Ribble Valley Borough Council

Ribble Valley
Borough Council
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Retail Study Update 2013

June 2013

Part of the Local Development Framework Evidence Base

RibbleValley
Local Development Framework

Nathaniel Lichfield & Partners
Planning. Design. Economics.

Retail Study Update 2013

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1.0 Planning for Ribble Valley Town Centres

1.1 Ribble Valley Borough Council commissioned Nathaniel Lichfield & Partners (NLP) to prepare an update to its 2008 Retail Study. The Retail Study Update is written to inform policy development across the Borough but focuses specifically upon the three main settlements of Clitheroe, Longridge and Whalley.

1.2 The key objective of the Study is to provide a robust and credible evidence base to support the Public Examination of the Council's Core Strategy.

1.3 The Study:

1. assesses retail patterns and expenditure 'leakage' and quantifies the performance of centres/destinations;
2. assesses the future need and capacity for retail floorspace in the Borough over the period to 2028;
3. considers whether current retail provision is meeting the demands of Borough residents and whether there is a need to increase competition and/or influence the retail mix;
4. advises on how to meet any identified quantitative and qualitative need for new convenience and comparison retail floorspace up to 2028; and
5. advises on potential threats to the future retail health of the Borough town centres.

2.0 Retail and Commercial Leisure Trends

Retail Trends

2.1 The economic downturn has had, and is likely to continue to have, an impact on the retail sector and it is therefore important to consider national changes and the implications for Ribble Valley Borough. A number of national operators have failed (e.g. HMV, JJB Sports, Republic, Blockbuster, Clinton Cards, Woolworths, MFI, Borders, Game, Peacocks, TJ Hughes, Barratts and Habitat), leaving major voids within centres and retail parks. Many town centre development schemes have been delayed and the demand from traditional retail warehouse operators is also diminished. Even some of the main foodstore operators have seen a reduction in growth.

Expenditure Growth

2.2 Historic retail trends indicate that expenditure has consistently grown in real terms, generally following a cyclical growth trend. The underlying trend shows consistent growth and is expected to continue in the future. However, the current economic downturn is expected to lead to limited growth in the short term.

2.3 In the past, expenditure growth has fuelled the growth in retail floorspace, including major out-of-centre development in the 1980s and 1990s. The economic downturn suggests that growth during the past few years has slowed and a return to previous levels of growth is unlikely to be achieved in the short term. However, the underlying trend over the medium and long term is expected to lead to a need for further retail floorspace. NLP anticipates these national trends will be mirrored in Ribble Valley Borough.

2.4 New Forms of Retailing

2.5 New forms of retailing have emerged in recent years as an alternative to more traditional high-street shopping. Home/electronic shopping has expanded considerably with increasing growth in the use of personal computers and the internet. Smart phone technology, Apps and QR (Quick Response) codes are set to increase the proportion of shopping transactions undertaken remotely. Trends within this sector will have implications for retailing within Ribble Valley Borough. The growth in home computing, smart phone usage and interactive TV is likely to lead to a growth in remote shopping and will have further effects on retailing in the high street.

2.6 Online shopping has experienced rapid growth since the late 1990s but the latest available data suggests it remains a limited proportion of total retail expenditure. Recent trends suggest continued strong growth in this sector, albeit there is still uncertainty about its longer-term prospects and the potential effects on the high street. Experian (September 2011) projections suggest this growth will level off by 2016/17 and that growth in e-tailing has to a certain extent been at the expense of other forms of home shopping such as catalogue and mail order.

2.7 The implications on the demand for retail space are unclear. For example, some retailers operate online sales from their traditional retail premises. Therefore, growth in online sales may not always mean there is a reduction in the need for retail floorspace.

Retail Operators

2.8 In addition to new forms of retailing, operators have also responded to changing customer requirements e.g. extended opening hours and Sunday trading increasing significantly in the 1990s. Retailers have also responded to stricter planning controls by changing their trading formats. Some major food operators introduced smaller store formats capable of being accommodated within town centres, such as the Morrison's 'M Local', Tesco 'Express' and 'Metro', Sainsbury 'Local' and M&S 'Simply Food' formats. Asda has moved into the smaller store market through the acquisition of Netto. Food operators have also entered the local convenience store market, including Tesco 'Express' and M&S 'Simply Food' convenience stores linked to petrol filling stations. The entrance of European discount food operators such as Aldi and Lidl was rapid in the 1990s and 2000s, and this trend is evident within Ribble Valley Borough (i.e. Lidl in Clitheroe).

2.9 Foodstore operators also have a rolling programme of store extensions and reinvigoration, particularly Tesco, Sainsbury and Asda. Since 2012, Tesco in particular has concentrated on refreshing its existing stores, rather then new build. The main foodstore operators, faced with limited growth in food expenditure, attempted to increase the sale of non-food products within their foodstores, including clothing and electrical goods. The recent recession has halted this trend, and is now reversing it.

2.10 Comparison retailers have also responded to recent market conditions. The bulky goods retail warehouse sector has rationalised, including a number of mergers and failures, and scaled down store sizes. The demand for premises within the bulky goods sector, (i.e. furniture, carpets, electrical and DIY goods), is particularly weak in 2013. Existing bulky goods provision is already relatively limited in Ribble Valley due to the rural nature of the Borough.

2.11 Other traditional high street retailers, including Boots, TK Maxx and Poundstretcher, have sought large out-of-centre stores. Matalan opened numerous discount clothing stores across Great Britain in the 1990s. Sports clothing retail warehouses including Decathlon and JD Sports have expanded in out-of-centre locations.The charity shop sector has grown steadily over the past 20 years and there is no sign this trend will halt. The discount comparison sector has also grown significantly in recent years e.g. pound shops.

2.12 Within town centres, many high street multiple comparison retailers have changed their format. High street national multiples have increasingly sought larger modern shop units (over 200 sq. m) with an increasing polarisation of activity into the larger regional and sub-regional centres i.e. Preston and Blackburn.

2.13 The majority of vacant shop units in Ribble Valley Borough have a floorspace of less than 150 sq. m gross, and there are a limited number of medium to large units over 200 sq. m gross. Existing small shop premises are therefore unlikely to be attractive to most comparison multiple retailers in the future, and town centres are likely to be increasingly dominated by the independent, charity and discount sectors.

2.14 The continuation of these trends will influence future operator requirements in Ribble Valley Borough with smaller vacant units becoming less attractive for new multiple occupiers, with retailers increasingly looking to relocate into larger units in higher order centres.

3.0 New Research: 2013 Surveys

Telephone Household Survey

3.1 NEMS market research carried out a telephone survey of 500 households in May 2013 across a Study Area encompassing Ribble Valley Borough and extending west and south into the densely populated areas of north Preston and Hyndburn Borough. The Study Area is divided into five sub-zones.

3.2 The plan at **Appendix 1** illustrates the extent of the Study Area and its division by postcode sector. Table 3.1 below sets out the post-code sectors in each survey zone.

Table 3.1 Study Area Survey Zones

Survey Zone	Post Code Sector(s)
1. Forest of Bowland Rural Area	BB7 3, BB7 4
2. Clitheroe Area	BB71, BB7 2
3. Whalley Area	BB7 9, BB12 7, BB6 7
4. A59 Corridor	BB6 8, BB1 9, BB2 7
5. Longridge Area	PR3 2, PR3 3, PR2 5, PR3 5

3.3 The Study Area and survey zones used in the 2013 Retail Study Update are similar to those adopted in the 2008 Study. However, in order to create a larger Clitheroe sub-zone, postcode sector BB7 1 is incorporated into Zone 2 rather than forming part of Zone 3.

3.4 The 2013 household survey questionnaire is similar to that undertaken in relation to the 2008 Study to allow for comparison of change over time. **Appendix 2** includes the questionnaire and raw results of the household survey. Commentary on shopping patterns is provided in Section 4.0 and the results inform the capacity assessments at Section 5.0.

Business Occupier Survey

3.1 A business occupier survey (**Appendix 3**) was distributed to commercial businesses in Clitheroe (199 no.), Longridge (96 no.) and Whalley (42 no.). The business occupier survey analyses:

- type, origin and nature of trade;
- future plans (additional premises, relocation or extension of existing premises); and
- the availability and need for premises and sites.

4.0 The Shopping Hierarchy and Retail Performance

Centres in Ribble Valley and the Surrounding Area

4.1 The Borough of Ribble Valley is located within the Central Lancashire City-Region and is bounded by the administrative areas of Lancaster, Craven, Pendle, Burnley, Hyndburn, Blackburn with Darwen, Preston and Wyre.

4.2 Clitheroe is the largest town in Ribble Valley Borough and provides a range of shopping, service, leisure, business and public administration facilities that meet the day-to-day needs of residents. The town is well provided for in terms of convenience goods floorspace, but its comparison goods offer is limited by the proximity of the higher order centres of Preston and Blackburn.

4.3 Longridge is the second largest settlement in the Borough and plays a supporting role to Clitheroe in the local retail hierarchy. The centre comprises a number of smaller scale foodstores, independent shops and service uses that serve residents of the town and surrounding rural hinterland, including those areas to the north of Preston and south of Wyre Borough.

4.4 Whalley is the smallest centre in the Borough. Although it does not offer the range of goods, services and civic functions that are present in Clitheroe and Longridge, it provides a reasonable range of essential everyday goods and services that meet the basic shopping needs of local residents.

4.5 Management Horizon Europe's (MHE) UK Shopping Index 2008 ranks retail centres across the country. The MHE index rank for town centres in Ribble Valley Borough and competing centres in other administrative areas is shown in Table 4.1 below.

Table 4.1 MHE Retail Ranking

Centre	Rank ('08)	Rank ('03-'04)	Change	Classification
Preston	42	34	-8	Major Regional
Blackburn	141	135	-6	Sub-Regional
Burnley	145	143	-2	Sub-Regional
Accrington	282	251	-31	Major District
Clitheroe	**858**	**716**	**-142**	**Minor District**
Nelson	858	538	-320	Minor District
Colne	1,325	1,194	-131	Local
Longridge	**1,866**	**1,545**	**-321**	**Local**
Garstang	1,950	1,449	-501	Local
Padiham	2,247	-	-	Minor Local
Barnoldswick	3,120	-	-	Minor Local
Whalley	**4,226**	**-**	**-**	**Minor Local**

Source: Management Horizons Europe Shopping Index (2008)

4.6 The MHE score does not necessarily reflect the overall size of the town centre or the number of shops, but the presence of national multiples and the relative draw and importance that stores have. Each centre is given a weighted score which takes account of its provision of multiple retailers and anchor store strengths. For example, anchor department stores such as John Lewis or Debenhams receive a higher score (10) than other multiple operators such as H&M (3) in order to reflect their major influence on non-food shopping patterns.

4.7 Therefore, a location which has stronger retailers who attract more visitors to the centre and have a greater influence on shopping patterns will receive a higher score than those that do not. Towns with a greater number of independent shops may have a low MHE score in relation to their overall size because of the weight that is given to national multiple retailers and their influence on shopping patterns.

4.8 MHE ranks Clitheroe as the main centre in the Ribble Valley Borough and 858th of all centres in the UK. Clitheroe is below Blackburn, Preston, Burnley and Accrington within the Central Lancashire City-Region, and has suffered from a more significant fall in the rankings over the period from 2003/04 when compared with these centres. Longridge and Whalley are much lower in the index at 1,866th and 4,226th respectively, reflecting the local role and function played by these centres.

Household Shopping Patterns

4.9 The plan at Appendix 1 illustrates the Study Area adopted, which is postcode sector based and as such does not follow administrative boundaries precisely. The five zones approximate well to the boundary of Ribble Valley Borough, albeit Zone 3 and Zone 5 are part within and part outside the Borough (covering areas of Hyndburn and Preston respectively).

4.10 Typical convenience shopping habits result in the utilisation of a number of destinations for such purchases. The household survey reflects this by querying primary main food destination, secondary main food destination and top-up shopping destination. The analysis of the household survey assumes that 50% of available expenditure is directed to primary main food destinations, 20% is directed to secondary main food destinations and 30% is directed to top-up shopping destinations. The split between main food and top-up shopping is informed by Experian demographic information and local retail characteristics.

4.11 There is not a set formula for splitting expenditure by primary, secondary and top-up destinations but the NLP approach is robust and reflective of standard practice in the completion of retail and town centre studies. The analysis of the household telephone survey excludes ‘internet’/’mail-order’ responses and ‘don’t know/’don’t buy’ answers except where, in the primary main-food sector, internet spending on food goods is apportioned to stores based upon proximity to home address and the fascia identified by those interviewed.

4.12 The comparison retail spending power of the Study Area is split amongst categories of goods. The division of comparison goods spending power is:

- Clothing and Footwear – 25%;
- Domestic Electrical Appliances ('White Goods') – 4%;
- Other Electrical Goods including TVs/Music Systems/Computers – 12%;
- Furniture and Floor Coverings – 12%;
- DIY – 11%;
- Health and Beauty – 11%; and
- Books, CDs and Toys – 25%.

4.13 In common with the convenience goods assessment, there is not a set formula for splitting expenditure amongst different categories of comparison goods. The proportion of expenditure directed to different categories of goods is therefore informed by Experian demographic information.

4.14 The analysis below is based upon interviewees' responses to detailed questioning about: main food (primary and secondary destinations) and top up food shopping; and comparison shopping across the seven categories of goods. The analysis provides commentary on overall food and non-food shopping patterns.

4.15 The household survey results at Appendix 2 provide details of responses to questions querying primary main-food, secondary main-food and top-up shopping patterns and shopping patterns across the seven categories of comparison goods.

4.16 The statistical tables at **Appendix 4** combine the main-food and top-up shopping patterns, to arrive at overall convenience shopping patterns in the Study Area. The same approach is adopted for the comparison retail sector, where shopping patterns across goods categories are combined to provide an overall picture of comparison shopping patterns.

Borough Shopping Patterns

4.17 As set out at paragraph 4.9, Zone 3 and Zone 5 are part within and part outside the Ribble Valley Borough administrative area. The retail shopping patterns below therefore relate to the Study Area as a whole. However, given the proximity of these areas to the centres of Preston and Great Harwood, they are unlikely to have a significant influence on Borough shopping patterns.

Convenience Retail Shopping Patterns

4.18 Table 4.2 overleaf sets out market shares in the retail convenience sector.

Table 4.2 Convenience Retail Market Share in Ribble Valley Borough

Centre	Market Share (%)
Clitheroe Main Shopping Centre	25.6
Outside Clitheroe Main Shopping Centre	19.1
Longridge Town Centre	13.7
Whalley Town Centre	1.8
Other Destinations in Ribble Valley Borough	2.5
Ribble Valley Borough Total	**62.7**
Leakage	**37.3**

Source: NEMS Household Survey May 2013

4.19 The proportion of convenience retail expenditure retained in Ribble Valley Borough is relatively healthy at 62.7%. Destinations in and around Clitheroe town centre are the most popular for convenience goods shopping (44.7%). The market share of Longridge and Whalley is lower at 13.7% and 1.8% respectively, reflecting the more limited convenience offer of these towns.

4.20 Convenience retail expenditure retention in Ribble Valley Borough (main food and top-up) is highest in Zone 1 (86.3%) and Zone 2 (91.3%), with the majority of this being directed to the larger format foodstores situated in and around Clitheroe town centre.

4.21 The level of convenience retail expenditure retained in Zone 3 and Zone 4 is much lower. This indicates that a significant proportion of expenditure is directed to centres in Blackburn & Darwen and Hyndburn and is retained in these administrative areas, rather than lost from Ribble Valley Borough, and is a reflection of the limited convenience goods offer in these sub-zones. The most visited destinations for residents of Zone 3 and Zone 4 are Tesco stores in Great Harwood and Blackburn.

