national average of 8.5%. Meanwhile 16.3% of retail floorspace is in use for convenience purposes, which compares to a figure of 13.7% nationally. Clearly the town centre is well provided for by convenience provision. This sector is dominated by the Somerfield, the Gerard Centre, Gerard Street which accounts for 1,480 sq m of floorspace, or 41.5% of convenience floorspace. Other smaller supermarkets in the centre include the Greensway on Gerard Street (560 sq m) and Heron Frozen Foods, the Gerard Centre, Gerard Street (250 sq m). Other convenience traders in the centre are predominantly independents and include: five 'bakers and confectioners'; five 'CTN' retailers; and four 'butchers'. An outdoor market operates in the town centre every Tuesday and Saturday, providing additional convenience provision.

ASH.05 Figure ASH.2 indicates that at 2003 there were 23 convenience retailers in the town centre accounting for 3,623 sq. m of retail floorspace. As such over the period the number of convenience operators in Ashton-in-Makerfield has declined by three units (or 13.04%) and by 56 sq. m. Additionally, the relative proportion of retail floorspace for which convenience traders account has marginally decreased between 2003 and 2006.

ASH.06 Comparison retailing in Ashton-in-Makerfield is under-represented when considered against the national average. Such traders occupy 32.1% of outlets against a national average of 36.7%, and 28.3% of floorspace compared to a national average of 39.5%. The town contains a mixture of multiple and independent comparison traders and the Tuesday and Friday outdoor market provided further provision. Since 2003 the number of comparison units has increased by three, whilst comparison floorspace has decreased by 9 sq. m.

ASH.07 Retail services, which comprise such uses as hairdressers, dry cleaners and petrol filling stations, account for 15.8% of outlets and 8.6% of floorspace in Ashton-in-Makerfield, which compares to a national average of 12.7% and 7% respectively. 'Health and beauty' traders are particularly dominant in this sector, accounting for 15 (or 51.7%) of all outlets. Importantly the town centre contains a Post Office on Bryn Street. Since 2003 the number of retail service outlets has increased by three units, with retail floorspace in this sector rising by 195 sq m.

ASH.08 However, the Boots and Argos stores both located in the Gerard Centre, Gerard Street, are the only retailers present in Ashton-in-Makerfield which are in the top 20 national retailer, as identified by Focus.

ASH.09 Leisure services as defined by GOAD include uses such as restaurants, cafes, bookmakers and public houses. Ashton-in-Makerfield has good provision in this sector with both the proportion of outlets (21.2%) and the proportion of floorspace occupied (30.9%) being above the national average (20.9% and 22.5% respectively). Fast-food and take away units are the most prolific, occupying 10 units or 5.4% of total units in the centre, against a national average for this type of trader of 5% at 2007. Other well represented traders include public houses (nine units) and cafes (six units). Between 2003 and 2006 the number of leisure service traders has increased by two units and the proportion of floorspace by 151 sq m.

ASH.10 In terms of the proportion of retail units occupied, financial and business services are adequately provided for in Ashton-in-Makerfield, occupying 12% of all outlets compared to a figure of 11.6% nationally. However, with respect to the proportion of floorspace which they occupy, financial and business services account for 9.7% of total floorspace which is above the national average for UK town centres of 9.3%. As such the town centre is adequately provided for in this regard. A number of well-known national multiples are present in the town centre in this sector, including: Barclays; Lloyds TSB; and Nat West Bank. Comparing the composition of Ashton-in-Makerfield at 2003 and 2006, the number of financial and business service outlets has increased by two units, whilst the amount of floorspace has increased by 139 sq m.

ASH.11 Overall, comparing the town centre at 2003 and 2006 using figures ASH.1 and ASH.2, the total number of retail units in the town centre, as defined by GOAD, has declined by four. This equates to a decline of 2.1%. Additionally, in terms of the total amount of retail floorspace this has declined by 74 sq m, a fall of 0.3%.

ASH.12 Ashton-in-Makerfield does not just provide a role in the provision of retail goods and services to the population which it serves. It also provides a number of additional services to local people, including a JobCentre, a social club and a dental surgery. In addition a number of residential dwellings are located within the GOAD town centre boundary.

Retailer Requirements

ASH.13 Figure ASH.3 sets out retailer requirements within Ashton-in-Makerfield Town Centre as derived from the Focus Database (April 2007). The list should be treated with a degree of caution as some retailers may put forward their requirements on the Database whilst not having an active desire to locate there. Additionally, the list includes retailers who are already present in the town but are seeking new premises. Furthermore a single retailer may express more than one requirement in a town centre for different sizes of units. Nevertheless it does serve as a useful indicator of the level of demand a centre is experiencing.

Figure ASH.3: Summary of Retailer Requirements within Ashton-in-Makerfield Town Centre, 2007

	Number of Requirements	Minimum Floorspace (sq. m)	Maximum Floorspace (sq. m)
Convenience	4	855	1,533
Comparison	3	321	808
Service	2	84	223
TOTAL	**9**	**1,260**	**2,564**

Source: Focus Report (April 2007) - uses falling within specific retail trade categories from Experian GOAD definitions

ASH.14 Figure ASH.3 indicates that April 2007 there are nine retailers seeking representation within Ashton-in-Makerfield, collectively requiring up to 2,564 sq m (gross) in retail floorspace. Convenience traders account for the highest number of requirements in outlets terms (four), and the highest amount of floorspace (1,533 sq m or 60% of the total floorspace sought). A full list of requirements is included in this report at **Appendix 8**, and traders include Farmfoods, Jack Fulton and Superdrug.

Street Level Vacancies

ASH.15 The proportion of vacant units within any centre can provide a good indication of how the town centre is performing. However, care should be taken when interpreting figures. Vacancies can occur for positive as well as negative reasons e.g. the opening of a new retail centre elsewhere in a town may draw retailers from older properties or more peripheral areas of the town. Vacant units will be found in even the strongest town centre and are simply an indicator of the level of demand in a centre. For example some properties may lay vacant because they are poorly maintained, unsuited to modern retailing requirements or simply not being actively marketed. Conversely a low vacancy rate does not necessarily mean that a centre is performing well. For example, if there is a proliferation of charity shops and other low value uses within a town centre it may be a sign of decline, particularly where these uses are located in prime locations. Despite these issues, it is still a useful indicator of town centre performance.

ASH.16 Figure ASH.1 illustrates that at 2007 there were 15 vacant retail units in the town centre, which occupied a floorspace of 1,356 sq m. This represented 8.2% of all outlets and 6.2% of floorspace, compared to respective national averages of 9.7% and 8%. This indicates the presence of a low number of large vacant properties in the town centre. From examining the GOAD plan of Ashton-in-Makerfield it can be seen that vacancies are dispersed throughout the centre, although there are five vacant units within the Palace Arcade, Bryn Street. It is notable that since the time of the GOAD survey in 2006, some units have since been occupied, suggesting that the current vacancy rate is lower than that suggested in the survey. Figure ASH.2 indicates that since 2003 the number of vacant units has declined significantly by eleven units (or 42.3%), whilst the amount of vacant floorspace has fallen by 492 sq m (or 26.6%) over the 2003 to 2006 period.

Commercial Rents and Yields

ASH.17 Unfortunately due to the modest size of Ashton-in-Makerfield there is no published data on rents or yields achieved. However Donaldson's estimate prime Zone A rents in the town centre to be some £376/ sq m, whilst yields are expected to be between 5- 6%.

Accessibility

ASH.18 Ashton-in-Makerfield is situated on the A49 which connects to Hindley in the north east and St Helens to the south west. The town centre has easy access to the M62, M1 and M6 via the A579. There is plenty of free parking in the centre, allowing both visitors and residents to pay a visit when they please. The centre has a local bus service which visits the neighbouring towns of Atherton, Leigh, Hindley, Tyldesley and Wigan. The Principal Shopping Area is on Gerard Street. Movement around the centre on foot is relatively easy, and pedestrian crossings are provided (Figure ASH.4).

Figure ASH.4: Gerard Street

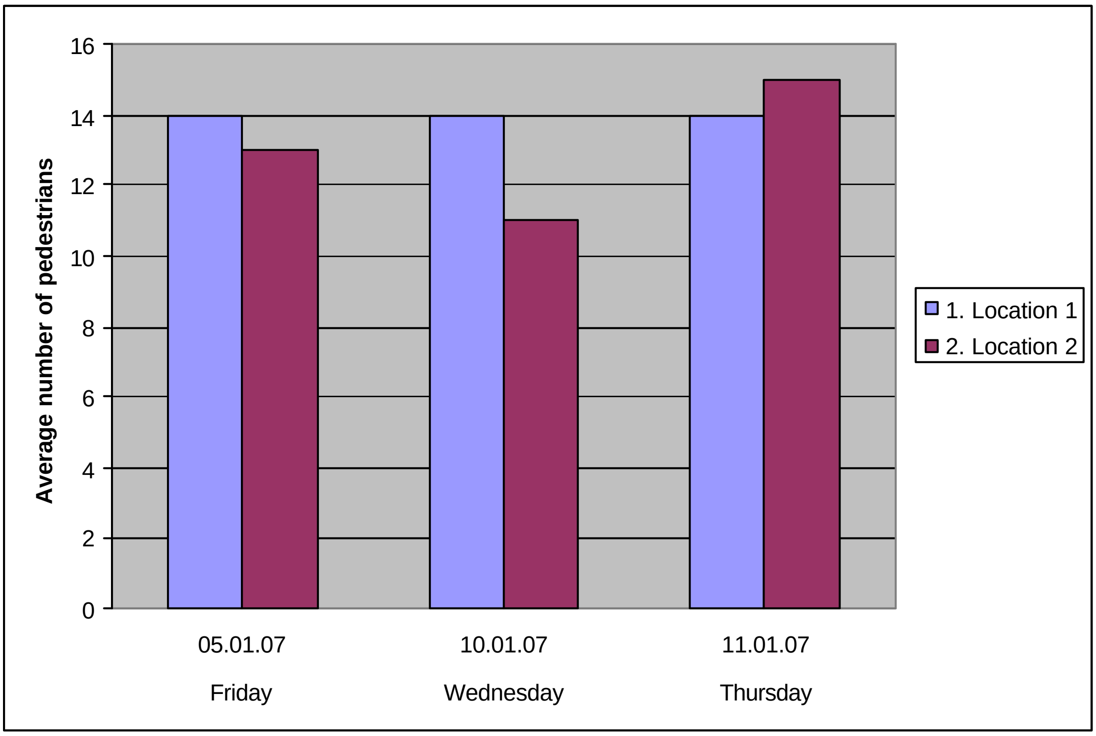
ASH.19 As part of the health check NEMS Market Research have undertaken a pedestrian count of movement around Ashton-in-Makerfield Town Centre. Two count points were identified: Gerard Street entry to Gerard Centre (Location 1) and Gerard Street opposite Princess Road (Location 2). The number of passing pedestrians in both directions was counted over a five minute period at three points during the day: once in the morning (between 10.00 and 11.00), once at midday (between 12.00 and 13.00) and once in the afternoon (between 14.00 and 15.00). This process was repeated over three days, a Friday (05.01.07), Wednesday (10.01.07) and a Thursday (11.01.07). The results were then indexed with the location having the highest level of footfall being afforded a top score of 100, and the subsequent indexed footfall being calculated accordingly. Figures ASH.5 and ASH.6 below show the results obtained through this process.

Figure ASH.5 Ashton-in-Makerfield pedestrian count (average number of pedestrians recorded)

Location	Date of count			Total Count	Total Index
	Friday 05.01.07	Wednesday 10.01.07	Thursday 11.01.07		
Location 1	14	14	14	42	100
Location 2	13	11	15	39	93
TOTAL	**27**	**25**	**29**	**81**	**-**

Source: NEMS Market Research, 2007

Figure ASH.6 Ashton-in-Makerfield pedestrian count



ASH.20 The pedestrian count data indicates that Thursday was the busiest of the three days in terms of footfall, with 29 pedestrians recorded in total for both count points, compared to 27 on the Friday (05.01.07) and 25 on the Wednesday (10.01.07). Although Location 1 (Gerard Street entry to Gerard Centre) recorded higher levels of footfall than Location 2 (Gerard Street opposite Princess Road) on the Friday and Wednesday, there were higher levels of footfall at Location 2 on the Thursday. As a result, Location 1 recorded the greatest number of pedestrians overall with a total count for the three survey days of 42 persons, compared to 39 persons counted at Location 2.

ASH.21 In respect of accessibility, the on-street survey undertaken by NEMS identified the following:

- 72% of visitors to Ashton-in-Makerfield had regular access to a car for personal use during the day and during the evening/night-time;

- The most common method of arriving in the centre was by a car or van (42%). This was followed by on foot (40%) and by bus, minibus or coach (10%);
- Of those that drove the most popular place to park was the Gerard Centre/Somerfield car park, with 83% of drivers leaving their vehicle here. 7% of people parked on-street whereas 3% of drivers parked in the Albert Street car park;
- The majority of drivers (93%) had no difficulty in obtaining a car parking space on the day of the interview;
- 40% of people travelled for less than five minutes to reach Ashton-in-Makerfield, 33% travelled for between six and ten minutes and 12% for between eleven and fifteen minutes;
- Car parking provision was deemed to be ‘about the same’ in Ashton-in-Makerfield compared to other centres by 43% of visitors, although 20% considered it to be ‘better’ than in other centres and 10% that it was ‘worse’; and
- Accessibility by public transport was considered by 47% of visitors to Ashton-in-Makerfield to be ‘about the same’ as other centres, with 17% indicating that it was ‘better’ in Ashton-in-Makerfield than in other centres which they visited, and 7% that it was ‘worse’.

Perception of Safety and Occurrence of Crime

ASH.22 In terms of shopper safety during the day-time, the majority of visitors interviewed through the in-street survey (82%) deemed this to be ‘about the same’ as in other centres which they visited. However a significant 12% considered day-time safety in Ashton-in-Makerfield to be ‘better’ than in other centres. With respect to safety during the evening/night-time 52% indicated that this was about the same’ as in other centres, with 8% stating that evening/night-time safety in Ashton-in-Makerfield was ‘much worse’ than in other centres. 30% of respondents did not know either way.