Comparison Retail Shopping Patterns

4.22 Market shares in the comparison sector are:

Table 4.3 Comparison Market Share in Ribble Valley Borough

Centre	Market Share (%)
Clitheroe Town Centre	29.4
Longridge Town Centre	3.5
Whalley Town Centre	1.3
Other destinations in Ribble Valley Borough	0.5
Ribble Valley Borough Total	**34.7**
Leakage	**65.3**

Source: NEMS Household Survey May 2013

4.23 Just over a third (34.7%) of the comparison retail expenditure generated in the Study Area is directed to destinations within Ribble Valley Borough. Clitheroe is the most popular destination in the Borough (29.4%), with Longridge (3.5%) and Whalley (1.3%) having an extremely limited share of the expenditure generated in the Study Area. Blackburn (22.2%) and Preston (17.2%) are the main destinations to which comparison retail expenditure from the Study Area is attracted, which is expected, given the proximity and higher order nature of these centres.

4.24 In common with the convenience goods sector, the comparison goods market share of the Study Area varies across the six zones. In Zone 1 and Zone 2 the retention of comparison goods expenditure is above 50%. Conversely, the lowest proportion of comparison retail expenditure (less than 20%) in Ribble Valley Borough is Zone 4 and Zone 5. This is due to the limited comparison floorspace offer in these zones, and also reflects travel to work patterns and the strong transport connections to Blackburn, Preston and Burnley.

5.0 Assessment of Retail Needs

Methodology

Population and Expenditure Data

5.1 The market shares recorded by the NEMS household survey are applied to the most up-to-date population and expenditure data to assess current trading patterns and project forward capacity for additional retail floorspace at 2013 and to 2018, 2023 and 2028.

5.2 The 2011 Census has been used as the base population data in order to be consistent with other NLP work undertaken for Ribble Valley Borough. The population for 2011-2021 is constrained to the 2011-based Sub-National Population projections [SNPP] for the area, by age and sex. Post 2021, the population growth is influenced by the interaction of trend-based assumptions regarding migration and natural change (i.e. births vs. deaths, generated by changes to the Total Fertility Rate [TFR]/Standardised Mortality Rates derived from the ONS 2010-based Interim SNPP).

Commitments

5.3 The figures shown in Tables 5.1, 5.2 and 5.3 below and at Appendix 4 do not take into account existing commitments. Commitments that come forward will reduce the overall capacity for new floorspace.

Constant Market Share Approach

5.4 The figures at Tables 5.1, 5.2 and 5.3 assume a constant market share approach.

Expenditure Leakage

5.5 Leakage of expenditure from a locality, and the potential for new floorspace to enact a claw-back of this, can be indicative of additional capacity. This is of particular relevance to Ribble Valley Borough in the comparison goods sector. However, it is not for a Borough-wide Retail Study to give consideration to claw-back and the implications of this on capacity. The retail assessment submitted with any planning application should justify how new floorspace would pass the ‘impact’ test through increasing the retention of expenditure within a locality and clawing back trade leaked to more distant destinations, rather than impacting upon existing floorspace with central area of the subject town.

Floorspace Efficiencies

5.6 An allowance is made for the turnover of existing comparison retail floorspace increasing by 1.7% per annum, as a result of the more efficient use of floorspace. This is a more modest rate of floorspace efficiency that was adopted commonly prior to the beginning of the economic downturn in 2008 and the reserved approach is a reflection if the continued economic uncertainty. The continued economic uncertainty is also the reasoning behind the adoption in the convenience retail assessment of 0% floorspace efficiency over the period covered by the Study.

Inflow of Expenditure

5.7 The extent of the Study Area adopted affects the degree to which the total turnover of a destination is captured. In order to understand whether the results of the NEMS household survey achieves a realistic recording of the retail turnover of convenience and comparison goods destinations (including that deriving from outside of the Study Area adopted in this assessment), NLP has reviewed the findings of retail studies undertaken in neighbouring authority areas (Pendle, Lancaster, Wyre, Hyndburn and Preston). The studies indicate that the inflow of convenience and comparison expenditure to Ribble Valley Borough from outside of the Study Area adopted in this assessment is limited, which is likely to be due to the strong convenience provision and the comparison offer of the higher order centres in surrounding Boroughs. For this reason, NLP has not made an allowance for inflow of expenditure to destinations within Ribble Valley Borough from outside of the Study Area.

Quantifying Capacity

5.8 The following section details the capacity for additional convenience and comparison retail floorspace in Clitheroe, Longridge and Whalley. For each centre, capacity is calculated by dividing the expenditure capacity generated by a typical sales density. The sales densities adopted for Clitheroe, Longridge and Whalley differ, to take into account the varying scales and format of retailing that is likely to be attracted to each centre. Capacity is presented as a net sales area, as it is this figure that is relevant to retail impact assessments required by the National Planning Policy Framework. The gross floorspace of retail developments will always be greater than the net trading area, but the ratio between net and gross floorspace varies greatly. The net sales area in a corner shop might be up to 90% of the gross, whereas the equivalent figure for a large format foodstore might be as little as 60%.

5.9 There are references in the following section to convenience retail floorspace trading at above or below expected levels. Table 5.2 and Table 5.4 compare the survey derived turnover of main foodstore destinations in Clitheroe and Longridge with expected (benchmark) turnover levels. The expected turnover of a convenience destination is the turnover that it would achieve were it to trade at either company average (for foodstores) or typical (for other floorspace) sales densities. Comparing survey derived turnover with benchmark turnover for convenience retail floorspace gives an indication as to whether destinations are trading above or below what might be expected. Floorspace data is derived from a number of sources including Goad and planning application data.

5.10 Comparison retail floorspace is assumed to be trading at survey derived turnover at 2013, which is adopted as the benchmark turnover. In the longer term, existing floorspace within the Borough is expected to increase its benchmark turnover in real terms and a growth rate of 1.7% per annum is adopted. Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of spending growing at faster rates than new floorspace provision and the ability of retailers to absorb real increases in their costs by increasing their turnover to floorspace ratio.

Borough Quantitative Capacity

Convenience Goods

5.11 Growth in the convenience goods spending power of the Study Area adopted is £6.6m to 2018, £17.6m to 2023 and £32.2m to 2028 (Table 3a at Appendix 4 provides full details).

5.12 The NLP capacity assessment follows an accepted methodology of applying available retail expenditure pro-rata to the market shares of destinations. It is also appropriate to take into account the performance of existing retail floorspace, compared with expected levels of performance. In circumstances where existing floorspace is assessed to be underperforming, it is appropriate for organic growth in spending to be first absorbed by this underperforming floorspace. Conversely, where existing floorspace is assessed to be performing above expected levels, this can add to the identified capacity for new retail floorspace.

Comparison Goods

5.13 Growth in comparison goods spending power of the Study Area adopted is £33.2m to 2018, £81.0m to 2023 and £147.1m to 2028.

5.14 Paragraph 5.12 applies to the approach adopted in the calculation of comparison capacity, with the exception that NLP assumes that comparison retail floorspace is trading at expected levels. It is notoriously difficult to 'benchmark' the expected turnover of comparison retail floorspace in a town and particularly when there is a high proportion of independent retailers.

Clitheroe

5.15 Table 5.1 overleaf sets out the current convenience and comparison retail capacity in Clitheroe and the capacity for additional floorspace over the periods to 2018, 2023 and 2028.

Table 5.1 Quantitative capacity for additional convenience and comparison retail floorspace - Clitheroe

Year	Convenience*		Comparison**	
	£(m)	sq. m (net)	£(m)^	sq. m (net)^
At 2013*	8.5	770	-	-
By 2018	10.8	983	2.4	443
By 2023	14.8	1,341	7.8	1,313
By 2028	19.9	1,812	16.9	2,626

**Convenience sales density of £11,000 sq. m Asda, Morrisons, Sainsbury's and Tesco foodstore average). No growth in floorspace efficiency over the period to 2028.*

***Comparison sales density of £5,000 per sq. m at 2013 increased by floorspace efficiencies to 2028 of 1.7% per annum.*

^2018, 2023 and 2028 comparison retail capacity assumes Ribble Valley Borough retains a constant market share.

Convenience Goods

5.16 Table 5.2 indicates that existing convenience retail floorspace within the Clitheroe area is trading at above expected levels.

Table 5.2 Survey derived turnover of main foodstores compared with expected trading levels – Clitheroe

Store	Benchmark Turnover (£m)	Survey Derived Turnover (£m)	Difference (£m)
Main Shopping Centre			
Booths, Station Road	12.8	16.7	+3.9
Tesco, Duck Street	13.9	18.4	+4.5
Outside Main Shopping Centre			
Lidl, Shawbridge	3.6	4.4	+0.8
Sainsbury's Moor Lane	17.3	20.1	+2.8

Source: NEMS Household Survey May 2013

5.17 The implication of the current strong performance across the convenience retail sector in Clitheroe is that there is immediate capacity for additional floorspace, which is set to increase over the period to 2028.

5.18 The immediate capacity identified (770 sq. m net) is sufficient to support a discount retailer or an extension to existing provision. In the longer term to 2028, the capacity identified (1,812 sq. m) is sufficient to support a medium-sized foodstore capable of performing a bulk food shopping role.

Comparison Goods

5.19 Table 14 at Appendix 4 summarises the current comparison retail performance of destinations in Ribble Valley Borough. It is assumed that destinations in Clitheroe are trading at expected levels at 2013 and it is therefore the year-on-year growth in comparison retail spending which accounts for the increase in capacity for additional comparison retail floorspace over the period to 2028.

5.20 Capacity for 443 sq. m net of additional comparison goods floorspace is identified by 2018, increasing to 1,313 sq. m net by 2023. The additional capacity identified in the long term to 2028 (2,626 sq. m) could deliver a meaningful extension to the comparison retail offer of the town centre.

5.21 Given the character and scale of Clitheroe town centre, it is suggested that the Council should seek to encourage development of floorspace in a number of smaller units which offer modern floorplates.

Longridge

5.22 Table 5.3 sets out the current convenience and comparison retail capacity in Longridge and the capacity for additional floorspace over the periods to 2018, 2023 and 2028.

Table 5.3 Quantitative capacity for additional convenience and comparison retail floorspace - Longridge

Year	Convenience*		Comparison**	
	£(m)	sq. m (net)	£(m)^	sq. m (net)^
At 2013	-	-	-	-
By 2018	-	-	0.4	108
By 2023	-	-	1.3	320
By 2028	1.1	136	2.9	640

**Convenience sales density of £8,000 adopted. No growth in floorspace efficiency over the period to 2028.*

***Comparison sales density of £3,500 per sq. m at 2013 increased by floorspace efficiencies to 2028 of 1.7% per annum.*

^2018, 2023 and 2028 comparison retail capacity assumes Ribble Valley Borough retains a constant market share.

Convenience Goods

5.23 Table 5.4 overleaf indicates that overall, existing convenience retail floorspace in Longridge is trading at below expected levels.

Table 5.4 Survey derived turnover of main foodstores compared with expected trading levels – Longridge

Store	Benchmark Turnover (£m)	Survey Derived Turnover (£m)	Difference (£m)
Booths, Berry Lane	10.7	9.6	-1.1
Sainsbury's Inglewhite	14.9	12.8	-2.1

Source: NEMS Household Survey May 2013

5.24 The effect is that existing convenience stores in the town have the capacity to absorb growth in convenience expenditure over the period 2013 to 2023 without generating a need for additional floorspace. The growth in convenience retail spending will assist in enhancing the performance of these stores, and the limited capacity identified at 2028 (136 sq. m) could be accommodated in a small extension to an existing foodstore.

Comparison Goods

5.25 Comparison retail floorspace is assumed to be trading at survey derived turnover at 2013 and capacity for additional comparison retail floorspace in Longridge is limited in the short term to 2018 (108 sq. m). Over the long term to 2028 there is capacity for 640 sq. m of additional comparison floorspace. This represents a moderate increase to the existing offer of Longridge town centre and the form of any development that comes forward should be carefully considered by the Council.

Whalley

5.26 Table 5.5 sets out the current convenience and comparison retail capacity in Whalley and the capacity for additional floorspace over the periods to 2018, 2023 and 2028.

Table 5.5 Quantitative capacity for additional convenience and comparison retail floorspace - Whalley

Year	Convenience*		Comparison**	
	£(m)	sq. m (net)	£(m)^	sq. m (net)^
At 2013	1.3	158	-	-
By 2018	1.4	177	0.0	12
By 2023	1.7	208	0.5	118
By 2028	2.0	249	1.1	236

**Convenience sales density of £8,000 adopted. No growth in floorspace efficiency over the period to 2028.*

***Comparison sales density of £3,500 per sq. m at 2013 increased by floorspace efficiencies to 2028 of 1.7% per annum.*

^2018, 2023 and 2028 comparison retail capacity assumes Ribble Valley Borough retains a constant market share.

Convenience Goods

5.27 Existing convenience retail floorspace in Whalley is limited to a Spar store and independent traders. However, the results of the household survey indicates that this floorspace is trading at above expected levels, generating immediate capacity for additional convenience retail floorspace. At 2013, there is capacity for up to 158 sq. m of additional convenience retail floorspace, increasing to 249 sq. m by 2028.

5.28 The capacity identified over the period to 2028 could support a small format foodstore (the Express format operated by Tesco, Local by Sainsbury's or similar). This would enhance Whalley's convenience provision, whilst remaining of a scale commensurate with existing units in the centre.

Comparison Goods

5.29 Comparison retail floorspace is assumed to be trading at survey derived turnover at 2013. There is limited quantitative capacity for additional comparison retail floorspace in Whalley town centre, with growth in spending creating capacity for 236 sq. m net of additional floorspace over the long term to 2028. This quantum of floorspace might be best accommodated by an extension to an existing unit, rather than the development of a standalone store.

Qualitative Capacity

5.30 Ribble Valley Borough Council has undertaken a health check of Clitheroe, Longridge and Whalley town centres in line with the requirements of the National Planning Policy Framework. This work indicates that the town centres function well within their respective roles and the existing provision and distribution of shopping and local services meets the day to day needs of residents. The NLP capacity assessment indicates that the main foodstores in Clitheroe are performing strongly and trade above expected levels. However, this is likely to be a result of their relatively limited scale, rather than an overiding need for new provision to generate choice and competition for local residents.

5.31 In terms of qualitative factors which may impact upon future viability, there is a perception that there is a lack of affordable parking in Longridge and Whalley. Environmental quality and the linear nature of Longridge town centre were also identified as issues which could affect retail trade.

5.32 The NLP qualitative capacity assessment is informed by a consideration of the potential for 'food deserts' and a business occupier survey, which seeks to gain an understanding of the needs of local businesses, as well as quantifying any requirements for additional floorspace in Ribble Valley Borough.

Food Deserts

5.33 The purpose of this assessment is to identify areas of the Borough which are underprovided for in terms of foodstore destinations, particularly those which meet 'bulk-food' needs. In order to identify whether any food deserts exist in Ribble Valley Borough, NLP has derived catchment areas for the different sized foodstores in the Borough. The catchment areas adopted are based upon guidelines of the distance considered both reasonable and sustainable to travel for main food and top-up shopping, but are adapted to take into account the rural character of Ribble Valley Borough, as it is considered that the distance that people can be expected to travel for convenience shopping is extended in less populated area.

5.34 The following catchment areas are adopted for foodstores of different sizes:

- Between 0 and 300 sq. m – 1.5km catchment area;
- Between 301 and 800 sq. m – 3km catchment area;
- Between 801 and 2,000 sq. m – 6km catchment area; and
- More than 2,001 sq. m – 9km catchment area.

5.35 The above catchment areas are applied to foodstores situated within Ribble Valley and those stores outside of the Borough where the household survey indicates that there is a proportion of overlap in terms of geography and patronage. The plan at **Appendix 5** illustrates concentrations of population within Ribble Valley Borough and the perceived catchment areas of foodstores.

5.36 The stores included within the assessment are main food shopping destinations and key top-up shopping destinations operated by multiple retailers. Independent retailers operating smaller foodstores are not identified on the plan, as their presence does not overcome the problem of food deserts.

Evaluation

5.37 The plan at Appendix 5 indicates that the settlements of Clitheroe and Longridge are well provided for in terms of main food and top-up shopping destinations. Although the main provision in Whalley (Spar) meets top-up shopping needs only, there is an overlap in the catchment areas of larger scale foodstores in Clitheroe and neighbouring authorities, particularly those situated in Hyndburn (Tesco, Aldi and Morrison's foodstores in Great Harwood).

5.38 The settlements of Slaidburn, Newton and Bolton-by-Bowland are outside the catchment areas for main and top-up shopping destinations within Ribble Valley Borough and neighbouring authorities. However, this is expected given that they lie within the Bowland Fells, where the population is less than 5 persons per hectare. It is a natural consequence of the rural nature of these areas that residents travel further for food shopping and the limited population restricts the number of unsustainable shopping trips made. It is also likely that shopping trips from such settlements are linked with other activities, as those living in the remotest parts of the Borough have to travel to centres for other services and employment opportunities.

5.39 Outside of the Bowland Fells, other small settlements such as Chatburn, Langho and Mellor are served by small-scale local retail destinations (i.e. post offices, butchers and independent newsagents) and also fall within the catchment area of foodstores situated within the neighbouring authorities of Blackburn and Hyndburn. Accordingly, it is not considered that there are any areas within Ribble Valley Borough that can be defined as 'food deserts'.

Local Business Needs

5.40 A business occupier survey was distributed to 337 commercial premises in the town centres of Clitheroe, Longridge and Whalley in May 2013. 115 businesses completed the survey, which is a response rate of 34%. A significant proportion of respondents (73%) to the survey are independent operators who rely, in the main, on custom from residents of local area and across Ribble Valley Borough as a whole.

5.41 Overall, 90% of respondents consider that their current accommodation meets business requirements. The highest satisfaction rate is in Longridge (97%), where only one business highlighted the inadequacy of its current accommodation. Of those businesses who responded to the survey in Clitheroe, 88% are satisfied with their existing premises. Of the 7 respondents who require additional space in Clitheroe, 4 have a preference for replacement premises, and 3 would like to extend their current accommodation. In Whalley, 3 respondents out of 17 (12%) consider that existing premises do not meet business requirements.

5.42 In total, only 15 out of a total 115 respondents from across Ribble Valley Borough have a requirement for additional floorspace. There is no requirement from any respondent for additional premises; 53% require replacement premises and 47% of respondents would like to extend their current premises.

5.43 The key reason for businesses not requiring additional floorspace is a lack of commercial justification. Informal comments from some respondents suggest that other factors such as a lack of car parking and high business rates limit the need for additional floorspace.

5.44 Overall, the survey results indicate that existing town centre occupiers consider that there is limited scope for business growth. This is highlighted by the fact that there is no requirement from any respondent for additional premises in Ribble Valley Borough, and only a limited number of businesses require replacement accommodation or an extension to existing premises. Of those respondents who indicated a specific spatial requirement for additional floorspace, this relates to only 10 sq. m net or less, which again demonstrates that business operators in Ribble Valley Borough are not considering significant expansion.

6.0 Threats to Future Retail Health

Growth of Higher Order Centres

6.1 In 2005 the economy was thriving and buoyant, and demand for retail floorspace peaked. Retailers were expanding rapidly, with many new shopping centres planning or in the process of construction. However, much of this development was focussed on major cities and larger town centres, resulting in smaller neighbouring towns lessening in importance. The impact of this trend is apparent in Ribble Valley Borough, with Clitheroe suffering from a more significant fall in the MHE retail rankings over the period from 2003/04 when compared with nearby Blackburn, Preston and Burnley.

6.2 However, the recession of 2008/2009 brought a halt to new development and many established retailers went into administration or receivership. Recent research[1] indicates that 2012 was the first year since 1983 that no significant new shopping centre opened. Many schemes that were in the development pipeline have now stalled. This is evident throughout the country and within the Central Lancashire Sub-Region; both Preston (Tithebarn, Lendlease) and Burnley (The Oval, Henry Boot Developments) have abandoned plans for major town centre development schemes. This trend is set to continue, with retailers reducing their requirement for additional floorspace and focussing on fewer shops.

6.3 The larger towns surrounding Ribble Valley Borough (Preston, Blackburn and, to a lesser extent, Burnley) are already major shopping centres and play an important role in the Central Lancashire Sub-Region. This is evident in the shopping patterns recorded by the 2013 NEMS household survey, which indicates that there is a leakage of expenditure from Ribble Valley Borough (particularly in the comparison goods sector) to these centres. However, given the current economic climate, it is unlikely that these principal centres will undergo significant expansion in the near future.

Changes to the Retail Sector

6.4 In May 2013 the Centre for Retail Research (CRR) published its “Retail in 2018” report, which predicts that nearly 62,000 high street stores across Great Britain (22% in total) will close between 2012 and 2018. The data quoted by CRR indicates that the number of shop units within town centres has declined consistently since the early 1960s, with 1978 to 1982 being the only period of growth in the last 50 years. The most recent figures show a decline from over 300,000 shop units in 2001 to 282,000 in 2012.

[1] BCSC/Lunson Mitchenall 2012 Shopping Centre Development Pipeline (April 2012)

6.5 Although this data suggests that town centres are in decline, it hides underlying structural changes in the retail sector. Food and drink, leisure and non-retail service sectors have been successful in occupying space no longer suitable for shopping and this is evident in Ribble Valley Borough; vacancy rates in Clitheroe, Longridge and Whalley are below the national average[2] and there is a healthy representation of restaurants, pubs and bars, all of which contribute to the vitality and viability of town centres.

6.6 Notwithstanding this, a proactive approach is required to continue to attract investment and promote diversification of Ribble Valley Borough's town centres. This could include the revamp of existing retail stock where appropriate and the redevelopment or conversion of obsolete accommodation to other uses.

Expansion of Retail Parks

6.7 There are a number of retail parks proximate to Ribble Valley Borough which provide units with large modern floorplates and dedicated car parking. Although many accommodate bulky goods retailers whose formats tend not to be suited to town centres locations, some have a stronger representation of retailers that sell goods traditionally associated with the high street.

6.8 Whitebirk Retail Park is the largest retail park in the area surrounding Ribble Valley Borough (circa 22,500 sq. m gross floorspace across 15 units). The range and class of goods that can be sold from the park is restricted to bulky goods and is controlled through the original Section 52 agreement and a later Section 106 agreement. In late 2012, the owner of the retail park, Peel Holdings, failed in its challenge to Hyndburn Borough Council's decision to refuse a series of Lawful Development Certificates confirming a change of use to open Class A1 retail use.

6.9 Although the High Court judgement dismissed Peel Holdings application for Judicial Review, permission to appeal to the Court of Appeal was granted because the case raises important issues of law. The appeal was held on 17 June 2013 and its outcome will be of importance in terms of the interpretation of planning permissions and the way in which developers may seek to relax bulky goods restrictions on retail parks.

Physical Constraints

6.10 Valuation Office data indicates that the amount of retail floorspace in England and Wales has grown by over 3% during the economic downturn (2008 to 2012), despite a period of poor expenditure growth and an increase in online shopping. This indicates an underlying trend towards fewer but larger retail stores, which presents a challenge for market towns such as Clitheroe, Longridge and Whalley, where development opportunities are limited. This

[2] Data sourced from Experian Goad summary reports for Clitheroe, Longridge and Whalley

highlights the importance of providing an effective choice and quality/range of retail opportunities. When planning for growth in their town centres, local planning authorities should allocate a range of suitable sites to meet the scale and type of retail development needed. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability.

7.0 Conclusions

7.1 Ribble Valley Borough Council commissioned NLP to prepare an update to its 2008 Retail Study. The Retail Study Update is written to inform policy development across the Borough but focuses specifically upon the three main settlements of Clitheroe, Longridge and Whalley.

7.2 The Study is informed by a telephone survey of 500 residents in a survey area covering Ribble Valley Borough and extending west and south into neighbouring Preston City and Hyndburn Borough, and a survey of commercial businesses in Clitheroe, Longridge and Whalley town centres.

7.3 A consideration of the qualitative need for additional floorspace is informed by an assessment of the potential for 'food deserts' and a business occupier survey, which seeks to gain an understanding of the needs of local businesses.

Shopping Patterns 2013

7.4 The retention of convenience shopping expenditure in the Borough is relatively healthy at 62.7%. Clitheroe is the most dominant destination (44.7%) and the majority of this expenditure is directed to larger format foodstores in and around the main shopping area. Longridge (13.7%) and Whalley (1.8%) provide a subordinate convenience retail role.

7.5 Ribble Valley Borough retains just over a third (34.7%) of the comparison retail spending power in the Study Area. Again, Clitheroe is the most popular destination in the Borough (29.4%), with Longridge (3.5%) and Whalley (1.3%) having an extremely limited share of the expenditure generated in the Study Area. Blackburn (22.2%) and Preston (17.2%) are the main destinations to which comparison retail expenditure from the Study Area is attracted, which is expected, given the proximity and higher order nature of these centres.

Retail Capacity Assessment

7.6 The retail capacity assessment assumes a constant market share, projecting forward shopping patterns recorded by the 2013 NEMS household survey. The quantitative assessment of the potential capacity for new retail floorspace suggests that there is scope for new retail development within Ribble Valley Borough.

7.7 Table 7.1 and Table 7.2 overleaf summarise the capacity for additional convenience and comparison retail floorspace for the three town centres in Ribble Valley Borough. Capacity beyond 2018 should be viewed with caution as there is little certainty over long term economic performance and prosperity.

Table 7.1 Convenience Capacity by Centre

Centre	Convenience Capacity (sq. m net)			
	At 2013	At 2018	At 2023	At 2028
Clitheroe	770	983	1,341	1,812
Longridge	-	-	-	136
Whalley	158	177	208	249

Table 7.2 Comparison Capacity by Centre

Centre	Comparison Capacity (sq. m net)			
	At 2013	At 2018	At 2023	At 2028
Clitheroe	-	443	1,313	2,626
Longridge	-	108	320	640
Whalley	-	12	118	236

Meeting Shopping Needs in Ribble Valley Borough

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

7.9 The Submission Core Strategy promotes retail development of a scale appropriate to centres and the catchment population intended to be served. The centre of Clitheroe is therefore the only part of the Borough considered suitable and capable of accommodating major retail development. This policy direction is consistent with the findings of the NLP capacity assessment.

7.10 As set out above, the retail capacity assessment assumes that the market share and role of Clitheroe, Longridge and Whalley will remain unchanged in the future. Whilst this study is primarily a quantitative capacity update and does not address in detail the vitality and viability of town centres, it is appropriate to make reference to the importance of qualitative improvements in provision. For example, if a proposal for retail development comes forward that exceeds the capacity projections set out in Table 7.1 and Table 7.2, this does not necessarily mean the proposal should be refused planning permission, subject to it being consistent with the role, character and catchment area of the town centre, as well as being justified in terms of the Framework sequential approach and impact tests. Additional retail floorspace in Ribble Valley's town centres could claw-back trade that is currently directed to locations outside of Borough.

7.11 The implications of major retail development in centres surrounding the Borough should also be monitored, with consideration given to the effect that such proposals may have on the demand for additional retail floorspace in Ribble Valley.

7.12 In relation to the rural economy, the National Planning Policy Framework states that local and neighbourhood plans should promote the retention and development of local services and community facilities in villages, such as local shops, meeting places, sports venues, cultural buildings, public houses and places of worship (para 28).

Clitheroe

7.13 Clitheroe is the largest settlement in Ribble Valley Borough and the principal retail destination. The town centre is well-provided for in terms of convenience floorspace, but the comparison goods offer, particular in the form of multiple retailers, is limited. The capacity for additional comparison floorspace identified in Section 5.0 could be provided in units with larger modern floorplates to meet the requirements of retail operators, whilst remaining appropriate to the scale of the town.

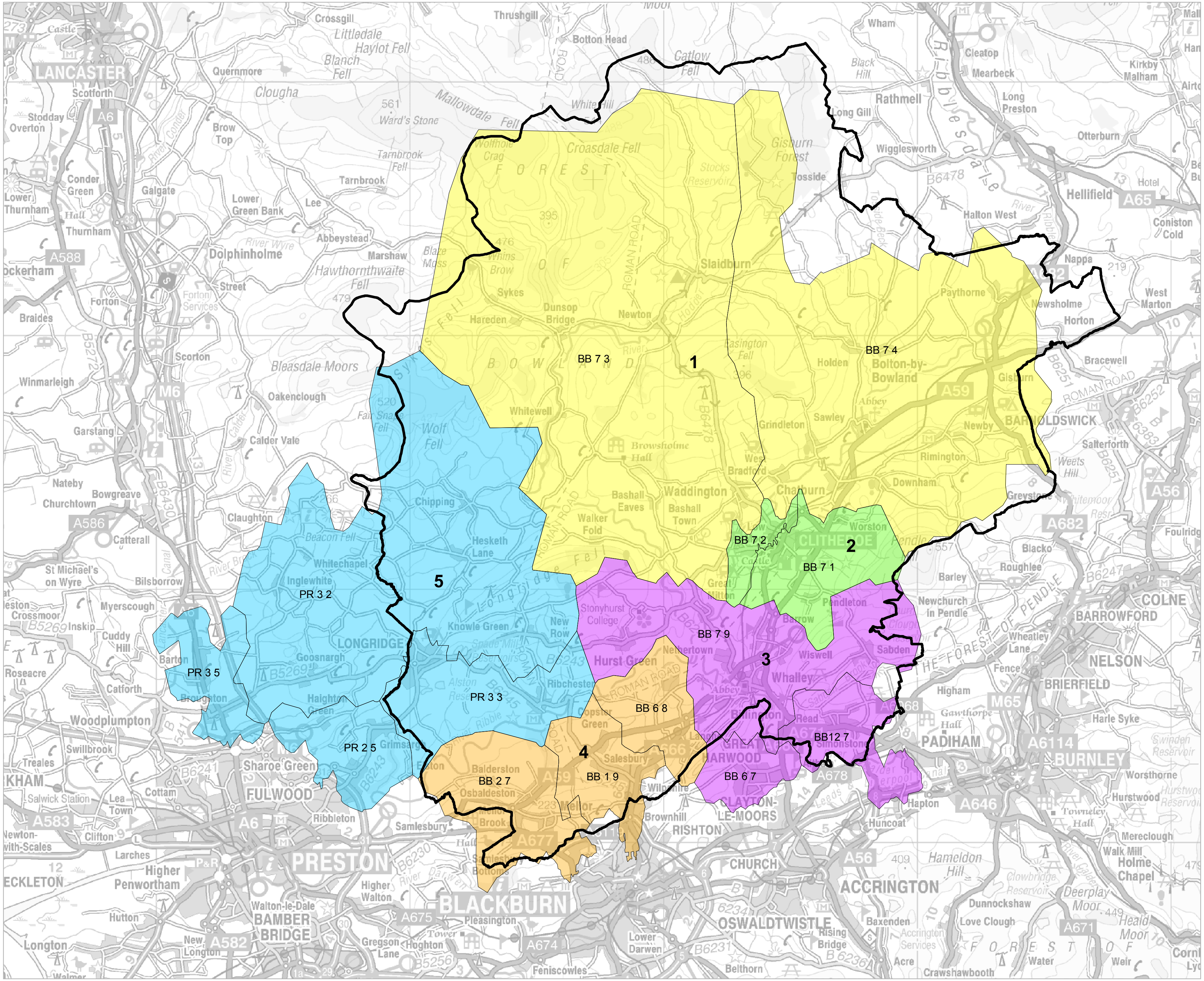
Longridge

7.14 Longridge performs as a key service centre, providing for the retail needs of residents of the town and surrounding rural hinterland, including those areas to the north of Preston and south of Wyre Borough. The capacity assessment identifies scope for a small amount of convenience and comparison floorspace, which could be accommodated in an extension to existing provision or a single-occupier unit.