Customer Views and Behaviour

ASH.23 The in-street survey undertaken by NEMS Market Research indicated the following in respect of visitors to Ashton-in-Makerfield:

- The vast majority of visitors to Ashton-in-Makerfield (85%) had travelled to the centre directly from home;
- Most of those interviewed (66%) indicated that they were not a visitor to the local area;
- The most popular responses recorded when visitors were asked why they were in Ashton-in-Makerfield were: to undertake food and grocery shopping (48%), to visit the bank/building society/Post Office (15%) browsing (8%);
- Half of visitors (52%) planned to stay in the centre for up to half an hour, with a further 47% planning to stay for up to two hours.
- 43% of visitors indicated that they planned to undertake their main food shop on the day of the survey. Of these, 39% stated that they visited Ashton-in-Makerfield once a week for such purposes;
- 88.3% of visitors did not plan to purchase clothing and footwear goods on the day of the survey, with the majority of these people (31%) last visited Wigan for such purposes; and
- When visitors were asked how often they visited the centre today compared to five years ago, 48% stated that they visited Ashton-in-Makerfield 'about as frequently'. However, a significant 12% visited 'less frequently than before', whilst 8% visited 'much less frequently than before'.

Environmental Quality

ASH.24 Ashton-in-Makerfield is predominantly a linear centre, focused on Gerard Street (Figure ASH.7). The centre is well used by vehicular traffic and none of the centre

Figure ASH.7: Gerard Street

is pedestrianised, which does not aid movement by foot. Despite this, pavements in this area are wide and pedestrian crossings are provided. The streets are clean with no evidence of litter and generally shop units are maintained to good standard. This creates an attractive shopping environment. However, Garswood Street was identified to contain a number of vacancies which were of mixed quality.

Figure ASH.8: The Gerard Centre

ASH.25 In addition, the war memorial on Warrington Road provides an attractive area. Street furniture within the centre is well integrated and includes lighting, bins and limited benches, whilst CCTV is in operation.

Business Survey

ASH.26 A total of 202 surveys were delivered to existing businesses in Ashton-in-Makerfield. A total of 47 responses were returned providing a response rate of 23%. The survey revealed the following:

- Of the businesses who responded to the survey, 28% had been trading in the centre for under five years, whilst 26% had been trading for over twenty years. Notably no respondents had been operating for under six months;
- Respondents to the survey comprised 30% comparison retailers, 23% retail services, 23% professional services, 15% convenience retailers and 6% leisure services;
- 58% of respondents deemed business to have either grown ‘significantly’ or ‘moderately’ since they began trading in Ashton-in-Makerfield, with 15% considering trade to have remained largely static;
- 36% of respondents believed their business to be trading either well or very well. , Some 57% of respondents believed their business to be trading moderately;

- The majority of respondents (72%) leased their premises;
- Respondents primarily rely on local residents for 67% of their trade;
- Almost two-thirds of respondents (64%) deemed there to be too many non-retail uses in the town centre;
- Inadequate customer car parking was considered by the highest proportion of respondents (17%) to be the main constraint on current business performance. This was followed by the poor quality of the town centre shopping environment (15%) and high rents/overheads (13%);
- 65% of respondents had no plans to alter their business in any way over the next five years; and
- The biggest competitor to business in Ashton-in-Makerfield was seen to be Wigan.

ASH.27 When asked to rate a number of different aspects of the town centre, the price of town centre parking was seen to be good by 40% of respondents, although it is evident that car parking within Ashton-in-Makerfield is free. Some 87% of respondents considered the market in Ashton-in-Makerfield to be poor and a similar proportion (81%) believed public toilets to be poor. In terms of improving Ashton-in-Makerfield some 89% of the respondents felt that more public toilets, increasing the quantity of parking spaces and reducing traffic congestion would all improve the centre.

Conclusions on Vitality and Viability

ASH.28 This study has shown Ashton-in-Makerfield to be a vital and viable town centre. Accessibility was seen to be generally good, and the town centre shopping environment was attractive. Additionally, the convenience sector, retail service, leisure service and financial and business service sectors were shown to be strong when compared to the national average.

ASH.29 Notwithstanding these positive attributes, a low demand was shown by retailers seeking to locate to the town. Also, the comparison sector in the town centre is below the UK national average. However, vacancy rates in Ashton-in-Makerfield have decreased significantly in the past few years, highlighting a strength in Ashton-in-Makerfield's retail sector.

ATHERTON TOWN CENTRE

General Description of Atherton Town Centre

ATH.01 Atherton is a town in the south-east of the Borough. Built on and around seven brooks, it has a long industrial past including mining and milling. It lies some seven miles to the south-east of Wigan and three miles north-east of Leigh. It is situated on the A577 and A579.

ATH.02 Policy S1 of the adopted Wigan UDP identifies Atherton as a Town Centre. Atherton is a linear shopping centre running east to west along Market Place and Market Street. It also extends someway south along Crab Tree Lane to incorporate a Tesco supermarket.

ATH.03 The eastern end of Market Street is pedestrianised and from the junction with Bullough Street is defined as a Principal Shopping Area in the UDP.

Diversity of Uses

ATH.04 Figure ATH.1 and ATH.2 demonstrate the composition of uses in Atherton at 2005 and 2001. This is based on information provided by GOAD. The composition of the centre at 2005 has been compared to the latest GOAD national averages for UK town centres (at January 2007). A map of the area surveyed at 2005 is included in this report at **Appendix 7**. The GOAD survey area correlates almost exactly with the Town Centre as defined in the Wigan UDP, except for a few additional units in the GOAD Town Centre plan which situated to the east of Atherton. Unfortunately a map of the area surveyed at 2001 is not available, so we are unable to tell whether the GOAD town centre boundary has changed over the period. The floorspace figures shown are based on the building footprint at ground-floor level only.

Figure ATH.1 Retail Composition of Atherton Town Centre, 2005

Sector	No. of Outlets	% of Outlets		Floorspace (sq. m)	% of Floorspace	
		Atherton	GB		Atherton	GB
Convenience	17	10.18	8.46	5,463	22.65	13.72
Comparison	48	28.74	36.67	5,295	21.96	39.53
Retail Service	28	16.77	12.70	2,369	9.82	6.98
Leisure Services	37	22.16	20.88	6,234	25.85	22.51
Financial & Business Services	18	10.78	11.62	2,917	12.10	9.26
Vacant	19	11.38	9.67	1,839	7.63	8.00
TOTAL	**167**	**100**	**100**	**24,117**	**100**	**100**

Source: Experian GOAD (2005)

Figure ATH.2 Retail Composition of Atherton Town Centre, 2001

Sector	No. of Outlets	% of Outlets		Floorspace (sq. m)	% of Floorspace	
		Atherton	Change 01-05		Atherton	Change 01-05
Convenience	19	10.86	-0.68	5,667	22.23	+0.42
Comparison	50	28.57	+0.17	5,955	23.36	-1.40
Retail Service	30	17.14	-0.37	3,131	12.28	-2.46
Leisure Services	31	17.71	+4.45	6,131	24.05	+1.80
Financial & Business Services	17	9.71	+1.07	2,453	9.62	+2.48
Vacant	28	16.00	-4.62	2,155	8.45	-0.82
TOTAL	**175**	**100**	**-**	**25,492**	**100**	**-**

Source: Experian GOAD (2001)

ATH.05 At 2005 10.2% of units in Atherton were in use for convenience purposes, which compares to a national average of 8.5%. Meanwhile 22.7% of retail floorspace is in use for convenience purposes, which compares to 13.7% nationally. Cleary the town centre is well provided by convenience retail. This sector is dominated by the Tesco supermarket on Crab Tree Lane which accounts for 3,642 sq. m of floorspace, or 64% of total convenience floorspace. Other convenience traders in the centre are predominantly independents and include: four ‘butchers’; four CTN retailers and three ‘bakers and confectioners’. A market operates in the town centre on Fridays, providing an additional convenience offer.

ATH.06 Figure ATH.2 indicates that at 2001 there were 19 convenience retailers in the town centre accounting for 5,667 sq. m of retail floorspace. As such over the period the number of convenience operators in Atherton has declined by two units (or 11%) and floorspace by 204 sq. m. Notwithstanding this the relative proportion of retail floorspace for which convenience traders account has marginally increase between 2001 and 2005.

ATH.07 Comparison retailing in Atherton is under-represented when considered against the national average. Such traders occupy 28.7% of outlets against a national average of 36.7%, and 22.0% of floorspace compared with a national average of 39.5%. The town contains a mixture of multiple and independent comparison traders, and the Friday market enhances this; the Tesco supermarket sells some non-food goods. Since 2001 the number of comparison units has declined by two, whilst comparison floorspace has decreased by 660 sq. m.

ATH.08 Retail services, which comprise such uses as hairdressers, dry cleaners and petrol filling stations, account for 16.8% of outlets and 9.8% of floorspace, which compares to a national average of 12.7% and 7.0% respectively. ‘Health and beauty’ traders are particularly dominant in this sector, accounting for 16 (or 57%) of all outlets. Importantly the town centre contains a large Post Office on Market Street. However, the Boots store on Marker Street is the only retailer present in Atherton which is in the top 20 national retailers, as identified by Focus. Since 2001 the number of retail service outlets has fallen by two units, with retail floorspace in this sector falling by 762 sq. m.

ATH.09 Leisure services as defined by GOAD include uses such as restaurants, cafes, bookmakers and public houses. Atherton has a high proportion of uses in this sector with both the proportion of outlets (22.2%) and the proportion of floorspace occupied (25.9%) being above the national average (20.9% and 22.5% respectively). Fast-food and take away units are the most prolific, occupying 14 units or 8.4% of total units in the centre, against a national average for this type of trader of 5.0% at 2007. Other well represented sectors include public houses (nine units) and cafes (four units). Between 2001 and 2005 the number of leisure service traders has increased by six units and the proportion of floorspace by 103 sq. m.

ATH.10 In terms of the proportion of retail units occupied, financial and business services are under-provided for in Atherton, occupying 10.8% of all outlets compared to a figure of 11.6% nationally. However, with respect to the proportion of floorspace which they occupy, financial and business services account for 12.1% of total floorspace which is above the national average for UK town centres of 9.3%. As such the town centre is adequately provided for in this regard. A number of national multiples are present in the town centre in this sector, including: Halifax Bank; Royal Bank of Scotland; Natwest; Abbey Bank; and Lloyds TSB. Comparing the composition of Atherton at 2001 and 2005, the number of financial and business service outlets has increased by one unit, whilst the amount of floorspace has increased by 464 sq. m.

ATH.11 Overall, comparing the town centre at 2001 and 2005, using Figures ATH.1 and ATH.2, the total number of retail units in the town centre, as defined by GOAD, has declined by eight. This equates to a decline of 5%. Conversely in terms of the total amount of retail floorspace this has declined by 1,375 sq. m, again a fall of 5%.

ATH.12 Atherton does not just provide a role in the provision of retail goods and services to the population which it serves. It also provides a number of additional services to local people, including a JobCentre Plus, a dance school and a doctor’s surgery. In addition a number of residential dwellings are located within the GOAD town centre boundary.

Retailer Requirements

ATH.13 Figure ATH.3 sets out retailer requirements within Atherton Town Centre as derived from the Focus Database (January 2007). This list should be treated with a degree of caution as some retailers may put forward their requirements on the Database whilst not having an active desire to locate there. Additionally, the list includes retailers who are already present in the town but are seeking new premises. Furthermore a single retailer may express more than one requirement in a town centre for different sizes of units. Nevertheless it does serve as a useful indicator of the level of demand a centre is experiencing.

Figure ATH.3: Summary of Retailer Requirements within Atherton Town Centre, 2007

	Number of Requirements	Minimum Floorspace (sq. m)	Maximum Floorspace (sq. m)
Convenience	4	465	975
Comparison	3	706	1,784
Service	2	84	223
TOTAL	**9**	**1,255**	**2,982**

Source: Focus Report (January 2007) - uses falling within specific retail trade categories from Experian GOAD definitions

ATH.14 Figure ATH.3 indicates that at January 2007 there were nine retailers seeking representation within Atherton, collectively requiring up to 2,982 sq. m (gross) in retail floorspace. Traders with a requirement include Jack Fulton, Superdrug, Cooltrader and Pets at Home. Convenience traders account for the highest number of requirements in outlet terms (four), although comparison traders are seeking the highest amount of floorspace; 1,784 sq. m, or 60% of the total floorspace sought. A full list of requirements is included in this report at **Appendix 8**.

ATH.15 It is evident from examining Focus data that the current level of requirements (nine) is the highest level ever recorded for Atherton, and is significantly above the expected average for the last five years (four).

Street Level Vacancies

ATH.16 The proportion of vacant units within any centre can provide a good indication of how the town centre is performing. However, care should be taken when interpreting figures. Vacancies can occur for positive as well as negative reasons e.g. the opening of a new retail centre elsewhere in a town may draw retailers from older properties or more peripheral areas of the town. Vacant units will be found in even the strongest town centre and are simply an indicator of the level of demand in a centre. For example some properties may lay vacant because they are poorly maintained, unsuited to modern retailing requirements or simply not being actively marketed. Conversely a low vacancy rate does not necessarily mean that a centre is performing well. For example, if there is a proliferation of charity shops and other low value town centre uses it may be a sign of decline, particularly where these uses are located in prime locations. Despite these issues, it is still a useful indicator of town centre performance.

ATH.17 Figure ATH.1 illustrates that at 2007 that there were 19 vacant retail units in the town centre, with a total floorspace of 1,839 sq. m. This represents 11.4% of all outlets and 7.6% of floorspace, compared to respective national averages of 9.7% and 8.0%. This indicates the presence of a high number of small vacant properties in the town centre. From examining the GOAD plan of Atherton it can be seen that vacancies occur in larger quantities on the periphery of the town centre, along the western end of Market Street and on Market Place. Indeed, Market Street between Bag Lane to the west and Alma Street to the east does not contain a single vacant property, indicating that this is the most desirable area for retailers. It is notable that since the time of the GOAD survey in 2005 some units have since been occupied, suggesting that the current vacancy rate is lower than that suggested in this survey. Notwithstanding this, some vacancies within the town centre are of very poor quality (Figure ATH.4). Figure ATH.2 indicates since 2001 the number of vacant units declined significantly (by nine units or 32%) over the 2001 to 2005 period, whilst the amount of vacant floorspace fell by 316 sq. m (or 15%).