Whalley

7.15 Whalley is a small centre which meets the basic needs of residents, but relies on Clitheroe and Longridge for main food shopping provision and high street comparison goods. Capacity is identified for a limited amount of additional convenience and comparison floorspace, which would enhance existing provision without resulting in any significant growth to the centre.

Appendix 1 Study Area



Key

- Ribble Valley Local Authority Boundary
- Zone 1 - Forest of Bowland Rural Area
- Zone 2 - Clitheroe Area
- Zone 3 - Whalley Area
- Zone 4 - A59 Corridor
- Zone 5 - Longridge Area
- Postal Sector

nlp Nathaniel Lichfield & Partners
Planning. Design. Economics.

Project	Ribble Valley Retail Study Update 2013
Title	Study Area: Ribble Valley Retail Study Update 2013
Client	Ribble Valley Borough Council
Date	June 2013
Scale	1 : 200,000 @ A4
Drawn by	MAR
Drg. No	GIS41239/01-01

GIS Reference: S:\MA41239 - Ribble Valley Retail Study Update 2013\MA41239 - Ribble Valley Retail Study Update 2013 - Study Area - 01.05.2013.mxd

Appendix 2 Household Survey Questionnaire & Raw Results

Q01 At which store or shop did you do your household's last main food and grocery shopping ?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Aldi, Argyle Street, Accrington	0.4%	2	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Aldi, Blackpool Road, Preston	0.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4
Aldi, Heys Lane, Great Harwood	2.4%	12	1.0%	1	1.0%	1	6.0%	6	4.0%	4	0.0%	0
Asda, Grimshaw Retail Park, Blackburn	3.0%	15	1.0%	1	1.0%	1	3.0%	3	10.0%	10	0.0%	0
Asda, Hyndburn Road, Accrington	2.8%	14	2.0%	2	2.0%	2	8.0%	8	2.0%	2	0.0%	0
Asda, Pittman Way, Fulwood, Preston	4.8%	24	1.0%	1	0.0%	0	0.0%	0	0.0%	0	23.0%	23
Asda, Princess Way, Burnley	0.4%	2	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Booths, Berry Lane, Longridge	4.4%	22	0.0%	0	0.0%	0	1.0%	1	0.0%	0	21.0%	21
Booths, Sharoe Green Lane, Fulwood	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Booths, Station Road, Clitheroe	13.6%	68	30.0%	30	22.0%	22	7.0%	7	9.0%	9	0.0%	0
Co-op, Inglewhite Road, Longridge	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Iceland, North Road, Preston	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Lidl, Shaw Bridge Street, Clitheroe	3.0%	15	7.0%	7	6.0%	6	1.0%	1	1.0%	1	0.0%	0
Morrisons, Ashton-on-Ribble, Preston	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Morrisons, Broughton Rd, Skipton	0.4%	2	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Pendle Street, Nelson	0.8%	4	2.0%	2	1.0%	1	1.0%	1	0.0%	0	0.0%	0
Morrisons, Queen Street, Great Harwood	2.0%	10	0.0%	0	0.0%	0	10.0%	10	0.0%	0	0.0%	0
Morrisons, Railway Road, Blackburn	3.2%	16	0.0%	0	0.0%	0	0.0%	0	16.0%	16	0.0%	0
Sainsbury's, Bamber Bridge, Preston	0.8%	4	0.0%	0	0.0%	0	0.0%	0	3.0%	3	1.0%	1
Sainsbury's, Flintoff Way, Preston	0.8%	4	0.0%	0	0.0%	0	0.0%	0	1.0%	1	3.0%	3
Sainsbury's, Inglewhite Road, Longridge	6.8%	34	0.0%	0	0.0%	0	1.0%	1	1.0%	1	32.0%	32
Sainsbury's, Moor Lane, Clitheroe	14.0%	70	14.0%	14	34.0%	34	18.0%	18	4.0%	4	0.0%	0
Tesco Express, Market Way, Blackburn	0.6%	3	0.0%	0	0.0%	0	1.0%	1	2.0%	2	0.0%	0
Tesco, Duck Street, Clitheroe	15.2%	76	32.0%	32	29.0%	29	10.0%	10	4.0%	4	1.0%	1
Tesco, Eagle Street, Accrington	0.4%	2	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0
Tesco, Finsley Gate, Burnley	0.6%	3	1.0%	1	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Tesco, Hill Street, Blackburn	3.8%	19	0.0%	0	0.0%	0	1.0%	1	18.0%	18	0.0%	0
Tesco, Queen Street, Great Harwood	5.8%	29	1.0%	1	1.0%	1	20.0%	20	7.0%	7	0.0%	0
Tesco, Wyre Street, Padiham	0.8%	4	0.0%	0	0.0%	0	4.0%	4	0.0%	0	0.0%	0
Local shops, Blackburn	0.6%	3	0.0%	0	0.0%	0	0.0%	0	2.0%	2	1.0%	1
Local shops, Clitheroe	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Longridge	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Local shops, Padiham	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Preston	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Internet	2.4%	12	2.0%	2	0.0%	0	3.0%	3	5.0%	5	2.0%	2
Aldi, Bolton Road, Blackpool	0.6%	3	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0
Booths, Park Hill Road, Garstang	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Lidl, Whalley Banks, Blackburn	0.4%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1
Marks & Spencer, King William Street, Blackburn	0.4%	2	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Morrisons, Poulton Street, Kirkham	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Morrisons, Squires Gate Lane, Blackpool	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Sainsbury's, Moor Lane,	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Clitheroe												
Tesco Express, Roe Lee Retail Centre, Whalley Lee Road, Blackburn	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Tesco, Craven Street, Skipton	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, Capitol Centre, Walton Le Dale	0.6%	3	0.0%	0	0.0%	0	0.0%	0	2.0%	2	1.0%	1
(Don’t know / can't remember)	0.4%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1
Base:		500		100		100		100		100		100

Q01A Which retailer do you shop online with?

Those who shop online at Q01

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Asda	33.3%	4	50.0%	1	0.0%	0	66.7%	2	0.0%	0	50.0%	1
Ocado	8.3%	1	0.0%	0	0.0%	0	0.0%	0	20.0%	1	0.0%	0
Sainsbury's	16.7%	2	0.0%	0	0.0%	0	0.0%	0	40.0%	2	0.0%	0
Tesco	41.7%	5	50.0%	1	0.0%	0	33.3%	1	40.0%	2	50.0%	1
Base:		12		2		0		3		5		2

Q02 While you were on your last main food shop at (LOCATION MENTIONED AT Q01) did you, (or anyone else with you) carry out any of the following activities? [MR/PR]

Not those who shop online at Q01

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Go to Bank, Post Office, Building society or Cash point	28.1%	137	31.6%	31	27.0%	27	33.0%	32	22.1%	21	26.5%	26
Get Petrol	18.6%	91	18.4%	18	8.0%	8	20.6%	20	18.9%	18	27.6%	27
Shopping for other food items	23.0%	112	17.3%	17	18.0%	18	24.7%	24	28.4%	27	26.5%	26
Shopping for non food items	19.5%	95	16.3%	16	20.0%	20	20.6%	20	22.1%	21	18.4%	18
Window shopping / browsing	10.9%	53	10.2%	10	12.0%	12	7.2%	7	10.5%	10	14.3%	14
Hairdressers, dry cleaners, or other service	3.9%	19	5.1%	5	3.0%	3	1.0%	1	6.3%	6	4.1%	4
Cinema	0.4%	2	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0
Pub / Bar / Restaurant	5.7%	28	6.1%	6	2.0%	2	3.1%	3	10.5%	10	7.1%	7
Nightclub / Live music	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Health & fitness club	0.8%	4	1.0%	1	0.0%	0	0.0%	0	1.1%	1	2.0%	2
Libraries	1.8%	9	3.1%	3	2.0%	2	2.1%	2	1.1%	1	1.0%	1
(Nothing else)	42.0%	205	46.9%	46	52.0%	52	38.1%	37	40.0%	38	32.7%	32
Base:		488		98		100		97		95		98

Q03 Is there any other store or shop at which you do your main food and grocery shopping ?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Aldi, Argyle Street, Accrington	0.4%	2	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Aldi, Blackpool Road, Preston	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Aldi, Heys Lane, Great Harwood	1.8%	9	1.0%	1	0.0%	0	6.0%	6	2.0%	2	0.0%	0
Asda, Grimshaw Retail Park, Blackburn	2.0%	10	0.0%	0	1.0%	1	1.0%	1	8.0%	8	0.0%	0
Asda, Hyndburn Road, Accrington	2.4%	12	1.0%	1	4.0%	4	7.0%	7	0.0%	0	0.0%	0
Asda, Pittman Way, Fulwood, Preston	2.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.0%	10
Asda, Princess Way, Burnley	0.8%	4	2.0%	2	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Booths, Berry Lane, Longridge	3.6%	18	1.0%	1	0.0%	0	0.0%	0	0.0%	0	17.0%	17
Booths, Station Road, Clitheroe	7.6%	38	17.0%	17	6.0%	6	6.0%	6	9.0%	9	0.0%	0
Clitheroe Market	0.6%	3	0.0%	0	2.0%	2	0.0%	0	1.0%	1	0.0%	0
Co-op, Inglewhite Road, Longridge	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3
Lidl, Shaw Bridge Street, Clitheroe	3.6%	18	5.0%	5	7.0%	7	5.0%	5	1.0%	1	0.0%	0
M&S Simply Food, Broadway, Accrington	0.4%	2	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
M&S Simply Food, St. James Street, Burnley	0.4%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1
Morrisons, Broughton Rd, Skipton	1.0%	5	2.0%	2	3.0%	3	0.0%	0	0.0%	0	0.0%	0
Morrisons, Pendle Street, Nelson	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Queen Street, Great Harwood	3.2%	16	0.0%	0	0.0%	0	13.0%	13	3.0%	3	0.0%	0
Morrisons, Railway Road, Blackburn	1.6%	8	1.0%	1	0.0%	0	1.0%	1	5.0%	5	1.0%	1
Sainsbury's, Active Way, Burnley	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Bamber Bridge, Preston	1.4%	7	1.0%	1	0.0%	0	0.0%	0	6.0%	6	0.0%	0
Sainsbury's, Flintoff Way, Preston	0.8%	4	0.0%	0	0.0%	0	0.0%	0	1.0%	1	3.0%	3
Sainsbury's, Inglewhite Road, Longridge	5.2%	26	1.0%	1	0.0%	0	0.0%	0	0.0%	0	25.0%	25
Sainsbury's, Moor Lane, Clitheroe	10.4%	52	13.0%	13	20.0%	20	8.0%	8	9.0%	9	2.0%	2
Spar, George Street, Whalley	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Tesco Express, Market Way, Blackburn	0.8%	4	0.0%	0	0.0%	0	2.0%	2	1.0%	1	1.0%	1
Tesco, Duck Street, Clitheroe	8.6%	43	13.0%	13	20.0%	20	7.0%	7	3.0%	3	0.0%	0
Tesco, Eagle Street, Accrington	0.4%	2	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Tesco, Finsley Gate, Burnley	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Tesco, Hill Street, Blackburn	1.4%	7	0.0%	0	1.0%	1	0.0%	0	6.0%	6	0.0%	0
Tesco, Queen Street, Great Harwood	3.8%	19	2.0%	2	3.0%	3	11.0%	11	3.0%	3	0.0%	0
Whiteheads, Park Street, Great Harwood	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Local shops, Blackburn	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Local shops, Clitheroe	1.6%	8	1.0%	1	4.0%	4	1.0%	1	0.0%	0	2.0%	2
Local shops, Great Harwood	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Local shops, Longridge	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3
Local shops, Padiham	0.4%	2	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Local shops, Preston	0.4%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1
Local shops, Whalley	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Internet	0.8%	4	0.0%	0	0.0%	0	1.0%	1	2.0%	2	1.0%	1
Aldi, Cuerden Way, Bamber Bridge	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Aldi, North Valley Retail Park, Colne	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Corporation Street, Colne	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Preston New Road,	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Blackburn												
Lidl, New Hall Lane, Preston	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Local shops, Bolton	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Local shops, Mellor	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Sainsbury's, Park Hill Road, Garstang	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Spar, Edisford Road, Clitheroe	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Clifton Retail Park, Clifton Road, Blackpool	0.6%	3	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.0%	2
Tesco, Highfield Road, Blackpool	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Waitrose, Capitol Centre, Walton Le Dale	0.4%	2	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0
(Don’t know / can't remember)	0.4%	2	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0
(No others)	26.2%	131	32.0%	32	28.0%	28	14.0%	14	33.0%	33	24.0%	24
Base:		500		100		100		100		100		100

Q04 How do you normally travel to do your main food shopping?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Car-driver	73.6%	368	75.0%	75	65.0%	65	78.0%	78	77.0%	77	73.0%	73
Car-passenger	13.8%	69	19.0%	19	12.0%	12	7.0%	7	15.0%	15	16.0%	16
Bus / coach	2.6%	13	3.0%	3	0.0%	0	6.0%	6	1.0%	1	3.0%	3
Taxi	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Walk	5.8%	29	0.0%	0	19.0%	19	4.0%	4	1.0%	1	5.0%	5
Use Internet / get it delivered	2.4%	12	2.0%	2	0.0%	0	3.0%	3	5.0%	5	2.0%	2
Mobility scooter	0.4%	2	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
(Don’t know / varies)	1.2%	6	1.0%	1	1.0%	1	2.0%	2	1.0%	1	1.0%	1
Base:		500		100		100		100		100		100

Q05 Where do you normally start your main food shopping trip from? [PR]
Those specifying a physical location at either Q01 or Q03 or both

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Home	92.9%	457	95.0%	95	93.0%	93	96.0%	95	87.4%	83	92.9%	91
Work	4.9%	24	4.0%	4	3.0%	3	3.0%	3	8.4%	8	6.1%	6
School	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Leisure destination / Leisure activity	0.6%	3	1.0%	1	0.0%	0	0.0%	0	2.1%	2	0.0%	0
(Don't know / Varies)	1.4%	7	0.0%	0	3.0%	3	1.0%	1	2.1%	2	1.0%	1
Base:		492		100		100		99		95		98