Figure ATH.4: Vacant unit on Market Street

Commercial Rents and Yields

ATH.18 Unfortunately due to the size of Atherton Town Centre there is no published data on yields achieved. However on the basis of the work undertaken by Donaldson's (**Appendix 9**) Prime Zone A rents in Atherton Town Centre can be placed in the region of £200- 269/ sq. m.

Accessibility

ATH.19 Atherton is situated on the A577 which connects to Wigan to the west and Tydlesley and the A580 to the south-east. The A579 also runs through the town connecting it to Leigh to the south-west and Bolton to the north-east. The town centre has easy access to the M62, M1 and M6 via the A579. The largest car park in the town centre is that which serves the Tesco supermarket, which has approximately 200 spaces. Two other off-road car parks are located in the town at Alma Street (90 spaces) and St Johns Street (80 spaces). Limited on-street parking is available to the western end of Market Street. A one-way road system is in operation on the road network around Atherton Town Centre.

ATH.20 The town centre also benefits from good accessibility by public transport. Although Market Street is closed to vehicular traffic between 10 am and 4 pm Monday to Saturday, buses are permitted, with a covered bus station being located in the heart of the town (Figure ATH.5). Buses (numbers 12, 32, 33, 132, 582, 583, 592, 620, 682, 683 and 685) connect Atherton with Bolton, Leigh, Wigan, St Helens, and Manchester and to the Trafford Centre and Middlebrook Retail and Leisure Complex. A night bus (number 39) is also in operation. Traffic along the pedestrianised parts of Market Street is restricted to 20 mph.

Figure ATH.5: Vacant unit on Market Street

ATH.21 Although Atherton does contain a train station, this is located approximately a mile to the north-east of the town centre. An additional train station, Hag Fold, is also situated within Atherton but at a greater distance from the town centre. Atherton is on the Manchester-Southport Line, with two trains per hour during Monday to Saturday daytimes towards both Wigan and Manchester.

ATH.22 The Principal Shopping Area of Atherton is pedestrian friendly and provides a safe shopping environment. This area is pedestrianised (except buses) during the day Monday to Saturday and pavements are wide and well maintained (Figure ATH.6). Along the remainder of Market Street, pavements remain wide and pedestrian movement is easy, with vehicular traffic being slow moving. However, the retail units at the western end of Market Street do feel detached from the rest of the town centre, and footfall in the vicinity is low. Market Place too is easily navigable for pedestrian users of Atherton, and pedestrian crossings are provided along Church Street and Mealhouse Lane (just outside the defined Town Centre) in order to ease movement on foot from surrounding residential areas. The Tesco supermarket at present functions more as a standalone shopping facility but could be better integrated into the rest of the town centre by signage and pedestrian crossings to encourage linked trips.

Figure ATH.6: Units on Elliott Street

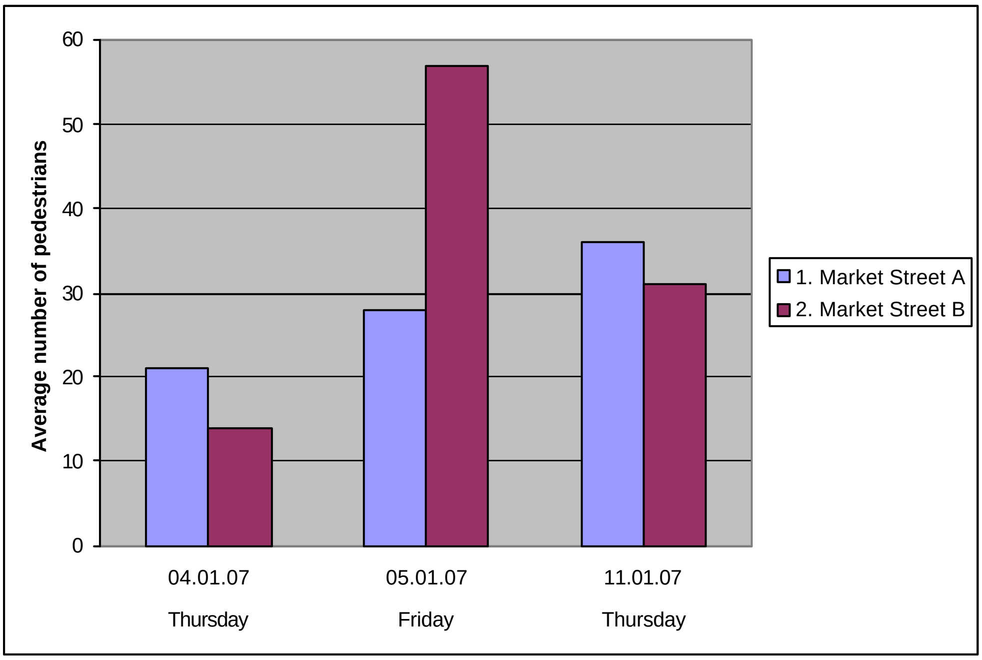
ATH.23 As part of the health check, NEMS Market Research have undertaken a pedestrian count of movement around Atherton Town Centre. Two count points were identified: Market Street: outside the Dry Cleaning Centre (Market Street A); and outside Boots (Market Street B). The number of passing pedestrians in both directions was counted over a five minute period at three points during the day: once in the morning (between 10.00 and 11.00), once at midday (between 12.00 and 13.00) and once in the afternoon (between 14.00 and 15.00). This process was repeated over three days two Thursdays (04.01.07 and 11.01.07) and a Friday (05.01.07). The results were then indexed with the location experiencing the highest level of footfall being afforded a score of 100, and the subsequent indexed footfall being calculated accordingly. Figures ATH.7 and ATH.8 below show the results obtained through this process.

Figure ATH.7 Atherton pedestrian count (average number of pedestrians recorded)

Location	Date of count			Total Count	Total Index
	Thursday 04.01.07	Friday 05.01.07	Thursday 11.01.07		
1. Market Street A	21	28	36	85	83
2. Market Street B	14	57	31	102	100
TOTAL	**35**	**85**	**67**	**187**	**-**

Source: NEMS Market Research, 2007

Figure ATH.8 Atherton pedestrian count



ATH.24 The pedestrian count data indicates that Friday was the busiest of the three days in terms of footfall, with 85 pedestrians recorded on average for both count points, compared to 35 on the first Thursday (04.01.07) and 67 on the second Thursday (11.01.07). Although Market Street A recorded higher levels of footfall than Market Street B on both of the Thursdays, on the Friday (05.01.07) Market Street B recorded more than twice as many pedestrians as Market Street A. As a result, Market Street B recorded the greatest number of pedestrians overall

with an average total count for the three survey days of 102 persons, compared to 85 persons counted at Market Street A.

ATH.25 In respect of accessibility, the in-street survey undertaken by NEMS identified the following:

- 56% of visitors to Atherton had regular access to a car for personal use during the day and during the evening/ night-time;
- The most common method of arriving in the centre was on foot (62%). This was followed by a car or van (26%) and by bus, minibus or coach (12%);
- Of those that drove the most popular place to park was seen to be on-street, with 44% of drivers doing so. The most frequently used car parks are: Mealhouse Lane (19%); and Alma Street (13%);
- The majority of drivers (87%) had no difficulty in obtaining a car parking space on the day of the interview;
- 51% of people travelled for less than five minutes to reach Atherton, 33% travelled for between six and ten minutes and 12% travelled for between eleven and fifteen minutes;
- Car parking provision was deemed to be 'about the same' in Atherton compared to other centres by 34% of visitors, although 23% considered it to be 'worse' than in other centres and 13% that it was 'better'; and
- Accessibility by public transport was considered by 43% of visitors to Atherton to be 'about the same' as other centres, with 23% indicating that it was 'better' than in other centres which they had visited; and 20% considered it to be 'worse'.

Perception of Safety and Occurrence of Crime

ATH.26 In terms of shopper safety during the day-time, the majority of visitors interviewed through the in-street survey (62%) deemed this to be 'about the same' as in other centres which they visited. However, a significant proportion (20%) considered day-time safety in Atherton to be ‘better’ than in other centres. With respect to safety during the evening/ night-time 34% indicated that this was ‘about the same’ as in other centres, with 25% stating that evening/ night-time safety in Atherton was ‘worse’ than in other centres. 30% of respondents did not know either way.

Customer Views and Behaviour

ATH.27 The in-street survey undertaken by NEMS Market Research indicated the following in respect of visitors to Atherton:

- The vast majority of visitors to Atherton (93%) had travelled to the centre directly from home;
- Most of those interviewed (82%) indicated that they were not a visitor to the local area;
- The most popular responses recorded when visitors were asked why there were in Atherton were: to undertake food and grocery shopping (49%); to visit the bank/ building society/ Post Office (16%); and due to work/ school/ college (12%);
- Half of visitors (51%) planned to stay in the centre for up to half an hour, with a further 33% planning to stay for up to two hours;
- 49% of visitors indicated that they planned to undertake their main food shop on the day of the survey. Of these, 97% stated that they visited Atherton at least once a week for such purposes;
- 95% of visitors did not plan to purchase clothing and footwear goods on the day of the survey, with the majority of these people (51%) last visited Bolton for such purposes;
- When visitors were asked how often they visited the centre today compared to five years ago, 44% stated that they visited Atherton ‘about as frequently’. However, a significant (30%) visited ‘less frequently than before’, whilst 15% visited ‘more frequently than before’;

ATH.28 Visitors to Atherton were asked to rate the centre on a number of aspects, compared to other shopping centres which they visited. The aspects identified by more than half of respondents as being either 'worse' or 'much worse' in Atherton than in other centres were: choice of shops; quality of shops; leisure facilities; shopping environment; and entertainment/ events/ performances. However, the range of services such as banks and other financial services, cleanliness and public information/ signposts/ performances were seen to be 'about the same' as other centres, according to the majority of visitors.

Environmental Quality

ATH.29 Atherton is predominately a linear centre, although it also incorporates a Tesco supermarket located on Crab Tree Lane. As highlighted above the eastern end of Market Street is pedestrianised during the day (except for buses), and this delivers a safe environment for shoppers (Figure ATH.9). Pavements in this area are wide, and a pedestrian crossing is provided. The streets are clean with no evidence of litter, whilst shop units themselves are maintained to high standards of design. This creates an attractive shopping environment. Street furniture present in this area includes lighting, benches, bins and bike racks, whilst CCTV is in operation.

Figure ATH.9: Market Street

ATH.30 Along the western end of Market Street, past the junction with Smith Street, vehicular traffic is permitted to use the road. However, this area remains quiet with limited flows of traffic. Whilst occupied units in the vicinity are of adequate quality, there are a number of vacancies in the area, several of which are of poor quality. Footfall in this area is relatively low, and it does feel somewhat detached from the rest of the town centre. Residential properties are mixed in with retail uses in this area.

ATH.31 To the east of the Principal Shopping Area along Market Place are a number of retail units, predominately independent traders. Occupied units are maintained to a high standard (Figure ATH.10) and an area of public open space is provided adjacent to the St John the Baptist church. The Tesco superstore is located to the east of the centre, however it does feel separated from it and exists more as a separate entity rather than an integrated part of the town centre. Improving links between this facility and the rest of the town centre would be beneficial.

Figure ATH.10: Crab Tree Lane/ Market Place

Business Survey

ATH.32 A postal questionnaire was distributed to all local businesses within Atherton. 147 questionnaires were posted with 36 being returned: a response rate of 24%. The main findings of the business survey were as follows:

- 73% of respondents had been trading in Atherton for ten years or more;
- Respondents were divided between non-food retailers (37%), retail services (20%), professional services (20%), food retailers (14%) and leisure services (9%);
- Since trading began, a significant 31% of respondents indicated that trade had 'declined significantly'. 36% indicated that their trade had either 'grown moderately' or 'grown significantly' since they began trading, with 22% stating that trade had 'remained largely static';

- 43% of respondents felt that currently their business was trading 'moderately', with some 34% indicating that their business was trading either 'well' or 'very well';
- 51% of respondents were owner occupiers and 49% were leaseholders;
- In total 172 people were employed by respondents of which most (58%) were employed on a part-time basis;
- Local residents were replied upon by 68% of respondents for the majority of their business;
- 56% of respondents stated that they considered the town centre to have a 'good balance' between shops and other non-retail uses;
- The main constraints on current business performance were considered to be: high rents/ overheads (16%); inadequate customer car parking (15%); and lack of day visitors/ tourists to the town (14%);
- Most respondents (53%) had no plans to alter their business in any way over the next five years; and
- Leigh was deemed by 31% of respondents as being their major competitor, with a further 23% considering Bolton to be their major competitor.

ATH.33 Respondents were asked to rate a number of different aspects of the town centre. Issues highlighted as being 'poor' by a high number of respondents included: public toilets (75%), town centre police presence (75%), range of shops and services (64%), marketing and promotion (60%) and town centre events/ activities (56%). Respondents were also asked to consider a range of measures to improve the town centre. Popular measures to improve Atherton were seen to be more marketing and promotion, which 90% of businesses felt would improve the centre, followed by greater town centre police presence (85%), more public toilets (85%), town centre wardens (83%) and cleanliness of paths/ public spaces (80%).

Conclusions on Vitality and Viability

ATH.34 In conclusion Atherton can be seen to have performed well in a number of different areas. Convenience retailing, retail services, leisure services and financial and business services are all well provided, having above average representation when compared to the UK national average. The proportion of vacant floorspace at 2005 was seen to be below the national average, with Focus database recording a high number of retailers currently seeking representation in the town centre. Atherton is accessible by a variety of means of transport, and the Principal Shopping Area provides a safe environment for pedestrians.

ATH.35 However a number of areas of concern were also noted. The 2005 GOAD information highlighted that there are a high number of vacant units in the town centre, and from our site survey it is evident that many of these are of poor environmental quality. Comparison representation in the town centre is below the national average with respect to both the proportion of outlets and proportion of floorspace occupied. In addition links between the towns shopping core and periphery areas of the town centre could be stronger. The lack of public toilets in Atherton was identified as a key issue by traders.

GOLBORNE TOWN CENTRE

General Description of Golborne Town Centre

GOL.01 The town of Golborne is situated in the South of the Borough adjacent to the A580. At 2001 the Golborne area had a population of 23,119, according to the Census. The town owes most of its early growth to the mining industry, although more recent growth can largely be attributed to Golborne's development as a satellite town for Warrington, Leigh and Wigan.

GOL.02 The defined town centre of Golborne comprises retail units located on Heath Street and High Street, as designated under Policy S1B of the adopted Wigan UDP. The Principal Shopping Area, defined under Policy S1A, incorporates units situated around the junction of Heath Street and High Street.

Diversity of Uses

GOL.03 Figure GOL.1 below demonstrates the diversity of uses present within Golborne Town Centre, (town centre as defined in the adopted Wigan UDP). This is based on a site survey undertaken by WYG in January 2007. The results obtained have been grouped on the basis of the GOAD categorisations of town centre uses which allows comparisons to be made against the UK national average. Figure GOL.2 shows the number of units present in Golborne Town Centre, according to a survey conducted for Wigan Council by WYG in 2001. However, it should be noted that the UDP town centre boundaries have changed since 2001, and so the information contained in Figure GOL.2 is included for indicative purposes only. The floorspace figures shown are based on the building footprint at ground-floor level only.

Figure GOL.1 Retail Composition of Golborne Town Centre, 2007

Sector	No. of Outlets	% of Outlets		Floorspace (sq. m)	% of Floorspace	
		Golborne	GB		Golborne	GB
Convenience	6	8.70	8.46	567	8.65	13.72
Comparison	11	15.94	36.67	1,242	18.94	39.53
Retail Service	12	17.39	12.70	792	12.08	6.98
Leisure Services	11	15.94	20.88	1,077	16.43	22.51
Financial & Business Services	5	7.25	11.62	414	6.31	9.26
Vacant	24	34.78	9.67	2,464	37.58	8.00
TOTAL	**69**	**100**	**100**	**6,556**	**100**	**100**

Source: WYG (2007)

Figure GOL.2 Retail Composition of Golborne Town Centre, 2001

Sector	No. of Outlets	% of Outlets	Change (2001-2007)
Convenience	7	8.86	-0.16
Comparison	23	29.11	-13.17
Service (A1)	11	13.92	+3.47
Vacant	20	25.32	+9.46
Other (inc. A2/A3)	18	22.78	+0.41
TOTAL	**79**	**100**	**-**

Source: Wigan Council- Town Centre Surveys (2001)

GOL.04 Figure GOL.1 indicates that at the time of the WYG survey (January 2007) 8.7% of units within Golborne were in use for convenience retailing purposes against a national average of 8.5%. These units equate to 8.7% of floorspace compared to a figure of 13.7% nationally. As such, this sector is somewhat under-provided for in Golborne. Of the six convenience units located in the town centre, three are in use as ‘butchers’, one as a CTN retailer, one as an ‘off licence’ and one as a ‘shoe repairs and key cutting’ store. A Thursday market operates in the town, providing an additional convenience offer. It should be noted however that Golborne is served by a large-format ASDA supermarket located approximately half a mile from the defined town centre. Figure GOL.2 shows that since 2001 the number of convenience retailers in Golborne has declined by one unit.

GOL.05 The comparison sector in Golborne is under-represented with both the proportion of retail units (15.9%) and the proportion of vacant floorspace (18.9%) being below the national average considerably (36.7% and 39.5% respectively). Eleven comparison traders are situated within the town centre, covering eight sub-categories of comparison goods, as defined by GOAD; these include two pharmacies, both run by Co-op. Additional comparison provision is offered by the weekly market. The ASDA superstore located out-of-centre also offers some comparison goods. Since 2001 the comparison sector has declined by a significant 12 units (or 52%). This equates to a fall of 13.2 percentage points.

GOL.06 Retail services in Golborne are above the national average in respect of both the proportion of units and the proportion of floorspace occupied. Retail services account for 17.4% of all outlets against a national average of 12.7%, and 12.1% of retail floorspace compared to 7.0% nationally. The types of traders present in Golborne in this category include: five hairdressers; an opticians; a Post Office; and a dry cleaners. Between 2001 and 2007, the number of retail service outlets has fallen by one unit.

GOL.07 There are a total of 11 leisure service retailers in Golborne who collectively occupy 1,077 sq. m of retail floorspace. This translates to 15.9% of all outlets and 16.4% of total floorspace, compared to respective national averages of 20.9% and 22.5% respectively. This sector is dominated by 'fast food and take away' traders of which there are seven in the town, underlining the predominantly service role the town centre performs for its local catchment.

GOL.08 In terms of the financial and business service sector, such uses represent 7.3% of total retail floorspace in the town centre against a national average of 11.6%. In terms of the proportion of floorspace occupied, 6.3% is in use for financial and business service purposes, compared to 9.3% nationally. The town contains two national multiples in this sector: Halifax and the Royal Bank of Scotland.

GOL.09 Although no figures are available for 'leisure services' and 'financial and business services' separately, if combined they can be considered against the 'other' category of use used in the 2001. Consequently at 2007 there were 16 units in 'other' use in Golborne, which compares with 18 at 2001. However, despite a fall of two units over the 2001 to 2007 period, the relative proportion of this type of trader has marginally increased.

GOL.10 Overall, the number of retail outlets in Golborne at 2007 stood at 69, which compares to 79 recorded at 2001; a decline of 13%. This decline is most probably due to the UDP defined town centre changing since 2001, although some smaller retail units may have been combined to form larger ones over the period. The town centre contains a number of residential properties within it, adjacent to retail units. It also has a number of community uses including the Council Offices, a Police post, a health centre, a dentist, two Churches and a Library.

Street Level Vacancies

GOL.11 The proportion of vacant units within any centre can provide a good indication of how the town centre is performing. However, care should be taken when interpreting figures. Vacancies can occur for positive as well as negative reasons e.g. the opening of a new retail centre elsewhere in a town may draw retailers from older properties or more peripheral areas of the town. Vacant units will be found in even the strongest town centre and are simply an indicator of the level of demand in a centre. For example some properties may lay vacant because they are poorly maintained, unsuited to modern retailing requirements or simply not being actively marketed. Conversely a low vacancy rate does not necessarily mean that a centre is performing well. For example, if there is a proliferation of charity shops and other low value uses, this may be a sign of decline, particularly where these uses are located in prime locations. Despite these issues, it is still a useful indicator of town centre performance.

GOL.12 According to the site survey undertaken by WYG, 24 retail units within Golborne were vacant at January 2007. These units occupied a total floorspace of 2,464 sq. m. This equates to 34.8% of all retail units against 9.7% nationally, and 37.6% of retail floorspace compared to 8.0% nationally. As such the town centre evidently has a problem with a proliferation of vacant units, and additionally a number of further vacancies are located just outside the defined town centre on High Street. From examining the concentration of vacancies in the town centre, as shown in the town centre plan (**Appendix 7**), it can be seen that most occur outside the Principal Shopping Area with two distinct clusters: one at the northern end of High Street and one at the western end of Heath Street. It should be noted however that many of these vacant units were under reconstruction at the time of the survey (Figure GOL.3), suggesting that they will be brought back into use in the near future, which will be beneficial for the town.

Figure GOL.3: Construction work in Golborne

Commercial Rents and Yields

GOL.13 There is no published data available on rents or yields achieved in Golborne due to the size of the centre. Donaldson's do, however, highlight that at April 2003 prime Zone A rents were in the region of £107/ sq m.

Accessibility

GOL.14 Golborne Town Centre is located on the A573 which links to the A580 one mile to the south and Wigan some six miles to the north. The A573, A49 and A580 provide easy access to the M6 (Junctions 23 and 24); communications by road are good. Parking in the centre is free and consists of a large surface car park to the east of units on High Street, in addition to some on-street parking.

GOL.15 Bus services connect the town centre with Wigan, Leigh and Ashton-in-Makerfield amongst other destinations, whilst the town centre is served by a night-bus (number 600). Golborne does not contain a railway station.The town centre provides a safe environment for pedestrians. Pavements in the town centre are wide with evidence of recent paving work along High Street (Figure GOL.4). Consequently pavements here are smooth and well maintained. There is little vehicular traffic through Golborne which reduces to risk of conflicts between vehicles and pedestrian users. A pedestrian crossing has been provided on High Street which is linked to traffic lights.

Figure GOL.4: High Street

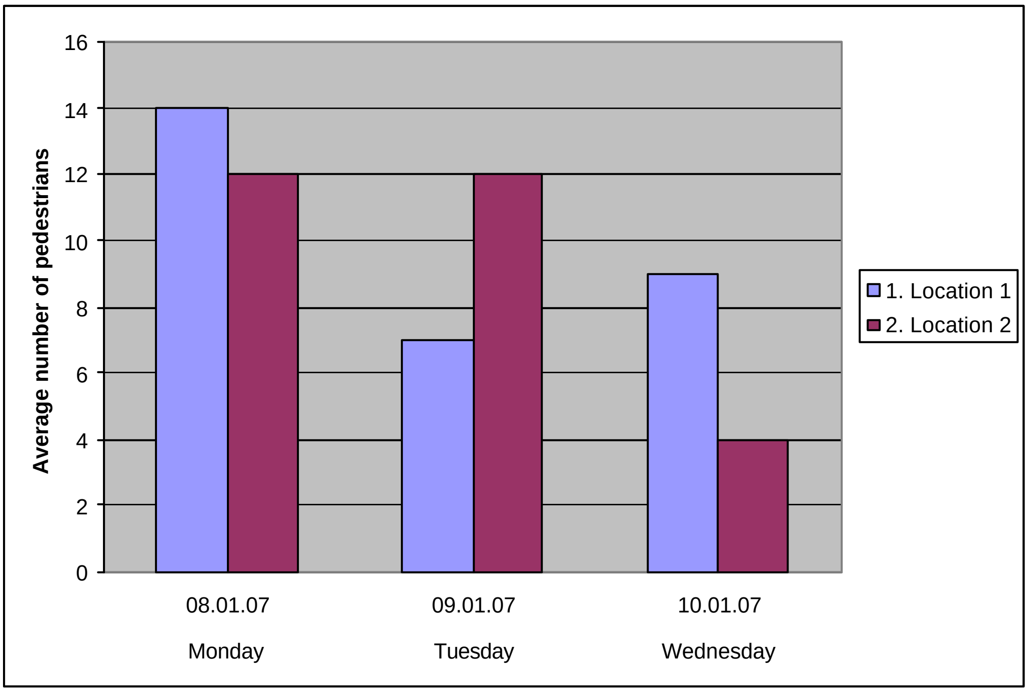
GOL.16 A pedestrian count was undertaken in Golborne in order to gain an understanding of pedestrian use in the area. Two count points were chosen: the junction of Heath Street/ High Street adjacent to Peter Kane Square (Location 1) and the junction of Corner Street and High Street (Location 2). The number of passing pedestrians in both directions was counted over a five minute period at three points during the day: once in the morning (between 10.00 and 11.00), once at midday (between 12.00 and 13.00) and once in the afternoon (between 14.00 and 15.00). This process was repeated over three days: a Monday (08.01.07), a Tuesday (09.01.07) and a Wednesday (10.01.07). The results were then indexed with the location having the highest level of footfall being afforded a top score of 100, and the subsequent indexed footfall being calculated accordingly. Figures GOL.5 and GOL.6 below show the results obtained through this process.

Figure GOL.5 Golborne pedestrian count (average number of pedestrians recorded)

Location	Date of count			Total Count	Total Index
	Monday 08.01.07	Tuesday 09.01.07	Wednesday 10.01.07		
1. Location 1	14	7	9	30	100
2. Location 2	12	12	4	28	92
TOTAL	**26**	**19**	**13**	**58**	**-**

Source: NEMS Market Research, 2007

Figure GOL.6 Golborne pedestrian count



GOL.17 Figure GOL.5 shows that over the three days the combined average number of pedestrians recorded was 58, which is relatively low when compared to other centres in Wigan Borough. Overall, an average of 30 people were recorded at Location 1 (the junction of Heath Street/ High Street adjacent to Peter Kane Square) which is slightly greater than the 28 recorded at Location 2 (the junction of Corner Street and High Street). Out of the three survey days, the Monday (08.01.07) was busiest with a total of 26 pedestrians counted, followed by Tuesday (09.01.07) when 19 pedestrians were recorded with Wednesday (10.01.07) recording the lowest number of pedestrians with 13 people counted.

GOL.18 The in-street visitors survey of Golborne revealed the following in respect to accessibility:

- Under half of visitors to Golborne (46%) had regular access to a car during the day, although this increased slightly (to 49%) during the evening/ night-time;
- Two-thirds of visitors to the town centre (66%) arrived on foot, with 23% arriving by car or van and 10% arriving via bus, minibus or coach;
- Most drivers (79%) parked their vehicle on-street, with 7% using Bank Street;
- Of those that drove, 83% did not have any difficulty locating a car parking space;
- The majority of visitors (54%) travelled for under five minutes to reach the centre, with a further 23% travelling for between six and ten minutes;
- Car parking provision in the centre was seen to be 'worse' or 'much worse' than that in other centres by 33% of visitors, whilst 34% indicated that they did not know either way and 20% considered car parking provision to be 'about the same' as in other centres; and
- Accessibility to Golborne by public transport was seen to be 'about the same' as other centres by 38% of visitors, with 20% stating that it was better in Golborne than in other centres and 23% that it was either 'worse' or 'much worse'. The remaining 21% stated that they did not know.

Perception of Safety and Occurrence of Crime

GOL.19 In terms of day-time safety in Golborne, most visitors indicated that this was 'about the same' in the town centre as in other centres which they visited. An additional 23% of visitors stated that this was either 'worse' or 'much worse' in Golborne compared to other centres. With regard to safety during the evening/ night-time 46% of visitors felt that this was either 'worse' or 'much worse' in Golborne than in other centres. Meanwhile 33% of visitors stated that evening/ night-time safety in

Golborne was 'about the same' as in other centres, and 20% indicated that they did not know either way.

Customer Views and Behaviour

GOL.20 In respect of customer views and behaviour, the on-street survey undertaken by NEMS Market Research indicated the following:

- 90% of respondents travelled to Golborne directly from home;
- The majority of visitors (82%) were not visitors to the local area;
- When asked what their main purpose of being in the centre was, the most popular responses were: to undertake food and grocery shopping (25%), to visit the bank/ building society/ Post Office (25%), and because of work/ school/ college (12%);
- 69% of visitors planned to stay in the centre for up to half an hour, with a further 15% planning to stay for up to two hours;
- 26% of visitors were planning to carry out their main food shop on the day of the survey. Of these, 81% visited the Golborne once a week or more for such purposes;
- Of those visitors who were not undertaking their main food shop on the day of the survey, 58% last visited Golborne for such purposes; and
- 44% of visitors stated that they visited the town centre 'about as frequently' today as they did five years ago. An additional 31% indicated that they visited the centre with less or much less frequently than before.