Q06 In addition to your main food shopping, which store or shop did you last visit for small scale / top-up shopping for things like bread, milk or newspapers?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Aldi, Argyle Street, Accrington	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Aldi, Blackpool Road, Preston	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Aldi, Heys Lane, Great Harwood	0.4%	2	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Asda, Grimshaw Retail Park, Blackburn	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Asda, Hyndburn Road, Accrington	0.6%	3	0.0%	0	0.0%	0	2.0%	2	1.0%	1	0.0%	0
Asda, Pittman Way, Fulwood, Preston	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Asda, Princess Way, Burnley	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Booths, Berry Lane, Longridge	4.0%	20	0.0%	0	0.0%	0	1.0%	1	0.0%	0	19.0%	19
Booths, Kirkgate, Settle	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Booths, Sharoe Green Lane, Fulwood	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Booths, Station Road, Clitheroe	7.0%	35	13.0%	13	16.0%	16	2.0%	2	4.0%	4	0.0%	0
Clitheroe Market	1.2%	6	5.0%	5	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Co-op, Burnley Road, Barrow	0.8%	4	0.0%	0	0.0%	0	3.0%	3	1.0%	1	0.0%	0
Co-op, Inglewhite Road, Longridge	1.8%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.0%	9
Lidl, Shaw Bridge Street, Clitheroe	1.6%	8	3.0%	3	3.0%	3	2.0%	2	0.0%	0	0.0%	0
M&S Simply Food, St. James Street, Burnley	0.4%	2	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Morrisons, Queen Street, Great Harwood	3.4%	17	0.0%	0	0.0%	0	16.0%	16	1.0%	1	0.0%	0
Morrisons, Railway Road, Blackburn	1.6%	8	0.0%	0	0.0%	0	0.0%	0	8.0%	8	0.0%	0
Sainsbury's, Active Way, Burnley	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Inglewhite Road, Longridge	3.8%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	19.0%	19
Sainsbury's, Moor Lane, Clitheroe	6.8%	34	6.0%	6	22.0%	22	3.0%	3	2.0%	2	1.0%	1
Spar, George Street, Whalley	3.6%	18	0.0%	0	0.0%	0	17.0%	17	1.0%	1	0.0%	0
Tesco Express, Longridge Road, Preston	0.4%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1
Tesco Express, Market Way, Blackburn	0.6%	3	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0
Tesco, Duck Street, Clitheroe	7.8%	39	11.0%	11	22.0%	22	5.0%	5	1.0%	1	0.0%	0
Tesco, Hill Street, Blackburn	0.8%	4	0.0%	0	1.0%	1	0.0%	0	3.0%	3	0.0%	0
Tesco, Queen Street, Great Harwood	1.8%	9	0.0%	0	0.0%	0	8.0%	8	1.0%	1	0.0%	0
Tesco, Wyre Street, Padiham	0.4%	2	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Whalley Town Centre	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Whiteheads, Park Street, Great Harwood	0.4%	2	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Local shops, Accrington	0.4%	2	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0
Local shops, Blackburn	2.0%	10	1.0%	1	0.0%	0	1.0%	1	8.0%	8	0.0%	0
Local shops, Clitheroe	4.6%	23	6.0%	6	15.0%	15	2.0%	2	0.0%	0	0.0%	0
Local shops, Great Harwood	0.6%	3	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0
Local shops, Longridge	3.0%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	15.0%	15
Local shops, Padiham	0.6%	3	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0
Local shops, Preston	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3
Local shops, Whalley	0.6%	3	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0
Internet	0.4%	2	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0
Aldi, Bolton Road, Blackpool	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Asda, Bolton Road, Pendlebury	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Booths, Park Hill Road, Garstang	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Co-op, Berry Lane, Longridge	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Co-op, Preston New Road,	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Blackburn												
Co-op, Whalley New Road, Brownhill, Blackburn	1.2%	6	0.0%	0	0.0%	0	0.0%	0	6.0%	6	0.0%	0
Co-op, Whalley Road, Clitheroe	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Lidl, Whalley Banks, Blackburn	0.6%	3	0.0%	0	0.0%	0	1.0%	1	2.0%	2	0.0%	0
Local shops, Arnside	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Local shops, Billsborough	0.4%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1
Local shops, Chatburn	1.6%	8	7.0%	7	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Chipping	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Local shops, Goosnargh	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Local shops, Grimsargh	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Local shops, Langho	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Local shops, Lymm	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Local shops, Mellor	0.8%	4	0.0%	0	0.0%	0	0.0%	0	4.0%	4	0.0%	0
Local shops, Ribchester	0.6%	3	1.0%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Local shops, Sabden	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Local shops, Slaidburn	0.8%	4	4.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Wilpshire	0.4%	2	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0
Marks & Spencer, Fishergate, Preston	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Marks & Spencer, King William Street, Blackburn	0.4%	2	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0
Sainsbury's, Park Hill Road, Garstang	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Spar, Edisford Road, Clitheroe	1.8%	9	2.0%	2	6.0%	6	1.0%	1	0.0%	0	0.0%	0
Spar, Portland Road, Langho	1.2%	6	0.0%	0	0.0%	0	0.0%	0	6.0%	6	0.0%	0
Tesco Express, Roe Lee Retail Centre, Whalley Lee Road, Blackburn	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Tesco, Syke Street, Haslingden	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Waitrose, Capitol Centre, Walton Le Dale	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
(Don’t know / can't remember)	1.2%	6	2.0%	2	0.0%	0	2.0%	2	1.0%	1	1.0%	1
(Don't do top-up shopping)	21.0%	105	37.0%	37	11.0%	11	10.0%	10	32.0%	32	15.0%	15
Base:		500		100		100		100		100		100

Q07 In which town or location do you buy most of your household's non-food shopping?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Accrington Town Centre	3.4%	17	2.0%	2	0.0%	0	13.0%	13	2.0%	2	0.0%	0
Blackburn Town Centre	19.4%	97	3.0%	3	19.0%	19	26.0%	26	45.0%	45	4.0%	4
Burnley Town Centre	3.2%	16	4.0%	4	4.0%	4	7.0%	7	1.0%	1	0.0%	0
Clitheroe Town Centre	29.8%	149	59.0%	59	47.0%	47	25.0%	25	18.0%	18	0.0%	0
Colne Town Centre	0.6%	3	1.0%	1	1.0%	1	0.0%	0	1.0%	1	0.0%	0
Deepdale Retail Park	1.0%	5	0.0%	0	1.0%	1	0.0%	0	0.0%	0	4.0%	4
Great Harwood Town Centre	2.0%	10	0.0%	0	0.0%	0	8.0%	8	2.0%	2	0.0%	0
Longridge Town Centre	6.2%	31	0.0%	0	0.0%	0	1.0%	1	1.0%	1	29.0%	29
Manchester City Centre	2.8%	14	3.0%	3	3.0%	3	3.0%	3	4.0%	4	1.0%	1
Preston City Centre	15.0%	75	6.0%	6	7.0%	7	2.0%	2	11.0%	11	49.0%	49
Skipton Town Centre	2.0%	10	7.0%	7	2.0%	2	1.0%	1	0.0%	0	0.0%	0
Whalley Town Centre	0.4%	2	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0
Asda, Pittman Way, Fulwood, Preston	1.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	5
Tesco, Duck Street, Clitheroe	1.4%	7	5.0%	5	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Tesco, Hill Street, Blackburn	0.6%	3	0.0%	0	0.0%	0	1.0%	1	2.0%	2	0.0%	0
Tesco, Queen Street, Great Harwood	0.6%	3	0.0%	0	0.0%	0	1.0%	1	2.0%	2	0.0%	0
Tesco, Wyre Street, Padiham	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Internet / mail order / catalogue	5.0%	25	3.0%	3	9.0%	9	5.0%	5	4.0%	4	4.0%	4
Bolton	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Bury	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Chorley	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Cleveleys	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Failsworth	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fulwood	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Harrogate	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Liverpool	0.6%	3	1.0%	1	0.0%	0	0.0%	0	1.0%	1	1.0%	1
Padiham	0.4%	2	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Southport	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don’t know / can't remember)	2.8%	14	3.0%	3	3.0%	3	3.0%	3	4.0%	4	1.0%	1
Base:		500		100		100		100		100		100

Q08 While you were on your last shopping trip for non-food items at (LOCATION MENTIONED AT Q07) did you, (or anyone else with you) carry out any of the following activities? [MR/PR]
Not those who shop online at Q07

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Go to Bank, Post Office, Building society or Cash point	28.2%	134	30.9%	30	23.1%	21	28.4%	27	31.3%	30	27.1%	26
Get Petrol	15.8%	75	14.4%	14	13.2%	12	22.1%	21	14.6%	14	14.6%	14
Shopping for other food items	13.1%	62	21.6%	21	8.8%	8	7.4%	7	12.5%	12	14.6%	14
Shopping for non food items	23.4%	111	42.3%	41	23.1%	21	11.6%	11	22.9%	22	16.7%	16
Window shopping / browsing	13.9%	66	16.5%	16	22.0%	20	9.5%	9	11.5%	11	10.4%	10
Hairdressers, dry cleaners, or other service	2.7%	13	5.2%	5	2.2%	2	1.1%	1	3.1%	3	2.1%	2
Cinema	1.1%	5	2.1%	2	0.0%	0	1.1%	1	1.0%	1	1.0%	1
Theatre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Pub / Bar / Restaurant	8.8%	42	12.4%	12	9.9%	9	7.4%	7	9.4%	9	5.2%	5
Nightclub / Live music	0.4%	2	0.0%	0	0.0%	0	1.1%	1	1.0%	1	0.0%	0
Health & fitness club	0.6%	3	1.0%	1	1.1%	1	0.0%	0	0.0%	0	1.0%	1
Tenpin bowling	0.4%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1
Museums / Galleries / Exhibitions	1.3%	6	1.0%	1	2.2%	2	1.1%	1	1.0%	1	1.0%	1
Libraries	2.3%	11	3.1%	3	5.5%	5	1.1%	1	1.0%	1	1.0%	1
(Nothing else)	44.6%	212	33.0%	32	42.9%	39	50.5%	48	43.8%	42	53.1%	51
Base:		475		97		91		95		96		96

Q09 How do you normally travel to do your non-food shopping?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Car-driver	66.8%	334	69.0%	69	52.0%	52	70.0%	70	77.0%	77	66.0%	66
Car-passenger	11.2%	56	17.0%	17	10.0%	10	5.0%	5	12.0%	12	12.0%	12
Bus / coach	7.2%	36	7.0%	7	4.0%	4	11.0%	11	5.0%	5	9.0%	9
Train	1.4%	7	1.0%	1	4.0%	4	2.0%	2	0.0%	0	0.0%	0
Taxi	0.4%	2	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0
Walk	7.0%	35	2.0%	2	19.0%	19	6.0%	6	0.0%	0	8.0%	8
Bicycle	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Use Internet / get it delivered	5.0%	25	3.0%	3	9.0%	9	5.0%	5	4.0%	4	4.0%	4
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mobility scooter	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
(Don’t know / varies)	0.8%	4	1.0%	1	1.0%	1	0.0%	0	1.0%	1	1.0%	1
Base:		500		100		100		100		100		100

Q10 At which town or location did your household last buy clothes or shoes?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Accrington Town Centre	3.0%	15	4.0%	4	1.0%	1	9.0%	9	1.0%	1	0.0%	0
Blackburn Town Centre	22.6%	113	14.0%	14	22.0%	22	33.0%	33	41.0%	41	3.0%	3
Burnley Town Centre	3.2%	16	3.0%	3	6.0%	6	6.0%	6	0.0%	0	1.0%	1
Clitheroe Town Centre	9.0%	45	20.0%	20	15.0%	15	5.0%	5	3.0%	3	2.0%	2
Colne Town Centre	2.8%	14	7.0%	7	1.0%	1	2.0%	2	3.0%	3	1.0%	1
Deepdale Retail Park	4.0%	20	1.0%	1	3.0%	3	1.0%	1	1.0%	1	14.0%	14
Great Harwood Town Centre	0.4%	2	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Longridge Town Centre	0.6%	3	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.0%	2
Manchester City Centre	7.8%	39	9.0%	9	12.0%	12	7.0%	7	6.0%	6	5.0%	5
Nelson Town Centre	0.4%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Oswaldtwistle Town Centre	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Preston City Centre	16.8%	84	4.0%	4	8.0%	8	7.0%	7	18.0%	18	47.0%	47
Skipton Town Centre	2.0%	10	5.0%	5	2.0%	2	3.0%	3	0.0%	0	0.0%	0
Trafford Centre	2.2%	11	1.0%	1	3.0%	3	2.0%	2	3.0%	3	2.0%	2
Whalley Town Centre	1.8%	9	2.0%	2	1.0%	1	1.0%	1	4.0%	4	1.0%	1
Asda, Hyndburn Road, Accrington	0.4%	2	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Tesco, Eagle Street, Accrington	0.4%	2	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Tesco, Queen Street, Great Harwood	0.4%	2	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Internet / mail order / catalogue	8.2%	41	5.0%	5	13.0%	13	5.0%	5	9.0%	9	9.0%	9
Abroad	0.4%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Arnside, cumbria	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Bedford	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bicester	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Blackpool	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Bury	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Chester	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Chesterfield	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cleveleys	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Edinburgh	0.4%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1
Ellesmere Port	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Failsworth	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Fleetwood	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Garstang	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Harrogate	0.8%	4	2.0%	2	0.0%	0	1.0%	1	1.0%	1	0.0%	0
Haslingden	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hellifield, North Yorkshire	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ilkley	0.4%	2	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0
Kendal	0.4%	2	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Lancaster	0.8%	4	2.0%	2	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Liverpool	0.8%	4	2.0%	2	1.0%	1	0.0%	0	0.0%	0	1.0%	1
London	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Lytham	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Warrington	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
York	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don’t know / can't remember)	4.8%	24	7.0%	7	5.0%	5	4.0%	4	7.0%	7	1.0%	1
(Don't regularly buy these goods)	1.4%	7	2.0%	2	1.0%	1	3.0%	3	1.0%	1	0.0%	0
Base:		500		100		100		100		100		100

Q11 At which town or location did your household last buy domestic electric appliances (e.g. fridges and kitchen items)?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Accrington Town Centre	1.0%	5	1.0%	1	1.0%	1	3.0%	3	0.0%	0	0.0%	0
Blackburn Town Centre	17.8%	89	9.0%	9	17.0%	17	31.0%	31	30.0%	30	2.0%	2
Burnley Town Centre	2.4%	12	1.0%	1	4.0%	4	6.0%	6	1.0%	1	0.0%	0
Clitheroe Town Centre	26.0%	130	59.0%	59	41.0%	41	18.0%	18	11.0%	11	1.0%	1
Colne Town Centre	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Deepdale Retail Park	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3
Great Harwood Town Centre	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Longridge Town Centre	4.0%	20	0.0%	0	0.0%	0	1.0%	1	0.0%	0	19.0%	19
Manchester City Centre	0.4%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1
Nelson Town Centre	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Preston City Centre	10.4%	52	1.0%	1	2.0%	2	3.0%	3	7.0%	7	39.0%	39
Trafford Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Asda, Hyndburn Road, Accrington	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Pittman Way, Fulwood, Preston	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Tesco, Finsley Gate, Burnley	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Queen Street, Great Harwood	0.4%	2	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Internet / mail order / catalogue	16.6%	83	12.0%	12	16.0%	16	14.0%	14	20.0%	20	21.0%	21
Blackpool	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Bluewater, Greenhithe, Kent	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Chester	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Chorley	0.4%	2	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0
Lancaster	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Liverpool	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Newcastle upon Tyne	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Padiham	0.4%	2	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Walton-le-Dale	0.8%	4	0.0%	0	1.0%	1	0.0%	0	2.0%	2	1.0%	1
Whitebirk Retail Park, Blackburn	2.2%	11	0.0%	0	0.0%	0	5.0%	5	6.0%	6	0.0%	0
(Don’t know / can't remember)	7.6%	38	7.0%	7	5.0%	5	7.0%	7	14.0%	14	5.0%	5
(Don't regularly buy these goods)	6.4%	32	6.0%	6	10.0%	10	6.0%	6	7.0%	7	3.0%	3
Base:		500		100		100		100		100		100