GOL.21 The in-street survey also required visitors to rate Golborne with respect to a number of different aspects. The following aspects were seen to be either 'worse' or 'much worse' in Golborne than in other centres which respondents used: choice of shops; quality of shops; range of services such as banks and other financial services; range and choice of pubs/ restaurants; leisure facilities; shopping environment; and events/ entertainments/ performances.

Environmental Quality

GOL.22 Environmental quality within Golborne is variable. Whilst many occupied units, particularly those on High Street, are well maintained and have attractive fascias, elsewhere some units, fast food and take away units in particular, employ steel-shutters to cover frontages during the day. Although understandable from a security viewpoint, this does serve to create a dead frontage during the day. In addition there is a proliferation of vacancies throughout the town centre, many of poor quality which detracts from the visual amenity of the town centre.

Figure GOL.7: Heath Street

GOL.23 As highlighted previously there is evidence of new paving along High Street which is an asset to the town centre. Peter Kane Square (Figure GOL.8), which is situated at the junction of Heath Street and High Street, provides an attractive area of public open space and is also well maintained, incorporating a clock tower as its centrepiece. CCTV is in operation throughout the town centre. As mentioned many vacancies are currently subject to redevelopment work which serves to detract from the visual amenity of the centre. WYG recognise that this is a temporary situation and the environmental quality of the town centre will benefit from such improvement works in the long-run.

Figure GOL.8: Peter Kane Square

Business Survey

GOL.24 As part of this Study WYG distributed a business survey to all traders located in Golborne Town Centre. Through this process a total of 132 surveys were delivered of which 27 were returned: providing a response rate of 20%. The business survey revealed that:

- Over half of traders (52%) had been operating in Golborne for over twenty years;
- Respondents comprised the following traders: Non-food retailers (39%), retail services (22%), food retailers (13%), leisure services (9%) and professional services (9%);
- Since they began trading, 63% of respondents indicated that trade had either 'grown moderately' or 'grown significantly';
- With respect to current business performance, half of traders (50%) were trading either 'very well' or 'well', with a further 46% trading 'moderately';
- 52% of respondents were owner occupiers, and the remaining 48% were leaseholders;
- 524 employees in total were employed by respondents: 75% of these were employed on a part-time basis;
- Local residents were relied upon by 72% of respondents as their primary source of business;
- 38% of respondents considered there to be an appropriate mix of shops and other non-retail uses in the centre, with a further 38% stating that there were too many non-retail uses. The remaining 24% indicated that there were not enough retail uses;
- Poor quality of the shopping centre environment was deemed by the highest proportion of respondents (20%) as being the biggest constraint on business performance;
- 38% of respondents had no plans to alter their business in any way over the next five years, although 24% planned to refurbish their existing floorspace over this time; and

- Businesses in Ashton-in-Makerfield were felt by the highest proportion of respondents (33%) to be their major competitor.

GOL.25 Retailers were asked about their perceptions of the town centre. In general most aspects were rated as being either 'average' or 'poor' by the majority of respondents. Areas noted as being 'poor' by a majority of respondents were as follows: the market (82%); public toilets (79%); marketing and promotion (62%); town centre events/ activities (56%) and occupier consultation on the town centre (56%). Popular ways of improving the town centre were recorded as being: town centre events/ activities (76%), greater town centre police presence (73%), more marketing and promotion (73%) and public transport improvements (69%).

Conclusions on Vitality and Viability

GOL.26 This assessment has shown Golborne to be struggling in terms of vitality and viability. Although the centre contains above average representation of retail services, all other categories of retail goods and services are below the national average with respect to the proportion of floorspace which they occupy. Furthermore the proportion of vacant units and vacant floorspace is significantly above the national average, and many vacancies located in the centre are of poor quality. Environmental quality in the town centre is variable. Notwithstanding these issues the centre is relatively accessible by a range of means of transport.

HINDLEY TOWN CENTRE

General Description of Hindley Town Centre

HIN.01 Hindley Town Centre lies three miles to the east of Wigan. Hindley borders the towns of Ince-in-Makerfield, Atherton and Westhoughton, and has an approximate population of 23,457 (2001 census). The town is located to the east of the M6 motorway between Wigan, St Helens, Bolton and Manchester. The town is close to the north of an important junction of the A577 (Wigan-Atherton road) and the A58 (Westhoughton - Ashton-in-Makerfield road).

HIN.02 Policy S1 of the replacement Wigan UDP identifies Hindley as a Town Centre. Hindley is a linear shopping centre running north to south along Market Street.

Diversity of Uses

HIN.03 Figures HIN.1 and HIN.2 illustrate the composition of uses in Hindley at 2006 and 2002. This is based on information provided by GOAD. The composition of the centre at 2006 has been compared to the latest GOAD national averages for UK town centres (at January 2007). A map of the area surveyed at 2006 is included in this report at **Appendix 7** however no similar map is available from 2002, so we are unable to tell whether the GOAD town centre boundary has changed significantly over the period. The floorspace figures shown are based on the building footprint at ground-floor level only.

Figure HIN.1 Retail Composition of Hindley Town Centre, 2006

Sector	No. of Outlets	% of Outlets		Floorspace (sq. m)	% of Floorspace	
		Hindley	GB		Hindley	GB
Convenience	10	7.35	8.46	7,386	33.82	13.72
Comparison	30	22.06	36.67	3,605	16.50	39.53
Retail Service	27	19.85	12.70	2,406	11.02	6.98
Leisure Services	28	20.59	20.88	4,905	22.46	22.51
Financial & Business Services	16	11.76	11.62	1,561	7.15	9.26
Vacant	25	18.38	9.67	1,979	9.06	8.00
TOTAL	**136**	**100**	**100**	**21,842**	**100**	**100**

Source: Experian GOAD (2006)

Figure HIN.2 Retail Composition of Hindley Town Centre, 2002

Sector	No. of Outlets	% of Outlets		Floorspace (sq. m)	% of Floorspace	
		Hindley	Change 02-06		Hindley	Change 02-06
Convenience	10	6.90	+0.45	1,997	11.51	+22.31
Comparison	36	24.83	-2.77	4,329	24.95	-8.45
Retail Service	24	16.55	+3.30	2,285	13.17	-2.15
Leisure Services	32	22.07	-1.48	5,388	31.05	-8.59
Financial & Business Services	11	7.59	+4.17	1,208	6.96	+0.19
Vacant	32	22.07	-3.69	2,146	12.37	-3.31
TOTAL	**145**	**100**	**-**	**17,353**	**100**	**-**

Source: Experian GOAD (2002)

HIN.04 The principal shopping area of Hindley is Market Street and Bridge Street. At 2006 7.4% of units in Hindley were in use for convenience purposes, which compares to a national average of 8.5%. Meanwhile 33.8% of retail floorspace was in use for convenience purposes, which compares to a figure of 13.7% nationally. The town centre is under provided in terms of convenience outlets, however there is a very high proportion of convenience floorspace. This sector is dominated by the Tesco supermarket on Cross Street which accounts for 5,550 sq m of floorspace, or 75.1% of total convenience floorspace. In fact, the main pull of the centre is the Tesco store. The majority of pedestrian flow at the time of the survey was towards the Tesco store. Also within the centre is a Kwik Save store on Ladies Lane which accounts for 1,230 sq m of floorspace, or 16.7% of total convenience floorspace. Other convenience traders in the centre are predominantly independents and include: two ‘butchers’; two ‘CTN retailers’; and two ‘bakers and confectioners’. An outdoor market operates in the town centre every Friday, providing additional convenience provision.

HIN.05 Figure HIN.2 indicates that at 2002 there were 10 convenience retailers in the town centre accounting for 1,997 sq m of retail floorspace. Over the period the number of convenience operators in Hindley has stayed constant at 10 units. However, the addition of the Tesco store to the town has greatly influenced the town centre's convenience floorspace. Thus, the relative proportion of retail floorspace for which convenience traders account has greatly increased by 22.3% between 2002 and 2006.

HIN.06 Comparison retailing in Hindley is under-represented when considered against the national average. Such traders occupy 22.1% of outlets, against a national average of 36.7%, and 16.5% of floorspace compared to a national average of 39.5%. The town contains a mixture of multiple and independent comparison traders, and the Friday market provided further provision, as well as the Tesco supermarket which sells non-food goods. Since 2002 the number of comparison units has declined by six, whilst comparison floorspace has decreased by 725 sq m.

HIN.07 Retail services, which comprise such uses as hairdressers, dry cleaners and petrol filling stations, account for 19.9% of outlets and 11% of floorspace in Hindley, which compares to a national average of 12.7% and 7% respectively. 'Health and beauty' traders are particularly dominant in this sector, accounting for 14 (or 51.9%) of all outlets. Importantly the town centre contains a Post Office on Worthington Street.

HIN.08 Hindley contains no stores which are in the top 20 national retailer, as identified by Focus. Since 2002 the number of retail service outlets has increased by three units, with retail floorspace in this sector increasing by 121 sq m.

HIN.09 Leisure services as defined by GOAD include uses such as restaurants, cafes, bookmakers and public houses. Hindley is slightly under-provided in this sector with both the proportion of outlets (20.6%) and the proportion of floorspace occupied (22.4%) being less than the national average (20.9% and 22.5% respectively). Fast-food and take away units are the most prolific, occupying 10 units or 7.4% of total units in the centre, against a national average for this type of trader of 5% at 2007. Other well represented traders include public houses (seven units) and clubs (five units). Between 2002 and 2006 the number of leisure service traders decreased by four units and the proportion of floorspace by 483 sq m.

HIN.10 In terms of the proportion of retail units occupied, financial and business services are well-provided in Hindley, occupying 11.8% of all outlets compared to a figure of 11.6% nationally. However, with regard to the proportion of floorspace which they occupy, financial and business services account for 7.2% of total floorspace which is below the national average for UK town centres of 9.3%. As such the town centre is under-provided for in this regard. A number of well-known national multiples are present in the town centre in this sector, including: Lloyds TSB; the Royal Bank of Scotland; and the Nationwide Building Society. Comparing the composition of Hindley at 2002 and 2006, the number of financial and business service outlets has increased by five units, whilst the amount of floorspace has increased by 353 sq m.

HIN.11 Overall, comparing the town centre at 2002 and 2006 using figures HIN.1 and HIN.2, the total number of retail units in the town centre, as defined by GOAD, has declined by nine. This equates to a decline of 6.2%. Conversely in terms of the total amount of retail floorspace, this has increased by 4,487, an increase of 25.9%.

HIN.12 Hindley does not just provide a role in the provision of retail goods and services to the population which it serves. It also provides a number of additional services to local people, including a community centre and three dental surgeries. In addition a number of residential dwellings are located within the GOAD town centre boundary.

Retailer Requirements

HIN.13 Figure LEI.3 sets out retailer requirements within Hindley Town Centre as derived from the Focus Database (April 2007). The list should be treated with a degree of caution as some retailers may put forward their requirements on the Database whilst not having an active desire to locate there. Additionally, the list includes retailers who are already present in the town but are seeking new premises. Furthermore a single retailer may express more than one requirement in a town centre for different sizes of units. Nevertheless it does serve as a useful indicator of the level of demand a centre is experiencing.

Figure HIN.3: Summary of Retailer Requirements within Hindley Town Centre, 2007

	Number of Requirements	Minimum Floorspace (sq. m)	Maximum Floorspace (sq. m)
Convenience	1	1,000	2,500
Comparison	0	0	0
Service	1	450	1,200
TOTAL	**2**	**1,450**	**3,700**

Source: Focus Report (March 2007) - uses falling within specific retail trade categories from Experian GOAD definitions

HIN.14 Figure HIN.3 indicates that at April 2007 there are two retailers seeking representation within Hindley, collectively requiring up to 3,700 sq m (gross) in retail floorspace. There is one convenience retailer, Jack Fulton, requiring between 1,000 sq m and 2,500 sq m of floorspace. There is also one service retailer, Cheque Centres, which requires between 450 sq m and 1,200 sq m of floorspace. There are no comparison retailers seeking representation in Hindley.

HIN.15 It is evident from examining Focus data that the current level of requirements (two) is a low level for Hindley.

Street Level Vacancies

HIN.16 The proportion of vacant units within any centre can provide a good indication of how the town centre is performing. However, care should be taken when interpreting figures. Vacancies can occur for positive as well as negative reasons e.g. the opening of a new retail centre elsewhere in a town may draw retailers from older properties or more peripheral areas of the town. Vacant units will be found in even the strongest town centre and are simply an indicator of the level of demand in a centre. For example some properties may lay vacant because they are poorly maintained, unsuited to modern retailing requirements or simply not being actively marketed. Conversely a low vacancy rate does not necessarily mean that a centre is performing well. For example, if there is a proliferation of charity shops and other low value uses within a town centre it may be a sign of decline, particularly where these uses are located in prime locations. Despite these issues, it is still a useful indicator of town centre performance.

HIN.17 Figure HIN.1 illustrates that at 2006 there were 25 vacant retail units in the town centre, constituting a floorspace of 1,979 sq m. This represents 18.4% of all outlets and 9.1% of floorspace, compared to respective national averages of 9.7% and 8%. This indicates a high number of small vacant properties in the town centre. The vacancies are not attractive, most are old properties that have obviously been vacant for some time. From examining the GOAD plan of Hindley it can be seen that the majority of vacant units are on Market Street (fifteen) and Bridge Street (seven). There is also one vacant unit each on Chapel Green Road, Cross Street and Ladies Lane. Thus, there are a significant proportion of vacancies dispersed throughout the centre; however there are large concentrations on Market Street which is in the Principal Shopping Area. These concentrations of vacancies detract from one's enjoyment of the centre. It is notable that since the time of the GOAD survey in 2006 some units have since been occupied, suggesting that the current vacancy rate is lower than suggested in this survey. Figure HIN.2 indicates that since 2002 the number of vacant units has declined significantly by seven units (or 21.9%), whilst the amount of vacant floorspace has fallen by 167 sq m (or 7.8%) over the 2002 to 2006 period.

Commercial Rents and Yields

HIN.18 Unfortunately due to the modest size of Hindley there is no published data on rents or yields achieved. However Donaldson's estimate prime Zone A rents in the town centre to be approximately £120/ sq m.