Q12 At which town or location did your household last buy other kinds of electric goods such as TV / Hi-Fi and computers?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Accrington Town Centre	1.0%	5	0.0%	0	2.0%	2	3.0%	3	0.0%	0	0.0%	0
Blackburn Town Centre	21.0%	105	15.0%	15	28.0%	28	27.0%	27	34.0%	34	1.0%	1
Burnley Town Centre	3.2%	16	7.0%	7	4.0%	4	5.0%	5	0.0%	0	0.0%	0
Clitheroe Town Centre	14.4%	72	31.0%	31	22.0%	22	12.0%	12	7.0%	7	0.0%	0
Colne Town Centre	0.4%	2	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Deepdale Retail Park	2.2%	11	1.0%	1	0.0%	0	0.0%	0	1.0%	1	9.0%	9
Great Harwood Town Centre	1.0%	5	1.0%	1	0.0%	0	3.0%	3	1.0%	1	0.0%	0
Longridge Town Centre	1.2%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	6
Manchester City Centre	1.2%	6	0.0%	0	3.0%	3	0.0%	0	1.0%	1	2.0%	2
Nelson Town Centre	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Preston City Centre	12.8%	64	3.0%	3	5.0%	5	4.0%	4	8.0%	8	44.0%	44
Rishton Town Centre	0.4%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1
Trafford Centre	0.8%	4	1.0%	1	1.0%	1	0.0%	0	1.0%	1	1.0%	1
Tesco, Duck Street, Clitheroe	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Finsley Gate, Burnley	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Hill Street, Blackburn	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Tesco, Queen Street, Great Harwood	0.8%	4	0.0%	0	0.0%	0	4.0%	4	0.0%	0	0.0%	0
Internet / mail order / catalogue	18.8%	94	11.0%	11	20.0%	20	21.0%	21	22.0%	22	20.0%	20
Barrowford	0.4%	2	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bradford	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Cheadle	0.4%	2	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chorley	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Lancaster	0.4%	2	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Leicester	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Liverpool	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Newcastle upon Tyne	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Padiham	0.4%	2	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Walton-le-Dale	0.6%	3	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.0%	2
Whitebirk Retail Park, Blackburn	2.2%	11	1.0%	1	2.0%	2	4.0%	4	4.0%	4	0.0%	0
(Don’t know / can't remember)	4.6%	23	4.0%	4	2.0%	2	4.0%	4	8.0%	8	5.0%	5
(Don't regularly buy these goods)	10.0%	50	15.0%	15	9.0%	9	9.0%	9	11.0%	11	6.0%	6
Base:		500		100		100		100		100		100

Q13 At which town or location did your household last buy furniture, soft furnishings or floor-coverings?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Accrington Town Centre	3.8%	19	2.0%	2	4.0%	4	10.0%	10	3.0%	3	0.0%	0
Blackburn Town Centre	13.6%	68	7.0%	7	13.0%	13	22.0%	22	23.0%	23	3.0%	3
Burnley Town Centre	1.8%	9	1.0%	1	4.0%	4	3.0%	3	1.0%	1	0.0%	0
Clitheroe Town Centre	18.6%	93	35.0%	35	34.0%	34	13.0%	13	9.0%	9	2.0%	2
Colne Town Centre	0.6%	3	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0
Longridge Town Centre	1.8%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.0%	9
Manchester City Centre	1.8%	9	1.0%	1	4.0%	4	0.0%	0	2.0%	2	2.0%	2
Nelson Town Centre	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Oswaldtwistle Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Preston City Centre	12.2%	61	4.0%	4	4.0%	4	4.0%	4	10.0%	10	39.0%	39
Skipton Town Centre	0.4%	2	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Trafford Centre	0.4%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1
Whalley Town Centre	0.4%	2	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Asda, Princess Way, Burnley	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Tesco, Eagle Street, Accrington	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Internet / mail order / catalogue	6.6%	33	7.0%	7	7.0%	7	6.0%	6	5.0%	5	8.0%	8
Ashton-on-Ribble	0.6%	3	1.0%	1	2.0%	2	0.0%	0	0.0%	0	0.0%	0
B&Q, Bolton Road, Blackburn	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Bamber Bridge	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Bolton	1.8%	9	0.0%	0	2.0%	2	1.0%	1	3.0%	3	3.0%	3
Chatburn	0.4%	2	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chorley	0.6%	3	0.0%	0	0.0%	0	0.0%	0	2.0%	2	1.0%	1
Darwen	0.4%	2	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0
Failsworth	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fleetwood	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Grindleton	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Hexham	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Ilkley	0.4%	2	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0
Lancaster	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Liverpool	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Lytham	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Padiham	0.6%	3	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0
Portsmouth	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Southport	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Walton-le-Dale	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Warrington	1.0%	5	1.0%	1	1.0%	1	0.0%	0	0.0%	0	3.0%	3
Whitebirk Retail Park, Blackburn	0.8%	4	0.0%	0	0.0%	0	4.0%	4	0.0%	0	0.0%	0
York	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don’t know / can't remember)	12.2%	61	14.0%	14	11.0%	11	10.0%	10	10.0%	10	16.0%	16
(Don't regularly buy these goods)	15.6%	78	20.0%	20	12.0%	12	21.0%	21	19.0%	19	6.0%	6
Base:		500		100		100		100		100		100

Q14 At which town or location did your household last buy DIY / hardware items and garden items?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Accrington Town Centre	1.8%	9	0.0%	0	1.0%	1	8.0%	8	0.0%	0	0.0%	0
Barrow Town Centre	0.6%	3	1.0%	1	0.0%	0	0.0%	0	2.0%	2	0.0%	0
Blackburn Town Centre	15.4%	77	2.0%	2	4.0%	4	23.0%	23	44.0%	44	4.0%	4
Burnley Town Centre	1.2%	6	1.0%	1	1.0%	1	4.0%	4	0.0%	0	0.0%	0
Clitheroe Town Centre	40.6%	203	72.0%	72	76.0%	76	36.0%	36	16.0%	16	3.0%	3
Colne Town Centre	0.4%	2	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Deepdale Retail Park	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Longridge Town Centre	4.4%	22	0.0%	0	0.0%	0	0.0%	0	0.0%	0	22.0%	22
Nelson Town Centre	0.4%	2	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Preston City Centre	10.0%	50	1.0%	1	1.0%	1	1.0%	1	5.0%	5	42.0%	42
Skipton Town Centre	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Whalley Town Centre	1.0%	5	0.0%	0	0.0%	0	2.0%	2	3.0%	3	0.0%	0
Internet / mail order / catalogue	2.4%	12	0.0%	0	4.0%	4	2.0%	2	3.0%	3	3.0%	3
B&Q, Bolton Road, Blackburn	1.4%	7	1.0%	1	0.0%	0	2.0%	2	4.0%	4	0.0%	0
Bamber Bridge	1.2%	6	0.0%	0	0.0%	0	0.0%	0	1.0%	1	5.0%	5
Billsborough	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Blackpool	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Bury	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Chatburn	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chorley	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Cleveleys	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Ewood	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Fulwood	0.6%	3	0.0%	0	0.0%	0	1.0%	1	0.0%	0	2.0%	2
Newcastle upon Tyne	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Padiham	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Rawtenstall	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
(Don’t know / can't remember)	3.4%	17	2.0%	2	2.0%	2	6.0%	6	5.0%	5	2.0%	2
(Don't regularly buy these goods)	12.6%	63	16.0%	16	10.0%	10	11.0%	11	15.0%	15	11.0%	11
Base:		500		100		100		100		100		100

Q15 At which town or location did your household last buy health, beauty and chemist items?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Accrington Town Centre	1.4%	7	2.0%	2	0.0%	0	4.0%	4	1.0%	1	0.0%	0
Blackburn Town Centre	13.4%	67	1.0%	1	4.0%	4	15.0%	15	45.0%	45	2.0%	2
Burnley Town Centre	1.0%	5	0.0%	0	0.0%	0	5.0%	5	0.0%	0	0.0%	0
Clitheroe Town Centre	39.0%	195	73.0%	73	83.0%	83	26.0%	26	11.0%	11	2.0%	2
Colne Town Centre	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Deepdale Retail Park	2.2%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.0%	11
Great Harwood Town Centre	4.0%	20	1.0%	1	0.0%	0	17.0%	17	2.0%	2	0.0%	0
Longridge Town Centre	7.4%	37	1.0%	1	0.0%	0	1.0%	1	0.0%	0	35.0%	35
Manchester City Centre	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Preston City Centre	9.2%	46	0.0%	0	0.0%	0	2.0%	2	10.0%	10	34.0%	34
Skipton Town Centre	0.4%	2	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Whalley Town Centre	2.8%	14	0.0%	0	0.0%	0	10.0%	10	4.0%	4	0.0%	0
Asda, Hyndburn Road, Accrington	0.4%	2	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0
Asda, Pittman Way, Fulwood, Preston	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Tesco, Duck Street, Clitheroe	1.0%	5	3.0%	3	1.0%	1	1.0%	1	0.0%	0	0.0%	0
Tesco, Finsley Gate, Burnley	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Hill Street, Blackburn	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Tesco, Queen Street, Great Harwood	1.2%	6	0.0%	0	0.0%	0	6.0%	6	0.0%	0	0.0%	0
Tesco, Wyre Street, Padiham	0.4%	2	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Internet / mail order / catalogue	2.2%	11	2.0%	2	3.0%	3	1.0%	1	3.0%	3	2.0%	2
Abroad	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Barnoldswick	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Blackpool	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Bolton	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Chatburn	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cheadle	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Chorley	0.4%	2	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0
Cleveleys	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Garstang	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Goosnargh	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Grimsargh	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Lancaster	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Langho	0.8%	4	0.0%	0	0.0%	0	0.0%	0	4.0%	4	0.0%	0
Liverpool	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
London	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Mellor	1.0%	5	0.0%	0	0.0%	0	0.0%	0	5.0%	5	0.0%	0
Padiham	0.4%	2	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Portsmouth	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Rawtenstall	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
(Don’t know / can't remember)	2.2%	11	1.0%	1	2.0%	2	2.0%	2	2.0%	2	4.0%	4
(Don't regularly buy these goods)	5.0%	25	7.0%	7	6.0%	6	1.0%	1	8.0%	8	3.0%	3
Base:		500		100		100		100		100		100

Q16 At which town or location did your household last buy other non-food items such as books, CDs, toys and gifts?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Accrington Town Centre	1.2%	6	2.0%	2	0.0%	0	4.0%	4	0.0%	0	0.0%	0
Blackburn Town Centre	9.4%	47	2.0%	2	7.0%	7	13.0%	13	23.0%	23	2.0%	2
Burnley Town Centre	0.8%	4	2.0%	2	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Clitheroe Town Centre	18.2%	91	31.0%	31	35.0%	35	17.0%	17	8.0%	8	0.0%	0
Deepdale Retail Park	1.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	5
Great Harwood Town Centre	1.8%	9	0.0%	0	1.0%	1	6.0%	6	2.0%	2	0.0%	0
Longridge Town Centre	2.2%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.0%	11
Manchester City Centre	1.2%	6	1.0%	1	1.0%	1	2.0%	2	2.0%	2	0.0%	0
Preston City Centre	9.6%	48	6.0%	6	1.0%	1	4.0%	4	7.0%	7	30.0%	30
Skipton Town Centre	0.8%	4	3.0%	3	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Trafford Centre	0.4%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1
Whalley Town Centre	0.4%	2	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0
Asda, Hyndburn Road, Accrington	0.4%	2	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Asda, Pittman Way, Fulwood, Preston	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Asda, Princess Way, Burnley	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Tesco, Duck Street, Clitheroe	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Tesco, Hill Street, Blackburn	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Tesco, Queen Street, Great Harwood	0.6%	3	1.0%	1	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Internet / mail order / catalogue	28.6%	143	21.0%	21	36.0%	36	25.0%	25	34.0%	34	27.0%	27
Abroad	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Bury	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Chatburn	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chorley	0.6%	3	0.0%	0	0.0%	0	1.0%	1	1.0%	1	1.0%	1
Cleveleys	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Harrogate	0.4%	2	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Keighley	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Liverpool	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Llandudno	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Southport	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
(Don't know / can't remember)	5.2%	26	3.0%	3	3.0%	3	9.0%	9	4.0%	4	7.0%	7
(Don't regularly buy these goods)	14.6%	73	22.0%	22	12.0%	12	11.0%	11	16.0%	16	12.0%	12
Base:		500		100		100		100		100		100

Q17 At which of the following town centres do you visit the shops, services or markets? [MR/PR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Clitheroe	77.2%	386	99.0%	99	99.0%	99	66.0%	66	72.0%	72	50.0%	50
Longridge	24.4%	122	9.0%	9	5.0%	5	10.0%	10	17.0%	17	81.0%	81
Whalley	31.6%	158	30.0%	30	20.0%	20	50.0%	50	45.0%	45	13.0%	13
(None of these centres)	12.2%	61	0.0%	0	1.0%	1	23.0%	23	23.0%	23	14.0%	14
Base:		500		100		100		100		100		100

Q18 How often do you visit shops, services or markets in Clitheroe?
Those who go to Clitheroe at Q17

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Everyday	9.8%	38	11.1%	11	24.2%	24	4.5%	3	0.0%	0	0.0%	0
2-3 times a week	25.4%	98	34.3%	34	41.4%	41	19.7%	13	11.1%	8	4.0%	2
Once a week	29.3%	113	40.4%	40	28.3%	28	30.3%	20	25.0%	18	14.0%	7
Once a fortnight	8.3%	32	5.1%	5	1.0%	1	18.2%	12	15.3%	11	6.0%	3
Once a month	13.5%	52	7.1%	7	3.0%	3	19.7%	13	26.4%	19	20.0%	10
Less than once a month	13.5%	52	2.0%	2	2.0%	2	7.6%	5	22.2%	16	54.0%	27
(Don't know)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Refused)	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1
Base:		386		99		99		66		72		50

Q19 What, if anything, would make you visit Clitheroe town centre more often? [MR]
Those who go to Clitheroe at Q17

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5
Nothing	45.1%	174	45.5%	45	31.3%	31	43.9%	29	56.9%	41	56.0%	28
Better choice of clothing shops	4.4%	17	1.0%	1	6.1%	6	6.1%	4	5.6%	4	4.0%	2
Better choice of shops in general	20.2%	78	19.2%	19	30.3%	30	19.7%	13	20.8%	15	2.0%	1
Better maintenance / cleanliness	1.3%	5	3.0%	3	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Better quality shops	6.5%	25	10.1%	10	12.1%	12	1.5%	1	0.0%	0	4.0%	2
Better market	1.3%	5	1.0%	1	1.0%	1	1.5%	1	1.4%	1	2.0%	1
Improved bus services	1.8%	7	1.0%	1	2.0%	2	3.0%	2	0.0%	0	4.0%	2
More car parking	16.1%	62	21.2%	21	13.1%	13	16.7%	11	12.5%	9	16.0%	8
More food supermarkets	0.8%	3	0.0%	0	0.0%	0	0.0%	0	1.4%	1	4.0%	2
More large shops	2.1%	8	2.0%	2	1.0%	1	4.5%	3	1.4%	1	2.0%	1
More traffic free areas / pedestrianisation	3.1%	12	2.0%	2	9.1%	9	0.0%	0	1.4%	1	0.0%	0
Free car parking	4.7%	18	6.1%	6	5.1%	5	6.1%	4	4.2%	3	0.0%	0
Less charity shops	2.3%	9	1.0%	1	8.1%	8	0.0%	0	0.0%	0	0.0%	0
Presence of Marks & Spencer	1.6%	6	2.0%	2	0.0%	0	4.5%	3	0.0%	0	2.0%	1
Improvements to the road system	1.6%	6	1.0%	1	2.0%	2	3.0%	2	0.0%	0	2.0%	1
Better opening hours	0.5%	2	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don’t know)	3.4%	13	1.0%	1	4.0%	4	3.0%	2	1.4%	1	10.0%	5
Base:		386		99		99		66		72		50

Q20 How often do you visit shops, services or markets in Longridge?
Those who go to Longridge at Q17

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5
Everyday	21.3%	26	0.0%	0	0.0%	0	10.0%	1	11.8%	2	28.4%	23
2-3 times a week	26.2%	32	22.2%	2	0.0%	0	10.0%	1	0.0%	0	35.8%	29
Once a week	19.7%	24	11.1%	1	0.0%	0	20.0%	2	17.6%	3	22.2%	18
Once a fortnight	5.7%	7	0.0%	0	20.0%	1	0.0%	0	5.9%	1	6.2%	5
Once a month	8.2%	10	22.2%	2	20.0%	1	10.0%	1	23.5%	4	2.5%	2
Less than once a month	17.2%	21	44.4%	4	60.0%	3	40.0%	4	41.2%	7	3.7%	3
(Don't know)	0.8%	1	0.0%	0	0.0%	0	10.0%	1	0.0%	0	0.0%	0
(Refused)	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Base:		122		9		5		10		17		81

Q21 What, if anything, would make you visit Longridge town centre more often? [MR]
Those who go to Longridge at Q17

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5
Nothing	55.7%	68	100.0%	9	100.0%	5	80.0%	8	70.6%	12	42.0%	34
Better choice of clothing shops	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	2
Better choice of shops in general	8.2%	10	0.0%	0	0.0%	0	10.0%	1	5.9%	1	9.9%	8
Better maintenance / cleanliness	4.1%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.2%	5
Better quality shops	3.3%	4	0.0%	0	0.0%	0	0.0%	0	5.9%	1	3.7%	3
Better market	3.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	4
More car parking	7.4%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.1%	9
More food supermarkets	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Presence of a swimming pool	4.1%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.2%	5
Presence of public toilets	6.6%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.9%	8
Improvements to the road system	4.1%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.2%	5
Free car parking	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
(Don’t know)	9.8%	12	0.0%	0	0.0%	0	10.0%	1	17.6%	3	9.9%	8
Base:		122		9		5		10		17		81

Q22 How often do you visit shops, services or markets in Whalley?
Those who go to Whalley at Q17

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Everyday	5.7%	9	0.0%	0	5.0%	1	14.0%	7	2.2%	1	0.0%	0
2-3 times a week	12.0%	19	6.7%	2	10.0%	2	20.0%	10	11.1%	5	0.0%	0
Once a week	13.3%	21	3.3%	1	0.0%	0	18.0%	9	24.4%	11	0.0%	0
Once a fortnight	11.4%	18	13.3%	4	10.0%	2	14.0%	7	11.1%	5	0.0%	0
Once a month	23.4%	37	30.0%	9	45.0%	9	14.0%	7	26.7%	12	0.0%	0
Less than once a month	33.5%	53	46.7%	14	30.0%	6	20.0%	10	22.2%	10	100.0%	13
(Don't know)	0.6%	1	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0
(Refused)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Base:		158		30		20		50		45		13

Q23 What, if anything, would make you visit Whalley town centre more often? [MR]
Those who go to Whalley at Q17

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Nothing	56.3%	89	60.0%	18	45.0%	9	56.0%	28	53.3%	24	76.9%	10
Better choice of clothing shops	1.3%	2	3.3%	1	0.0%	0	2.0%	1	0.0%	0	0.0%	0
Better choice of shops in general	7.6%	12	6.7%	2	0.0%	0	6.0%	3	15.6%	7	0.0%	0
Better maintenance / cleanliness	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.7%	1
Better market	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.7%	1
Improved bus services	0.6%	1	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0
More car parking	22.2%	35	16.7%	5	35.0%	7	20.0%	10	26.7%	12	7.7%	1
More traffic free areas / pedestrianisation	5.1%	8	6.7%	2	5.0%	1	6.0%	3	4.4%	2	0.0%	0
Presence of a cinema	0.6%	1	0.0%	0	5.0%	1	0.0%	0	0.0%	0	0.0%	0
Free car parking	3.2%	5	3.3%	1	10.0%	2	2.0%	1	2.2%	1	0.0%	0
Better range of leisure / social activities	1.9%	3	3.3%	1	0.0%	0	4.0%	2	0.0%	0	0.0%	0
Better opening hours	0.6%	1	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0
Less traffic congestion	1.3%	2	0.0%	0	5.0%	1	2.0%	1	0.0%	0	0.0%	0
(Don’t know)	1.9%	3	0.0%	0	0.0%	0	2.0%	1	2.2%	1	7.7%	1
Base:		158		30		20		50		45		13

Q24 What things, if any, do you regularly buy on the internet? [MR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Nothing	39.0%	195	51.0%	51	31.0%	31	42.0%	42	36.0%	36	35.0%	35
Groceries	3.8%	19	2.0%	2	2.0%	2	4.0%	4	5.0%	5	6.0%	6
Clothes and shoes	26.4%	132	21.0%	21	37.0%	37	25.0%	25	30.0%	30	19.0%	19
Domestic electrical appliances	4.8%	24	8.0%	8	4.0%	4	3.0%	3	3.0%	3	6.0%	6
Electrical TV, Hi-Fi and computers	14.2%	71	12.0%	12	21.0%	21	11.0%	11	12.0%	12	15.0%	15
Furniture, soft furnishings and floor coverings	2.6%	13	1.0%	1	2.0%	2	2.0%	2	5.0%	5	3.0%	3
DIY, hardware and homewares	4.6%	23	6.0%	6	6.0%	6	4.0%	4	0.0%	0	7.0%	7
Health and beauty, chemist items	3.4%	17	1.0%	1	1.0%	1	3.0%	3	10.0%	10	2.0%	2
Books, CDs, toys etc.	36.8%	184	27.0%	27	43.0%	43	37.0%	37	35.0%	35	42.0%	42
Travel goods (tickets, holidays etc)	3.2%	16	4.0%	4	6.0%	6	1.0%	1	3.0%	3	2.0%	2
Computer software / electronic games	2.8%	14	2.0%	2	1.0%	1	3.0%	3	2.0%	2	6.0%	6
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sports equipment	0.8%	4	0.0%	0	4.0%	4	0.0%	0	0.0%	0	0.0%	0
Camping equipment	0.4%	2	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Cars	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
(Don't know / can't remember / varies)	6.0%	30	3.0%	3	8.0%	8	3.0%	3	6.0%	6	10.0%	10
Base:		500		100		100		100		100		100

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	

Q25 Do you or your family do any of the following leisure activities? [MR/PR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Cinema	48.4%	242	43.0%	43	47.0%	47	46.0%	46	53.0%	53	53.0%	53
Theatre	35.6%	178	44.0%	44	30.0%	30	25.0%	25	40.0%	40	39.0%	39
Pub / Bar / Restaurant	72.8%	364	74.0%	74	71.0%	71	72.0%	72	73.0%	73	74.0%	74
Nightclub / live music	19.8%	99	19.0%	19	19.0%	19	16.0%	16	19.0%	19	26.0%	26
Bingo	3.8%	19	3.0%	3	5.0%	5	5.0%	5	1.0%	1	5.0%	5
Health & Fitness club	25.6%	128	20.0%	20	32.0%	32	29.0%	29	22.0%	22	25.0%	25
Tenpin bowling	13.0%	65	7.0%	7	17.0%	17	19.0%	19	10.0%	10	12.0%	12
(None of these)	12.4%	62	16.0%	16	8.0%	8	14.0%	14	14.0%	14	10.0%	10
(Don't know)	0.8%	4	1.0%	1	2.0%	2	1.0%	1	0.0%	0	0.0%	0
Base:		500		100		100		100		100		100

Q26 Where did you or your family last visit the cinema?
Those who go to the cinema at Q25

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Accrington Town Centre	5.8%	14	11.6%	5	4.3%	2	13.0%	6	1.9%	1	0.0%	0
Blackburn Town Centre	15.3%	37	9.3%	4	14.9%	7	21.7%	10	28.3%	15	1.9%	1
Burnley Town Centre	9.5%	23	18.6%	8	12.8%	6	17.4%	8	1.9%	1	0.0%	0
Clitheroe Town Centre	1.2%	3	2.3%	1	0.0%	0	2.2%	1	1.9%	1	0.0%	0
Longridge Town Centre	5.4%	13	4.7%	2	0.0%	0	2.2%	1	0.0%	0	18.9%	10
Manchester City Centre	2.5%	6	0.0%	0	4.3%	2	0.0%	0	5.7%	3	1.9%	1
Preston City Centre	7.4%	18	9.3%	4	2.1%	1	2.2%	1	7.5%	4	15.1%	8
Skipton Town Centre	0.8%	2	4.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Trafford Centre	0.8%	2	0.0%	0	2.1%	1	0.0%	0	1.9%	1	0.0%	0
Odeon, Port Way, Preston	1.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.5%	4
The Grand, York Street, Clitheroe	2.1%	5	2.3%	1	8.5%	4	0.0%	0	0.0%	0	0.0%	0
The Palace, Market Place, Longridge	7.4%	18	2.3%	1	0.0%	0	0.0%	0	0.0%	0	32.1%	17
Vue, Lower Audley Street Peel Leisure And Retail Park, Blackburn	21.5%	52	14.0%	6	40.4%	19	17.4%	8	34.0%	18	1.9%	1
Vue, The Capital Centre London Way, Preston,	8.3%	20	7.0%	3	0.0%	0	4.3%	2	15.1%	8	13.2%	7
Vue, The Viaduct, Accrington	5.8%	14	7.0%	3	8.5%	4	15.2%	7	0.0%	0	0.0%	0
Ambleside	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1
Bolton	0.4%	1	0.0%	0	0.0%	0	2.2%	1	0.0%	0	0.0%	0
Cleveleys	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1
Grindleton	0.8%	2	4.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Keighley	0.4%	1	2.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Portmouth	0.4%	1	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0
Walton-le-Dale	0.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	2
(Don't know / can't remember)	0.8%	2	0.0%	0	2.1%	1	2.2%	1	0.0%	0	0.0%	0
Base:		242		43		47		46		53		53

Q27 Where did you or your family last visit the theatre?
Those who go to the theatre at Q25

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Blackburn Town Centre	4.5%	8	4.5%	2	3.3%	1	4.0%	1	10.0%	4	0.0%	0
Burnley Town Centre	0.6%	1	2.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Clitheroe Town Centre	4.5%	8	4.5%	2	16.7%	5	0.0%	0	2.5%	1	0.0%	0
Longridge Town Centre	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	1
Manchester City Centre	55.6%	99	54.5%	24	46.7%	14	76.0%	19	55.0%	22	51.3%	20
Oswaldtwistle Town Centre	1.1%	2	0.0%	0	0.0%	0	0.0%	0	5.0%	2	0.0%	0
Preston City Centre	3.9%	7	2.3%	1	0.0%	0	0.0%	0	0.0%	0	15.4%	6
Burnley Mechanics Theatre, Manchester Road, Burnley	0.6%	1	0.0%	0	3.3%	1	0.0%	0	0.0%	0	0.0%	0
King Georges Hall, Blackburn	1.1%	2	2.3%	1	3.3%	1	0.0%	0	0.0%	0	0.0%	0
The Grand, York Street, Clitheroe	6.2%	11	9.1%	4	13.3%	4	4.0%	1	5.0%	2	0.0%	0
The Thwaites Empire, Aqueduct Road, Blackburn	1.1%	2	2.3%	1	0.0%	0	0.0%	0	0.0%	0	2.6%	1
Blackpool	2.2%	4	0.0%	0	3.3%	1	0.0%	0	2.5%	1	5.1%	2
Harrogate	0.6%	1	2.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lancaster	2.2%	4	0.0%	0	3.3%	1	4.0%	1	0.0%	0	5.1%	2
Liverpool	1.7%	3	0.0%	0	0.0%	0	0.0%	0	5.0%	2	2.6%	1
London	5.6%	10	6.8%	3	6.7%	2	4.0%	1	2.5%	1	7.7%	3
Oldham	0.6%	1	0.0%	0	0.0%	0	0.0%	0	2.5%	1	0.0%	0
Portmouth	0.6%	1	0.0%	0	0.0%	0	0.0%	0	2.5%	1	0.0%	0
Ribchester	1.1%	2	2.3%	1	0.0%	0	0.0%	0	0.0%	0	2.6%	1
Salford	1.1%	2	2.3%	1	0.0%	0	0.0%	0	0.0%	0	2.6%	1
Sheffield	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	1
Stratford-upon-Avon	0.6%	1	2.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don’t know / can't remember)	3.4%	6	2.3%	1	0.0%	0	8.0%	2	7.5%	3	0.0%	0
Base:		178		44		30		25		40		39

Q28 Where did you or your family last visit a pub / bar / restaurant?
Those who go to a pub / bar / restaurant at Q25

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Accrington Town Centre	0.3%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Barrow Town Centre	1.1%	4	0.0%	0	0.0%	0	4.2%	3	1.4%	1	0.0%	0
Blackburn Town Centre	5.8%	21	0.0%	0	0.0%	0	5.6%	4	21.9%	16	1.4%	1
Burnley Town Centre	1.4%	5	0.0%	0	2.8%	2	2.8%	2	1.4%	1	0.0%	0
Clitheroe Town Centre	30.2%	110	39.2%	29	74.6%	53	25.0%	18	11.0%	8	2.7%	2
Great Harwood Town Centre	2.7%	10	0.0%	0	0.0%	0	11.1%	8	2.7%	2	0.0%	0
Longridge Town Centre	10.4%	38	0.0%	0	1.4%	1	1.4%	1	1.4%	1	47.3%	35
Manchester City Centre	3.0%	11	1.4%	1	4.2%	3	1.4%	1	6.8%	5	1.4%	1
Preston City Centre	3.6%	13	1.4%	1	1.4%	1	0.0%	0	6.8%	5	8.1%	6
Skipton Town Centre	0.3%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Whalley Town Centre	4.1%	15	0.0%	0	0.0%	0	16.7%	12	4.1%	3	0.0%	0
Ambleside	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Barrowford	0.3%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Barton	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	2
Bashall Eaves	0.3%	1	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bilsborrow	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	2
Bolton by Bowland	1.1%	4	4.1%	3	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Bradford	0.8%	3	2.7%	2	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Broughton	0.3%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Bury	0.3%	1	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Buxton	0.3%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Charnock Richard	0.3%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Chatburn	0.5%	2	2.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cheltenham	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Chipping	0.8%	3	0.0%	0	1.4%	1	0.0%	0	0.0%	0	2.7%	2
Clayton-le-Dale	0.3%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Clayton-le-Moors	0.3%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Cleveleys	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Darwen	0.5%	2	0.0%	0	0.0%	0	0.0%	0	2.7%	2	0.0%	0
Downham	0.5%	2	2.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fulwood	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	2
Garstang	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Grimsargh	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	2
Grindleton	1.6%	6	5.4%	4	0.0%	0	0.0%	0	0.0%	0	2.7%	2
Hapton	0.3%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Hull	0.3%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Hurst Green	0.5%	2	0.0%	0	0.0%	0	1.4%	1	0.0%	0	1.4%	1
Ingleton	0.3%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Lancaster	0.3%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Langho	1.6%	6	0.0%	0	0.0%	0	1.4%	1	6.8%	5	0.0%	0
Liverpool	0.3%	1	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
London	0.3%	1	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Lytham	0.5%	2	1.4%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Mellor	2.7%	10	0.0%	0	0.0%	0	0.0%	0	12.3%	9	1.4%	1
Mitton	0.5%	2	1.4%	1	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Padiham	0.8%	3	1.4%	1	0.0%	0	2.8%	2	0.0%	0	0.0%	0
Paythorne	0.3%	1	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Portmouth	0.3%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Ribchester	1.9%	7	1.4%	1	0.0%	0	2.8%	2	2.7%	2	2.7%	2
Rimington	0.3%	1	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sabden	0.5%	2	0.0%	0	0.0%	0	2.8%	2	0.0%	0	0.0%	0
Samlesbury	0.3%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Sawley	0.8%	3	2.7%	2	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Slaidburn	0.5%	2	1.4%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Waddington	2.7%	10	10.8%	8	2.8%	2	0.0%	0	0.0%	0	0.0%	0
Whitewell	0.3%	1	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Withnell	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Worston	1.4%	5	2.7%	2	1.4%	1	1.4%	1	1.4%	1	0.0%	0
York	0.3%	1	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	7.1%	26	12.2%	9	2.8%	2	4.2%	3	6.8%	5	9.5%	7
Base:		364		74		71		72		73		74

Column %ges.