Accessibility

HIN.19 Hindley is located to the east of the M6 motorway between Wigan, St Helens, Bolton and Manchester. The town is set close to the north of an important junction of the A577 (Wigan-Atherton Road) and the A58 (Westhoughton - Ashton-in-Makerfield road). The main road running through the centre (Market Street) is busy and there are few dedicated crossing points. There is plenty of free parking in the centre, both on-street and on surface level car parks. There is also parking available at the Tesco store.

HIN.20 The town centre also benefits from adequate accessibility by public transport. Buses run through Hindley connecting it with Atherton, Leigh, Tyldesley and Wigan. In addition, Hindley's proximity to the modern motorway network and train lines to Manchester and Wigan (where connections to the West Coast Mainline can be made) and affordable housing make it increasingly attractive for commuters. A pedestrian crossing is also provided (Figure HIN.4).

Figure HIN.4: Pedestrian crossing in Hindley

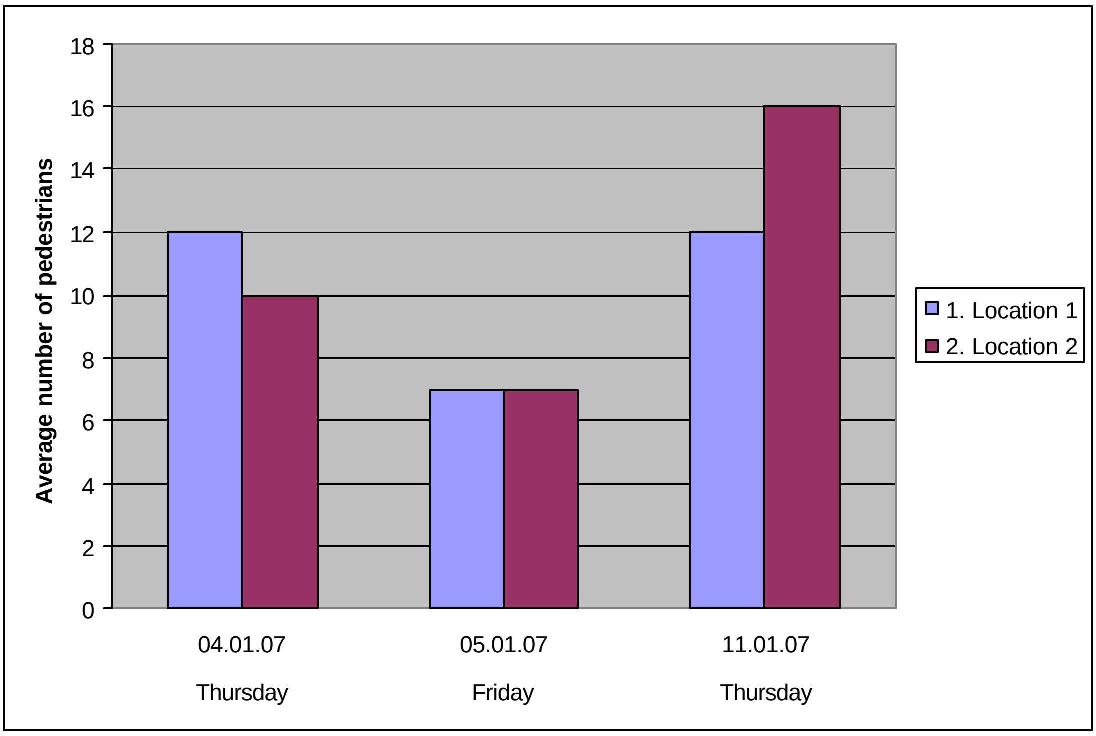
HIN.21 As part of the health check NEMS Market Research have undertaken a pedestrian count of movement around Hindley Town Centre. Two count points were identified: Market Street immediately north of Mill Street (Location 1) and Market Street outside the library (Location 2). The number of passing pedestrians in both directions was counted over a five minute period at three points during the day: once in the morning (between 10.00 and 11.00), once at midday (between 12.00 and 13.00) and once in the afternoon (between 14.00 and 15.00). This process was repeated over three days, two Thursdays (04.01.07) and a Friday (05.01.07). The results were then indexed with the locations showing the highest level of footfall being afforded a top score of 100, and the subsequent indexed footfall being calculated accordingly. Figures HIN.5 and HIN.6 below show the results obtained through this process.

Figure HIN.5 Hindley pedestrian count (average number of pedestrians recorded)

Location	**Date of count**			**Total Count**	**Total Index**
	Thursday 04.01.07	**Friday 05.01.07**	**Thursday 11.01.07**		
Location 1	12	7	12	30	91
Location 2	10	7	16	33	100
TOTAL	**22**	**14**	**28**	**63**	**-**

Source: NEMS Market Research, 2007

Figure HIN.6 Hindley pedestrian count



HIN.22 The pedestrian count data indicates that Thursday (11.01.07) was the busiest of the three days in terms of footfall, with 28 pedestrians recorded in total for both count points, compared to 22 pedestrians on the first Thursday (04.01.07) and 14 on the Friday (05.01.07). Location 2 recorded the greatest number of pedestrians overall with a total count for the three survey days of 33 persons, compared to 30 persons counted at Location 1.

HIN.23 In respect of accessibility, the on-street survey undertaken by NEMS identified the following:

- 48% of visitors to Hindley had regular access to a car for personal use during the day and during the evening/night-time;
- The most common method of arriving in the centre was on foot (47%). This was followed by a car or van (28%) and by bus, minibus or coach (17%);
- Of those that drove the most popular place to park was in Tesco car park, with (57%) of drivers leaving their vehicle here. 24% of

drivers parked on-street and 14.4% of people parked on either Cross Street, King Street or Progress Street;

- The majority of drivers (95%) had no difficulty in obtaining a car parking space on the day of the interview;
- 48% of people travelled for less than five minutes to reach Hindley, 30% travelled for between six and ten minutes and 13% for between eleven and fifteen minutes;
- Car parking provision was deemed to be 'about the same' in Hindley compared to other centres by 33% of visitors, although 20% considered it to be 'better' than in other centres and 11.7% considered that it was 'worse'; and
- Accessibility by public transport was considered by 37% of visitors to Hindley to be 'about the same' as other centres, with 22% indicating that it was 'better' in Hindley than in other centres which they visited, and 12% indicated that it was 'worse'.

Perception of Safety and Occurrence of Crime

HIN.24 In terms of shopper safety during the day-time, the majority of visitors interviewed through the in-street survey (63%) deemed this to be 'about the same' as in other centres which they visited. However a significant 12% considered day-time safety in Hindley to be 'worse' than in other centres. With respect to safety during the evening/night-time 28% indicated that this was 'worse' than other nearby centres. 25% of respondents thought night-time safety was much worse, and 23% thought night-time safety was 'about the same' as other centres.

Customer Views and Behaviour

HIN.25 The in-street survey undertaken by NEMS Market Research indicated the following in respect of visitors to Hindley:

- The vast majority of visitors to Hindley (92%) had travelled to the centre directly from home;

- Most of those interviewed (75%) indicated that they were not a visitor to the local area;
- The most popular responses recorded when visitors were asked why they were in Hindley were: to undertaken food and grocery shopping (43%), to visit the bank/building society/Post Office (15%) and due to work/school/college (8%);
- Half of visitors (53%) planned to stay in the centre for up to half an hour, with a further 35% planning to stay for up to two hours;
- 50% of visitors indicated that they planned to undertake their main food shop on the day of the survey. Of these, 56.7% stated that they visited Hindley daily for such purposes; and
- 93% of visitors did not plan to purchase clothing and footwear goods on the day of the survey, with the majority of these people (48%) last visiting Wigan for such purposes.
- When visitors were asked how often they visited the centre today compared to five years ago, 63.3% stated that they visited Hindley 'about as frequently'. However, a significant 15% visited 'less frequently than before', whilst 10% visited 'more frequently than before'.

HIN.26 Visitors were asked to rate the centre on a number of aspects, compared to other shopping centres which they visited. The aspects identified by more than half of respondents as being 'worse' or 'much worse' in Hindley than in other centres were as follows: choice of shops; quality of shops; the shopping environment; and cleanliness. However, the range of services available was seen to be 'about the same' as other centres according to the majority of visitors.

Environmental Quality

HIN.27 Hindley is predominantly a linear centre which is dominated by the Tesco supermarket on land between Cross Street and Darby Lane (Figure HIN.7). Although none of the centre is pedestrianised pavements in this area are wide, and pedestrian crossings are provided. The streets are clean with no evidence of litter, whilst in general; shop units are maintained to a good standard creating an attractive shopping environment. Street furniture present in this area includes lighting, bins and limited benches and also flower arrangements are located on Castle Hill Road in the vicinity of one of the places of worship in the area. Vacancies are predominantly located on side streets off Market Street (Figure HIN.8), which are of mixed quality.

Figure HIN.7: The Tesco at Hindley


Figure HIN.8: Market Street

Business Survey

HIN.28 As part of this assessment 137 surveys were distributed to existing businesses within Hindley. A total of 47 responses were returned providing a response rate of 34%. The survey revealed the following:

- Of the businesses who responded to the survey, 37% had been trading in the centre for over twenty years, whilst 24% had been trading for between ten to twenty years. Notably, only three businesses had been trading for one year or less;

- Respondents to the survey comprised 30% professional services, 22% retail services; 15% comparison retailers, 13% leisure services and 11% convenience retailers;
- 52% of respondents considered that trade has either grown moderately or grown significantly since they began trading in Hindley, with 13% considering trade to have remained largely static;
- Over half of respondents (56%) believed their business to be trading either well or very well;
- The majority of respondents (63%) owned their premises;
- Respondents relied primarily on local residents, highlighted by 67% of respondents as their main source of business;
- Over half of respondents (51.3%) deemed there to be too many non-retail uses in the town centre;
- The poor quality of the town centre shopping environment was considered by the highest proportion of respondents (20%) to be the main constraint on current business performance. This was followed by the lack of day visitors/tourists to the town (15%) and inadequate customer car parking (12%);
- 50% of respondents had no plans to alter their business in any way over the next five years, while 29% planned to refurbish their existing floorspace; and
- The biggest competitor to business in Hindley was seen to be Wigan.

HIN.29 When asked to rate a number of different aspects of the town centre, the quantity of parking spaces was seen to be good by 24% of respondents, whilst 88% considered the market in Hindley to be poor and 85% considered the public toilets present in Hindley to be poor. In terms of improving Hindley, 89% of respondents considered that a greater police presence would have a positive impact. In addition, 84% indicated that more public seating/ litter bins would improve Hindley and 83% believed that enhancing the cleanliness of paths/ public spaces in the town centre would improve Hindley.

Conclusions on Vitality and Viability

HIN.30 This study has shown Hindley to have some problems in terms of its health. On a positive note accessibility to Hindley was seen to generally be good, whilst the retail service and the financial and business service sectors in the town were shown to be strong when compared to the national average. Although the town centre contains a wide array of shops and services, retiling is dominated by the Tesco supermarket. In addition the convenience sector, comparison sector, the leisure service sector and vacancies in the town centre are below the UK national average. However, vacancy rates in Hindley have decreased in the past few years.

LEIGH TOWN CENTRE

Leigh's position within the Regional Hierarchy

LEI.01 Figure LEI.1 below outlines Leigh's position in the sub-region based on the Management Horizons Europe's (MHE) UK Shopping Index. This index ranks 1,672 shopping centres in the UK using a weighted scoring system which takes into account multiple retailers and anchor stores present in each centre. The index includes stand alone malls, retail warehouse parks and factory outlet centres in addition to town centres.

Figure LEI.1: The Sub-Regional Shopping Hierarchy

Centre	MHE score	Rank 2003-2004	Rank 2000-2001	Change in Rank
Manchester	354	2	3	+1
Liverpool	259	14	13	-1
Preston	201	34	53	+19
Bolton	166	64	65	+1
Warrington	151	83	91	+8
St Helens	146	92	111	+19
Wigan	131	111	121	+10
Leigh	**63**	**307**	**331**	**+24**
Skelmersdale	42	462	398	-64
Farnworth	35	546	535	-11
Swinton	32	589	572	-17
Robin Park Retail Park, Wigan	31	602	-	-
Ashton-in-Makerfield	16	1120	880	-240

Management Horizons Europe: UK Shopping Index (2003/2004)

LEI.02 Based on the MHE scoring system Leigh achieves a score of 63. This places it 307th nationally out of the 1,672 shopping destinations surveyed. When compared to other centres in the sub-region, as would be expected it is below the larger centre of Wigan (ranked 111th) but above Skelmersdale (462nd), Robin Retail Park, Wigan (602nd) and Ashton-in-Makerfield (1,120th). In the 2000- 2001 period Leigh was ranked 331st, which means that it has experienced an increase of 24 places between 2000/2001 and 2003/2004. This is a significant increase and demonstrates that the town centre has managed to strengthen its retail offer in comparison with nearby competing centres. Indeed the 24 place rise experienced by Leigh is the greatest rise in position recorded by any of the destinations contained in Figure LE1.1.

General Description of Leigh Town Centre

LEI.03 Leigh is a town in the south-east of the Borough. It has a long industrial past with a history of manufacturing in the 18^{th} century and coal mining in the second half of the 19^{th} century. It lies some nine miles west of the City of Manchester and ten miles south-east of the town of Wigan. Leigh has a total population of around 44,122 according to the 2001 Metropolitan Borough of Wigan census survey. It is situated on the A572 close to the A580 which leads to the M6 and M62.

LEI.04 Policy S1 of the Replacement Wigan UDP states that Leigh, along with Wigan is identified as a Main Town Centre within the Borough. Leigh is a linear shopping centre running east to west along Railway Road and Bradshawgate.

LEI.05 The principal shopping area within the town centre includes the market, Bradshawgate and parts of Kingsway (around the crossroads with Railway Road).

Diversity of Uses

LEI.06 Figures LEI.2 and LEI.3 demonstrate the composition of uses in Leigh at 2006 and 2002. This is based on information provided by GOAD. The composition of the centre at 2006 has been compared to the latest GOAD national averages for UK town centres (at January 2007). A map of the area surveyed at 2006 is included in this report at **Appendix 7**, although unfortunately no map of the 2002 survey area is available. The floorspace figures shown are based on the building footprint at ground-floor level only.

Figure LEI.2 Retail Composition of Leigh Town Centre, 2006

Sector	No. of Outlets	% of Outlets		Floorspace (sq. m)	% of Floorspace	
		Leigh	GB		Leigh	GB
Convenience	27	8.77	8.46	7,367	11.46	13.72
Comparison	120	38.96	36.67	24,406	37.98	39.53
Retail Service	36	11.69	12.70	3,930	6.12	6.98
Leisure Services	67	21.75	20.88	17,744	27.61	22.51
Financial & Business Services	32	10.39	11.62	5,686	8.85	9.26
Vacant	26	8.44	9.67	5,128	7.98	8.00
TOTAL	**308**	**100**	**100**	**64,261**	**100**	**100**

Source: Experian GOAD (2006)

Figure LEI.3 Retail Composition of Leigh Town Centre, 2002

Sector	No. of Outlets	% of Outlets		Floorspace (sq. m)	% of Floorspace	
		Leigh	Change 03-06		Leigh	Change 03-06
Convenience	30	9.93	-1.16	9,262	15.05	-3.59
Comparison	116	38.41	+0.55	22,724	36.93	+1.05
Retail Service	32	10.60	+1.09	3,642	5.92	+0.20
Leisure Services	56	18.54	+3.21	11,278	18.33	+9.28
Financial & Business Services	28	9.27	+1.12	5,593	9.09	-0.24
Vacant	40	13.25	-4.81	9,039	14.69	-6.71
TOTAL	**302**	**100**	**-**	**61,539**	**100**	**-**

Source: Experian GOAD (2002)

LEI.07 At 2006 8.8% of units in Leigh were in use for convenience purposes, which compares to a national average of 8.5%. Meanwhile 11.5% of retail floorspace is in use for convenience purposes, which compares to a figure of 13.7% nationally. The town centre is reasonably well provided by convenience provision. This sector is dominated by three main supermarkets: Lidl on Spinning Jenny Way; Netto on Vicarage Square; and Iceland on Bradshawgate. It should be noted however that the Lidl supermarket is actually outside town centre as defined by the Wigan UDP, although it has been included in the GOAD analysis of town centre floorspace. However, it has been left in the analysis of retail floorspace to allow comparison with the GOAD data from 2002. In total, these three stores account for 2,800 sq. m of floorspace, or 38% of total convenience floorspace. Other convenience traders in the centre are: Heron frozen food on Bradshawgate; Farmfoods in the Spinning Gate Shopping Centre; and a number of independents including eight 'CTN' (confectionary, tobacco and news) retailers, seven 'bakers and confectioners' and two 'butchers'. Leigh has an indoor market and an outdoor market which both operate Monday to Saturday, providing additional convenience provision.

LEI.08 Figure LEI.2 indicates that at 2002 there were 30 convenience retailers in the town centre accounting for 9,262 sq m of retail floorspace. As such over the period the number of convenience operators in Leigh has declined by three units (or 10%) and by 1,895 sq m. The relative proportion of retail floorspace for which convenience traders account has decreased between 2002 and 2006.

LEI.09 Comparison retailing in Leigh is well represented when considered against the national average. Such traders occupy 39% of outlets against a national average of 36.7%, and 38% of floorspace compared to a national average of 39.5%. The town contains a mixture of multiple and independent comparison traders, and the indoor and outdoor markets provide further provision. Since 2002 the number of comparison units has increased by four, whilst comparison floorspace has increased by 1,682 sq m.

LEI.10 Retail services, which comprise such uses as hairdressers, dry cleaners and petrol filling stations, account for 11.7% of outlets and 6.1% of floorspace in Leigh, which compares to a national average of 12.7% and 7% respectively. 'Health and beauty' traders are particularly dominant in this sector, accounting for 16 (or 44.4%) of all outlets. Importantly the town centre contains a large Post Office on Silk Street. Leigh has eight retailers present in the top 20 national retailers, as identified by Focus. These include: the Boots Store on Bradshawgate; the Argos store in the Spinning Gate Shopping Centre; and the Woolworths store also on Bradshawgate. Since 2002 the number of retail service outlets has increased by four units, with retail floorspace in this sector increasing by 288 sq m.

LEI.11 Leisure services as defined by GOAD include uses such as restaurants, cafes, bookmakers and public houses. Leigh has good provision in this sector with both the proportion of outlets (21.8%) and the proportion of floorspace occupied (27.6%) being above the national average (20.9% and 22.5% respectively). Fast-food and take away units are the most prolific, occupying 23 units or 7.5% of total units in the centre, against a national average for this type of trader of 5.0% at 2007. Other well represented traders include public houses (fourteen units) and cafes (nine units). Between 2002 and 2006 the number of leisure service traders has increased by eleven units and the proportion of floorspace by 6,466 sq m.

LEI.12 In terms of the proportion of retail units occupied, financial and business services are under-provided in Leigh, occupying 10.4% of all outlets compared to a figure of 11.6% nationally. Likewise, with regard to the proportion of floorspace which they occupy, financial and business services account for 8.9% of total floorspace which is below the national average for UK town centres of 9.3%. As such the town centre is under-provided in this regard. A number of well-known national multiples are present in the town centre in this sector, including: Abbey; Barclays Bank; Bradford and Bingley; HSBC; Halifax; Lloyds TSB; Nat West; the Royal Bank of Scotland; and the Yorkshire Building Society. Comparing the composition of Leigh at 2002 and 2006, the number of financial and business service outlets has increased by four units, whilst the amount of floorspace has increased by 92 sq m.

LEI.13 Overall, comparing the town centre at 2002 and 2006 using Figures LEI.2 and LEI.3, the total number of retail units in the GOAD defined town centre has increased by six. This equates to an increase of 2.0%. Additionally, in terms of the total amount of retail floorspace this has increased by 2,722 sq m, a rise of 4.4%.

LEI.14 Leigh does not just provide a role in the provision of retail goods and services to the population which it serves. It also provides a number of additional services to local residents, including three dental surgeries and two doctor's surgeries. A number of residential dwellings are also located within the GOAD town centre boundary.

LEI.15 It should also be noted that a major development in the urban area of the town (but outside of the town centre) is gradually taking shape with the development of the Leigh Sports Village, which will include a 10,000 capacity stadium to be shared by Leigh RMI and Leigh Centurions. There will also be a new athletics arena for Leigh Harriers athletics club, new facilities for Leigh East Amateur Rugby League Club, a new college campus along with leisure and business facilities for the community.

Unit Sizes

LEI.16 Figure LEI.4 illustrates the overall size of units in Leigh in comparison with the national average at 2006, according to GOAD. However, it is important to note that this refers to units present in the town centre as a whole and therefore includes non-retail units which were excluded from the diversity of uses analysis above.

Figure LEI.4: Size of Units

Size of Unit (ground floor area)	Number of units	Proportion of Total (%)	
		Leigh	**GB**
Under 1,000 sq. ft	144	42.11	39.08
1,000- 2,499 sq. ft	127	37.13	39.63
2,500- 4,999 sq. ft	37	10.82	12.63
5,000- 9,999 sq. ft	19	5.56	5.08
10,000- 14,999 sq. ft	8	2.34	1.49
15,000- 19,999 sq. ft	3	0.88	0.68
20,000- 29,999 sq. ft	3	0.88	0.67
Above 30,000 sq. ft	1	0.29	0.75
Total	**342**	**100**	

Source: Experian GOAD (2006)

LEI.17 It is evident from Figure LEI.4 that Leigh Town Centre contains units in every size-band used by GOAD. Units less than 1,000 sq. ft are the most prolific, accounting for 42.1% of all units compared to a national average of 39.1%. The proportion of all other units, expect for those above 30,000 sq. ft, are either above the national average or only marginally below it, indicating that the centre provides a wide choice of accommodation for traders and is not deficient in any size of units. Notwithstanding this Leigh contains just one large unit above 30,000 sq. ft which accounts for 0.3% of all units, somewhat below the national average of 0.8%.

Retailer Requirements

LEI.18 Figure LEI.5 sets out retailer requirements within Leigh Town Centre as derived from the Focus Database (March 2007). The list should be treated with a degree of caution as some retailers may put forward their requirements on the Database whilst not having an active desire to locate there. Additionally, the list includes retailers who are already present in the town but are seeking new premises. Furthermore a single retailer may express more than one requirement in a town centre for different sizes of units. Nevertheless it does serve as a useful indicator of the level of demand a centre is experiencing.

Figure LEI.5: Summary of Retailer Requirements within Leigh Town Centre, 2007

	Number of Requirements	Minimum Floorspace (sq. m)	Maximum Floorspace (sq. m)
Convenience	1	93	232
Comparison	9	3,544	6,513
Service	6	775	3,036
TOTAL	**16**	**4,412**	**9,781**

Source: Focus Report (March 2007) - uses falling within specific retail trade categories from Experian GOAD definitions

LEI.19 Figure LEI.5 indicates that at March 2007 there are sixteen retailers seeking representation within Leigh, collectively requiring up to 9,781 sq m (gross) in retail floorspace. Comparison traders account for the highest number of requirements in outlets terms (nine) as well as floorspace; 6,513 sq m, or 66.6% of the total floorspace sought. A full list of requirements is included in this report at **Appendix 8**, and traders include First Choice Holidays, McDonalds Restaurants, Pets at Home and TJ Hughes.

Street Level Vacancies

LEI.20 The proportion of vacant units within any centre can provide a good indication of how the town centre is performing. However, care should be taken when interpreting figures. Vacancies can occur for positive as well as negative reasons e.g. the opening of a new retail centre elsewhere in a town may draw retailers from older properties or more peripheral areas of the town. Vacant units will be found in even the strongest town centre and are simply an indicator of the level of demand in a centre. For example some properties may lay vacant because they are poorly maintained, unsuited to modern retailing requirements or simply not being actively marketed. Conversely a low vacancy rate does not necessarily mean that a centre is performing well. For example, if there is a proliferation of charity shops and other low value uses within a town centre it may be a sign of decline, particularly where these uses are located in prime locations. Despite these issues, it is still a useful indicator of town centre performance.

LEI.21 Figure LEI.2 illustrates that at 2006 there were 26 vacant retail units in the town centre, which occupied a floorspace of 5,128 sq m. This represented 8.4% of all outlets and 8.0% of floorspace, compared to respective national averages of 9.7% and 8.0%. This indicates the presence of a low number of vacant properties in the town centre. From examining the GOAD plan of Leigh it can be seen that Railway Road (eight units) and Bradshawgate (seven units) have the highest number of vacant units within the town centre. The eleven other vacant units are in various other areas of the town centre, without any distinct cluster patterns. It is notable that since the time of the GOAD survey in 2006 some units have since been occupied, suggesting that the current vacancy rate is lower than that suggested in this survey. Since 2002 figure LEI.2 indicates that the number of vacant units has declined significantly by fourteen units (or 35%) over the 2002 to 2006 period.

Commercial Rents and Yields

LEI.22 Zone A rents (the rental value of the first six metres depth of floorspace in retail units from the shop window) reflects retailers' perception of the town centre. As retailers consider rent to reflect the margin between turnover and operational costs (plus profit), the better the trading prospects the higher the rent that the operator will be willing to pay.

LEI.23 Table LEI.6 below records the changes in prime pitch Zone A rents in Leigh Town Centre over the period relative to other centres in the sub-region.

Figure LEI.6 Prime Pitch Zone A Rents (£/sq m)

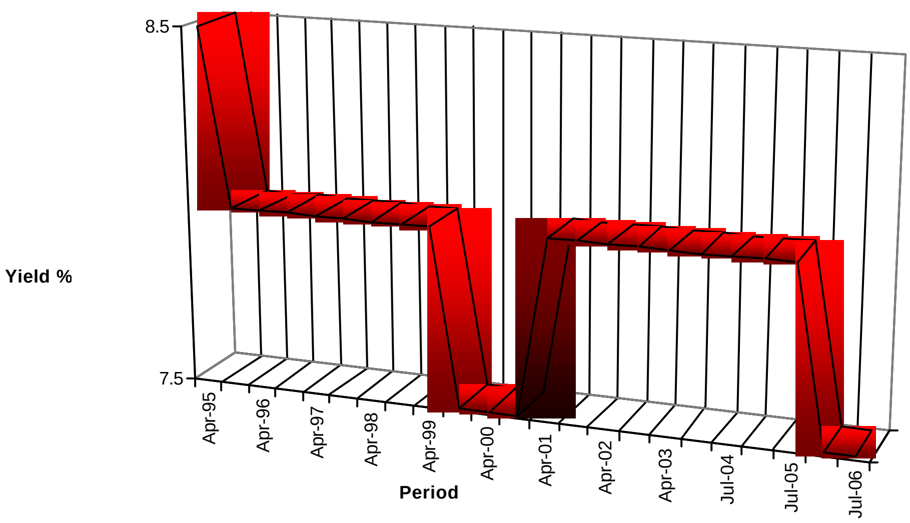
Centre	June '97	June '98	June '99	June '00	June '01	June '02	June '03	June '04	June '05	June '06	%
Leigh	**377**	**377**	**377**	**377**	**377**	**377**	**431**	**431**	**431**	**538**	**43**
Runcorn	431	431	431	431	592	592	646	646	646	646	50
St Helens	807	915	969	1076	1076	1076	1076	1076	1076	1076	33
Warrington	1130	1130	1184	1399	1507	1561	1561	1561	1561	1561	38
Widnes	323	323	484	484	484	484	538	538	700	700	117
Wigan	754	754	754	807	915	915	969	969	969	1130	50

LEI.24 Zone A rents for Leigh Town Centre have been recorded since June 1997 when they were £377/sq m. Since then, Zone A rents have risen to £538/sq m at June 2006. This represents a 30% increase over the period. When compared to the other centres included in LEI.5, Runcorn, St Helens, Warrington, Widnes and Wigan all recorded higher overall Zone A rents. In addition, the increase in rents experienced in Leigh is reasonably low when compared to the centres above. However the work undertaken by Donaldson's place town centre rents at considerably higher than this at up to £753/ sq m in the prime location of Bradshawgate.

LEI.25 A 'yield' represents the relationship between the rental income that a property is likely to command and its capital value, expressed as a percentage. Town centre yields broadly represent the market's assessment of the risk attached to investing in a particular centre; the higher the yield, the greater the risk involved in investment. Yields provide a simple bench mark which the property market uses to assess the comparative attractiveness of different shopping centres. Many considerations determine the yield an investor will require for a particular property, including: the physical condition of the building; the potential for rental growth; the certainty of income; lease arrangement; and the range of uses to which the building can be put.

LEI.26 Figure LEI.7 shows the yields recorded in Leigh since April 1995 based on the information recorded by the Valuation Office Agency.

Figure LEI.7 Retail Yields in Leigh



Apr-95	Oct-95	Apr-96	Oct-96	Apr-97	Oct-97	Apr-98	Oct-98	Apr-99	Oct-99	Apr-00	Oct-00	Apr-01	Oct-01	Apr-02	Oct-02	Apr-03	Jan-04	Jul-04	Jan-05	Jul-05	Jan-06	Jul-06
8.5	8	8	8	8	8	8	8	8	7.5	7.5	7.5	8	8	8	8	8	8	8	8	8	7.5	7.5

Source: Valuation Office Agency (VOA): Property Market Report (PMR), July 2006.

LEI.27 The information detailed in LEI.6 shows that since April 1995 yields have generally fluctuated between the 8% and 7.5% mark. Yields peaked at 8.5% in April 1995. From April 1995 to April 1999 yields remained constant at 8%. From October 1999 to October 2000 yields dropped to 7.5% before rising back to 8% in April 2001. Yields stayed at 8% until July 2005 before dropping to 7.5% in January 2006, at which yields remain. The yield of 7.5% in January 2006 was the lowest ever recorded level, indicating improved investor confidence in the town centre. However, the situation will need to be carefully monitored.

Accessibility

LEI.28 Leigh is situated on the A572 which connects to Wigan to the north west and Ashton-in-Makerfield to the south west. The A579 is close, connecting it to Atherton to the north and Bolton to the north east. The town centre has easy access to the M62, M1 and M6 via the A579. The Bridgewater Canal was extended from Worsley to the middle of Leigh in 1795, and in 1819 the Leigh branch canal was cut from the Leeds-Liverpool Canal at Poolstock, Wigan to meet the Bridgewater at Leigh Bridge, giving access from Leigh to all parts of Lancashire, Yorkshire and the Midlands.

LEI.29 There are a number of car parks in Leigh, including the following: Spinning Gate car park (314 spaces); Bengal Street multi-storey car park (158 spaces); Doctors Nook car park (89 spaces); Lord Street car park (46 spaces); Church Street car park (34 spaces); and the library/Town Hall car park (17 spaces). Car park charges vary depending on the length of stay, i.e. up to 3 hours (80p), 3 to 4 hours (£1.50), 4 to 6 hours (£2.70) and over 6 hours (£4.30).

LEI.30 The town centre also benefits from good accessibility by public transport. There is a large bus station which is the town's main public transport link. Buses connect Leigh with neighbouring centres such as Ashton-in-Makerfield, Hindley, Tyldesley, Bolton and Manchester. Previous railway stations at Leigh have closed, so the nearest railway station is at Atherton, three miles to the north.

LEI.31 The principal Shopping Area of Leigh is pedestrian friendly and provides a safe shopping environment. Pavements are wide and well maintained, and pedestrian crossings are provided throughout. Some of the town centre is also pedestrianised (Figure LEI.8 below).

LEI.32 As part of the health check NEMS Market Research have undertaken a pedestrian count of movement around Leigh Town Centre. Four count points were identified: Bradshawgate outside Boots (location 1), Spinning Gate Centre in and out at Bus Station (location 2), Market Square in and out at Spinning Gate Centre (location 3) and Bradshawgate outside Woolworths (location 4). The number of passing pedestrians in both directions was counted over a five minute period at three points during the day: once in the morning (between 10.00 and 11.00), once at midday (between 12.00 and 13.00) and once in the afternoon (between 14.00 and 15.00). This process was repeated over five days: Tuesday (02.01.07); Thursday (04.01.07); Friday (05.01.07); Saturday (06.01.07); and Monday (08.01.07). The results were then indexed with the location having the highest level of footfall being afforded a top score of 100, and the subsequent indexed footfall being calculated accordingly. Figures LEI.9 and LEI.10 below show the results obtained through this process.

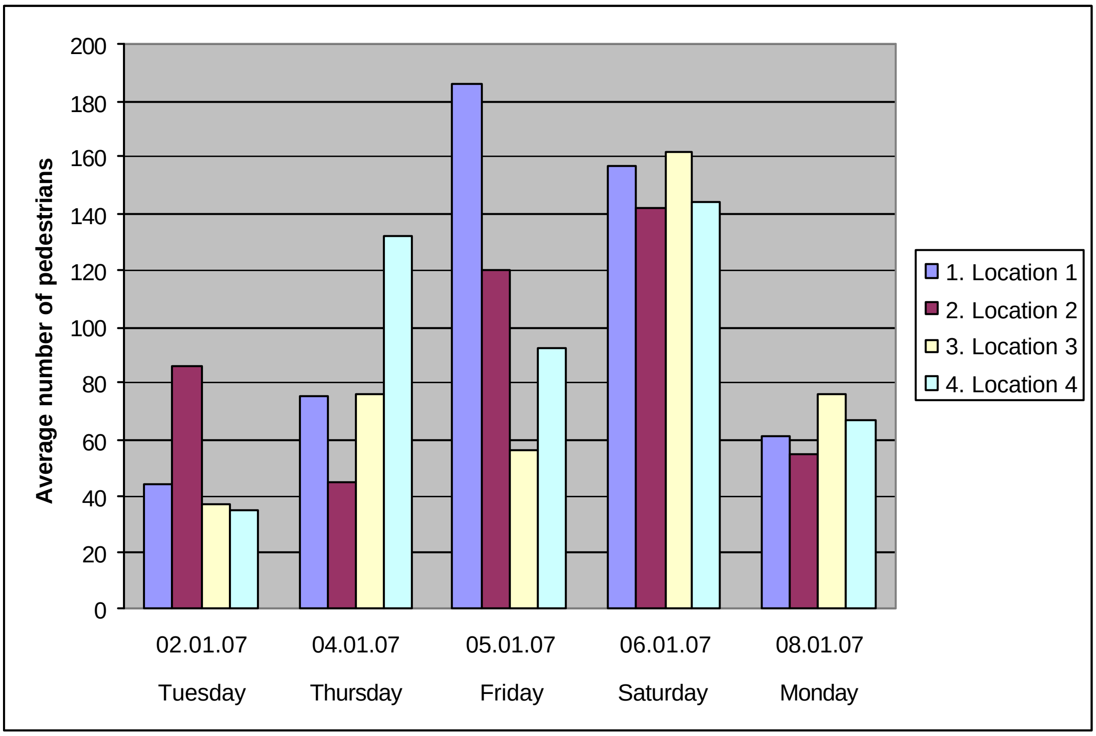
Figure LEI.8 Bradshawgate

Figure LEI.9 Leigh pedestrian count (average number of pedestrians recorded)

Location	Date of count					Total Count	Total Index
	Tuesday 02.01.07	Thursday 04.01.07	Friday 05.01.07	Saturday 06.01.07	Monday 08.01.07		
Location 1	44	75	186	157	61	523	100
Location 2	86	45	120	142	55	448	86
Location 3	37	76	56	162	76	406	78
Location 4	35	132	92	144	67	470	90
TOTAL	**202**	**328**	**454**	**605**	**259**	**1,847**	**-**

Source: NEMS Market Research, 2007

Figure LEI.10 Leigh pedestrian count



LEI.33 The pedestrian count data indicates that Saturday was the busiest of the five days in terms of footfall, with 605 pedestrians recorded in total, compared with 454 pedestrians on Friday and 328 pedestrians on Thursday. Location 1 recorded the greatest number of pedestrians overall with a total count for the five survey days of 523 persons, compared to 470 persons at Location 4, 448 persons at Location 2 and 406 persons at Location 3.

LEI.34 In respect of accessibility, the on-street survey undertaken by NEMS identified the following:

- 53% of visitors to Leigh had regular access to a car for personal use during the day and during the evening/night-time;
- The most common method of arriving in the centre was by a car or van (34%). This was followed by on foot (29%) and by bus, minibus or coach (29%);
- Of those that drove the most popular place to park was seen to be on-street, with 33.3% of drivers leaving their vehicle here. The

most frequently used car parks were: Spinningate Shopping Centre (24%) and the Library/Town Hall (7%);

- The majority of drivers (85%) had no difficulty in obtaining a car parking space on the day of the interview;
- 44% of people travelled for between six and ten minutes to reach Leigh, 19% travelled for less than five minutes and 16% for between eleven and fifteen minutes;
- Car parking provision was deemed to be ‘about the same’ in Leigh compared to other centres by 29% of visitors, although 26% considered it to be ‘worse’ than in other centres and 13% that it was ‘better’; and
- Accessibility by public transport was considered by 40% of visitors to Leigh to be ‘about the same’ as other centres, with 29% indicating that it was ‘better’ in Leigh than in other centres which they visited, and 7% that it was ‘worse’.

Perception of Safety and Occurrence of Crime

LEI.35 In terms of shopper safety during the day-time, the majority of visitors interviewed through the in-street survey (66%) deemed this to be ‘about the same’ as in other centres which they visited. However a significant 26% considered day-time safety in Leigh to be ‘better’ than in other centres. With respect to safety during the evening/night-time 37% indicated that this was ‘about the same’ as in other centres, with 19% stating that evening/night-time safety in Leigh was ‘worse’ than in other centres. 27% of respondents did not know either way.

Customer Views and Behaviour

LEI.36 The in-street survey undertaken by NEMS Market Research indicated the following in respect of visitors to Leigh:

- The vast majority of visitors to Leigh (94%) had travelled to the centre directly from home;

- Most of those interviewed (71%) indicated that they were not a visitor to the local area;
- The most popular responses recorded when visitors were asked why they were in Leigh were: to undertake food and grocery shopping (36%), to visit the bank/building society/Post Office (11%) and due to work/school/college (10%);
- Half of visitors (51%) planned to stay in the centre for up to two hours, with a further 31% planning to stay for up to half an hour;
- 46% of visitors indicated that they planned to undertake their main food shop on the day of the survey. Of these, 71% stated that they visited Leigh at least once a week for such purposes;
- 77% of visitors did not plan to purchase clothing and footwear goods on the day of the survey, with the majority of these people (40%) last visiting Leigh for such purposes;
- When visitors were asked how often they visited the centre today compared to five years ago, 38% stated that they visited Leigh 'about as frequently'. However, a significant 33% visited 'more frequently than before', whilst 9% visited 'less frequently than before'.

LEI.37 Visitors to Leigh were asked to rate the centre on a number of aspects, compared to other shopping centres which they visited. Most aspects were deemed to be 'about the same' in Leigh as in other centres which visitors frequented. The aspects identified by the largest proportion of respondents as being 'about the same' of other centres included the quality of shops, range of services such as banks and other financial services, shopping environment, cleanliness, and public information/ signposts/ public facilities.

Environmental Quality

LEI.38 Leigh is predominantly a linear centre, extending from Bold Street to Bradshawgate. Most of Bradshawgate is pedestrianised from Vernon Street to Back Market Street and this provides a safe environment for shoppers. At the time of the survey, there was a high level of footfall on Bradshawgate. Pavements in this area are wide, and pedestrian crossings aid movement by foot. The streets are clean with no evidence of litter, whilst shop units themselves are maintained to good standards creating an attractive shopping environment. Street furniture present in this area includes lighting, benches and bins, whilst CCTV is in operation.

LEI.39 Along the Eastern end of Bradshawgate, vehicular traffic is permitted although vehicular traffic is relatively low. There are some vacancies in this area of mixed quality. Footfall in this area is relatively low, and it does feel detached from the rest of the town centre. Perpendicular to the west of Bradshawgate is King Street which leads to Market Street (Figure LE1.11). This area contains high levels of fast moving vehicular traffic, although, pedestrian crossings are provided to reduce vehicular/ pedestrian conflict.

Figure LEI.11 King Street leading to Market

Business Survey

LEI.40 A business survey was delivered to 328 businesses within Leigh Town Centre. A total of 81 responses were received providing a response rate of 25%. A full schedule of results is contained as **Appendix 6**, however the main findings of the survey were:

- Of the businesses who responded to the survey, 42% had been trading in the centre for over twenty years, whilst 27% had been trading for ten to twenty years. Notably, only two traders has been operating for one year or less;

- Respondents to the survey comprised: 42% comparison retailers, 17% professional services, 14% leisure services, 13% retail services, 12% convenience retailers and 3% ‘other’ uses;
- 50% of respondents deemed business to have either grown significantly or grown moderately since they began trading in Leigh;
- 41% of respondents believed their business to be trading either well or very well, with 46% stating their business to be trading moderately;
- The majority of respondents (64%) leased their premises;
- Respondents relied on local residents for 57% of their trade;
- 44% of respondents deemed there to be too many non-retail uses in the town centre;
- Inadequate customer car parking was considered by the highest proportion of respondents (18%) to be the main constraint on current business performance. This was followed by the poor quality of the town centre shopping environment (14%) and lack of day visitors/tourists to the town (13%);
- 40% of respondents planned to reduce the floorspace of their business over the next five years; and
- The biggest competitor to business in Leigh was seen to be Bolton.

LEI.41 When asked to rate a number of different aspects of the town centre, access by public transport was seen to be good by 30% of respondents, whilst 81% considered the public toilets present in Leigh to be poor and 72% considered the quantity of parking spaces to be poor. In terms of improving the town centre, 83% of respondents considered that increasing the quantity of parking spaces in the centre would have a positive impact. In addition, 82% of respondents indicated that cheaper town centre parking would improve Leigh, and 80% believed that more public toilets would improve the centre.

Conclusions on Vitality and Viability

LEI.42 This study has shown Leigh to be a vital and viable town centre. In the past few years, commercial yields have decreased, indicating a strengthening retail sector. A fairly strong demand was shown by retailers seeking to locate to the town, accessibility was seen to be generally good, and the town centre shopping environment was attractive. Additionally the comparison and leisure retail sectors were shown to be strong when compared to the national average.

LEI.43 Notwithstanding these positive attributes, the retail service and financial and business services sectors in the town centre are below the UK national average. In addition, the convenience sector was seen to have declined since 2002 in terms of both the proportion of units and the proportion of floorspace that it occupies. However, vacancy rates have decreased over the past few years, highlighting a strength in Leigh's retail sector.