Q29 Where did you or your family last visit a nightclub / live music venue?
Those who go to a nightclub / live music venue at Q25

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Accrington Town Centre	1.0%	1	0.0%	0	0.0%	0	0.0%	0	5.3%	1	0.0%	0
Barrow Town Centre	2.0%	2	0.0%	0	5.3%	1	6.3%	1	0.0%	0	0.0%	0
Blackburn Town Centre	2.0%	2	0.0%	0	0.0%	0	6.3%	1	5.3%	1	0.0%	0
Burnley Town Centre	3.0%	3	0.0%	0	0.0%	0	18.8%	3	0.0%	0	0.0%	0
Clitheroe Town Centre	29.3%	29	47.4%	9	36.8%	7	31.3%	5	31.6%	6	7.7%	2
Longridge Town Centre	1.0%	1	0.0%	0	0.0%	0	0.0%	0	5.3%	1	0.0%	0
Manchester City Centre	26.3%	26	26.3%	5	42.1%	8	6.3%	1	26.3%	5	26.9%	7
Preston City Centre	14.1%	14	10.5%	2	0.0%	0	0.0%	0	5.3%	1	42.3%	11
Settle Town Centre	1.0%	1	0.0%	0	0.0%	0	6.3%	1	0.0%	0	0.0%	0
Whalley Town Centre	4.0%	4	0.0%	0	0.0%	0	18.8%	3	0.0%	0	3.8%	1
Abroad	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	1
Blackpool	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	1
Liverpool	5.1%	5	0.0%	0	0.0%	0	0.0%	0	15.8%	3	7.7%	2
Mellor	1.0%	1	0.0%	0	0.0%	0	0.0%	0	5.3%	1	0.0%	0
Mitton	1.0%	1	0.0%	0	5.3%	1	0.0%	0	0.0%	0	0.0%	0
(Don’t know / can't remember)	7.1%	7	15.8%	3	10.5%	2	6.3%	1	0.0%	0	3.8%	1
Base:		99		19		19		16		19		26

Q30 Where did you or your family last go to play bingo?
Those who go to bingo at Q25

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Blackburn Town Centre	21.1%	4	33.3%	1	40.0%	2	20.0%	1	0.0%	0	0.0%	0
Burnley Town Centre	5.3%	1	0.0%	0	0.0%	0	20.0%	1	0.0%	0	0.0%	0
Clitheroe Town Centre	15.8%	3	0.0%	0	60.0%	3	0.0%	0	0.0%	0	0.0%	0
Longridge Town Centre	10.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	40.0%	2
Gala Bingo, Ainsworth Street, Blackburn	21.1%	4	0.0%	0	0.0%	0	60.0%	3	100.0%	1	0.0%	0
Gala Bingo, Market Street, Preston	5.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	20.0%	1
Blackpool	5.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	20.0%	1
Chatburn	5.3%	1	33.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chipping	5.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	20.0%	1
Waddington	5.3%	1	33.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Base:		19		3		5		5		1		5

Q31 Where did you or your family last go to a health club / gym?
Those who go to the health club / gym at Q25

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Accrington Town Centre	0.8%	1	0.0%	0	0.0%	0	3.4%	1	0.0%	0	0.0%	0
Barrow Town Centre	0.8%	1	0.0%	0	0.0%	0	3.4%	1	0.0%	0	0.0%	0
Blackburn Town Centre	6.3%	8	5.0%	1	0.0%	0	10.3%	3	18.2%	4	0.0%	0
Burnley Town Centre	1.6%	2	0.0%	0	0.0%	0	6.9%	2	0.0%	0	0.0%	0
Clitheroe Town Centre	23.4%	30	30.0%	6	46.9%	15	20.7%	6	9.1%	2	4.0%	1
Great Harwood Town Centre	3.9%	5	0.0%	0	0.0%	0	17.2%	5	0.0%	0	0.0%	0
Longridge Town Centre	3.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	20.0%	5
Preston City Centre	8.6%	11	0.0%	0	0.0%	0	0.0%	0	4.5%	1	40.0%	10
Rishton Town Centre	0.8%	1	0.0%	0	0.0%	0	0.0%	0	4.5%	1	0.0%	0
Whalley Town Centre	4.7%	6	10.0%	2	0.0%	0	13.8%	4	0.0%	0	0.0%	0
Carter Leisure, Chatburn Road, Clitheroe	7.8%	10	15.0%	3	18.8%	6	0.0%	0	4.5%	1	0.0%	0
Crossfit, Primrose House, Clitheroe	0.8%	1	0.0%	0	3.1%	1	0.0%	0	0.0%	0	0.0%	0
Dunkenhalgh Health & Leisure Club, Blackburn Road, Clayton Le Moors, Accrington	2.3%	3	0.0%	0	3.1%	1	6.9%	2	0.0%	0	0.0%	0
DW Sports Fitness, Lower Audley Street, Blackburn	1.6%	2	0.0%	0	0.0%	0	0.0%	0	9.1%	2	0.0%	0
Longridge Sports Centre, Preston Road, Longridge	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.0%	2
Oakhill Academy, Wiswell Lane, Whalley	1.6%	2	0.0%	0	3.1%	1	0.0%	0	4.5%	1	0.0%	0
Roefield Leisure Centre, Edisford Road, Clitheroe	6.3%	8	0.0%	0	21.9%	7	0.0%	0	4.5%	1	0.0%	0
Barton	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	1
Billington	0.8%	1	0.0%	0	0.0%	0	3.4%	1	0.0%	0	0.0%	0
Blackpool	0.8%	1	0.0%	0	0.0%	0	3.4%	1	0.0%	0	0.0%	0
Bolton	0.8%	1	0.0%	0	0.0%	0	0.0%	0	4.5%	1	0.0%	0
Bradford	2.3%	3	10.0%	2	0.0%	0	3.4%	1	0.0%	0	0.0%	0
Broughton	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	1
Chipping	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.0%	2
Chorley	0.8%	1	0.0%	0	0.0%	0	0.0%	0	4.5%	1	0.0%	0
Gisburn	0.8%	1	5.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hurst Green	0.8%	1	0.0%	0	0.0%	0	3.4%	1	0.0%	0	0.0%	0
Lancaster	0.8%	1	5.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Langho	0.8%	1	0.0%	0	0.0%	0	3.4%	1	0.0%	0	0.0%	0
Macclesfield	0.8%	1	0.0%	0	0.0%	0	0.0%	0	4.5%	1	0.0%	0
Mellor	1.6%	2	0.0%	0	0.0%	0	0.0%	0	9.1%	2	0.0%	0
Ribchester	0.8%	1	5.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Samlesbury	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	1
Sawley	0.8%	1	0.0%	0	0.0%	0	0.0%	0	4.5%	1	0.0%	0
Waddington	0.8%	1	0.0%	0	3.1%	1	0.0%	0	0.0%	0	0.0%	0
Walton-le-Dale	0.8%	1	0.0%	0	0.0%	0	0.0%	0	4.5%	1	0.0%	0
Worston	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	1
(Don't know / can't remember)	4.7%	6	15.0%	3	0.0%	0	0.0%	0	9.1%	2	4.0%	1
Base:		128		20		32		29		22		25

Q32 Where did you or your family last go for tenpin bowling?
Those who go to tenpin bowling at Q25

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Accrington Town Centre	15.4%	10	0.0%	0	11.8%	2	36.8%	7	10.0%	1	0.0%	0
Blackburn Town Centre	16.9%	11	0.0%	0	17.6%	3	21.1%	4	40.0%	4	0.0%	0
Burnley Town Centre	6.2%	4	0.0%	0	11.8%	2	10.5%	2	0.0%	0	0.0%	0
Manchester City Centre	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.3%	1
Preston City Centre	13.8%	9	14.3%	1	5.9%	1	5.3%	1	0.0%	0	50.0%	6
1st Bowl, Finsley Gate, Burnley	6.2%	4	0.0%	0	23.5%	4	0.0%	0	0.0%	0	0.0%	0
1st Bowl, The Viaduct, Hyndburn Rd, Accrington	7.7%	5	0.0%	0	5.9%	1	21.1%	4	0.0%	0	0.0%	0
Bowlplex Bowling, Peel Leisure & Retail Park, Lower Audley Street, Blackburn	23.1%	15	71.4%	5	17.6%	3	0.0%	0	50.0%	5	16.7%	2
Blackpool	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.3%	1
Bolton	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.3%	1
Bury	1.5%	1	0.0%	0	5.9%	1	0.0%	0	0.0%	0	0.0%	0
Exmouth, Devon	1.5%	1	0.0%	0	0.0%	0	5.3%	1	0.0%	0	0.0%	0
Kettering	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.3%	1
(Don’t know / can't remember)	1.5%	1	14.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Base:		65		7		17		19		10		12

GEN Gender:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Male	31.8%	159	26.0%	26	33.0%	33	31.0%	31	32.0%	32	37.0%	37
Female	68.2%	341	74.0%	74	67.0%	67	69.0%	69	68.0%	68	63.0%	63
Base:		500		100		100		100		100		100

AGE How old are you ?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
18-24	2.0%	10	2.0%	2	2.0%	2	3.0%	3	2.0%	2	1.0%	1
25-34	3.8%	19	2.0%	2	7.0%	7	3.0%	3	2.0%	2	5.0%	5
35-44	13.6%	68	3.0%	3	13.0%	13	16.0%	16	19.0%	19	17.0%	17
45-54	25.6%	128	13.0%	13	39.0%	39	26.0%	26	30.0%	30	20.0%	20
55-64	16.6%	83	24.0%	24	10.0%	10	14.0%	14	18.0%	18	17.0%	17
65+	36.4%	182	54.0%	54	29.0%	29	34.0%	34	28.0%	28	37.0%	37
(Refused)	2.0%	10	2.0%	2	0.0%	0	4.0%	4	1.0%	1	3.0%	3
Base:		500		100		100		100		100		100

LAN Where English is not your first language, please specify your main language:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
No other language / English is my first language	98.0%	490	99.0%	99	99.0%	99	97.0%	97	97.0%	97	98.0%	98
Other language	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gernam	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Hindi	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Polish	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Punjabi	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Russian	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
(Don't know / varies)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Refused)	1.0%	5	1.0%	1	0.0%	0	2.0%	2	0.0%	0	2.0%	2
Base:		500		100		100		100		100		100

DIS Do you consider yourself have a disability? If so, what is the nature of your disability?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
No disabilities	85.6%	428	82.0%	82	82.0%	82	87.0%	87	91.0%	91	86.0%	86
Disability	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Arthritis	1.8%	9	3.0%	3	2.0%	2	2.0%	2	0.0%	0	2.0%	2
Diabetes	0.6%	3	2.0%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Heart condition	1.0%	5	1.0%	1	2.0%	2	0.0%	0	2.0%	2	0.0%	0
Mobility problems	3.0%	15	0.0%	0	3.0%	3	6.0%	6	1.0%	1	5.0%	5
Multiple Sclerosis	0.6%	3	0.0%	0	2.0%	2	0.0%	0	1.0%	1	0.0%	0
Sight issues	1.2%	6	0.0%	0	3.0%	3	1.0%	1	0.0%	0	2.0%	2
Polio	0.4%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Osteoporosis	0.4%	2	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0
Back / spine problems	0.8%	4	1.0%	1	1.0%	1	0.0%	0	1.0%	1	1.0%	1
Pulmonary problems	0.4%	2	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0
Hearing problems	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Epilepsy	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
(Refused)	3.6%	18	9.0%	9	2.0%	2	4.0%	4	1.0%	1	2.0%	2
Base:		500		100		100		100		100		100

QUOTA Zone:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Zone 1	20.0%	100	100.0%	100	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 2	20.0%	100	0.0%	0	100.0%	100	0.0%	0	0.0%	0	0.0%	0
Zone 3	20.0%	100	0.0%	0	0.0%	0	100.0%	100	0.0%	0	0.0%	0
Zone 4	20.0%	100	0.0%	0	0.0%	0	0.0%	0	100.0%	100	0.0%	0
Zone 5	20.0%	100	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	100
Base:		500		100		100		100		100		100

PC Postcode sector:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
BB1 9	8.4%	42	0.0%	0	0.0%	0	0.0%	0	42.0%	42	0.0%	0
BB12 7	2.2%	11	0.0%	0	0.0%	0	11.0%	11	0.0%	0	0.0%	0
BB2 7	7.4%	37	0.0%	0	0.0%	0	0.0%	0	37.0%	37	0.0%	0
BB6 7	6.4%	32	0.0%	0	0.0%	0	32.0%	32	0.0%	0	0.0%	0
BB6 8	4.2%	21	0.0%	0	0.0%	0	0.0%	0	21.0%	21	0.0%	0
BB7 1	9.6%	48	0.0%	0	48.0%	48	0.0%	0	0.0%	0	0.0%	0
BB7 2	10.4%	52	0.0%	0	52.0%	52	0.0%	0	0.0%	0	0.0%	0
BB7 3	7.2%	36	36.0%	36	0.0%	0	0.0%	0	0.0%	0	0.0%	0
BB7 4	12.8%	64	64.0%	64	0.0%	0	0.0%	0	0.0%	0	0.0%	0
BB7 9	11.4%	57	0.0%	0	0.0%	0	57.0%	57	0.0%	0	0.0%	0
PR2 5	1.6%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.0%	8
PR3 2	6.0%	30	0.0%	0	0.0%	0	0.0%	0	0.0%	0	30.0%	30
PR3 3	11.0%	55	0.0%	0	0.0%	0	0.0%	0	0.0%	0	55.0%	55
PR3 5	1.4%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.0%	7
Base:		500		100		100		100		100		100

Appendix 3 Business Occupier Survey

RIBBLE VALLEY BOROUGH COUNCIL BUSINESS OPERATOR SURVEY
PLEASE COMPLETE TODAY – WE WILL COLLECT THE SURVEY THIS AFTERNOON

Ribble Valley Borough Council has commissioned Nathaniel Lichfield & Partners to prepare a Borough-Wide Retail Study. One of the key objectives is to understand the commercial floorspace requirements of existing businesses in the Borough. We would be grateful if you would contribute to this exercise by completing this questionnaire, which we will return to collect later today. All responses will be treated in the strictest confidence.

Q1. What best describes your business?

Retail	
Coffee shop/café/restaurant	
Financial service	
Other	

Q2. Is your business?

Independent	
Part of a local group (up to 5 outlets)	
Part of a national group or chain	

Q3. How long, approximately, has your business been trading?

Less than 12 months	
1 to 5 years	
6 to 10 years	
Over 10 years	

Q4. What type of customers does your business primarily rely on?

Local residents	
Residents from across Ribble Valley	
Other residents of Lancashire	
Specialist buyers (i.e. for your specialist product)	
Office employees	

Q5. Do your existing premises meet your requirements?

Yes	
No	

Q6. Does your company have a requirement for more floorspace in Ribble Valley?

Yes, additional premises	
Yes, replacement premises	
Yes, extend existing premises	
No	

Q7. What is the main reason why you are **not** looking for more floorspace in Ribble Valley?

No commercial justification	
Lack of finance for investment	
Other	

For which centre(s) do you have a space requirement? Tick Relevant Boxes

	New Unit	Expanded Units
Clitheroe		
Longridge		
Whalley		
Other		

Q9. About how much space do you require? ……………………sq. ft / ……………………sq. m

Q10. What has prevented you from securing this requirement to date?

Lack of finance for investment	
Lack of available premises/space	
Other	

If you have any questions about this survey, please contact Craig Matthews at the Council on 01200 425 111.

Thank you for your time and assistance

Appendix 4 Analysis of Shopping Patterns & Retail Capacity

Nathaniel Lichfield & Partners Limited
Ribble Valley Retail Study Update

Table 1: Population Growth

Sub Zone		Population 2011	2013	2018	2023	2028	Change 13-'18	13-'23	13-'28
1	Forest of Bowland Rural Area	7,894	7,955	8,140	8,368	8,665	185	412	710
2	Clitheroe Area	14,768	14,882	15,228	15,654	16,211	345	772	1,328
3	Whalley Area	26,753	26,960	27,585	28,358	29,366	626	1,398	2,406
4	A59 Corridor	21,670	21,838	22,344	22,970	23,787	507	1,132	1,949
5	Longridge Area	20,307	20,464	20,939	21,525	22,291	475	1,061	1,827
TOTAL		**91,392**	**92,098**	**94,236**	**96,874**	**100,319**	**2,137**	**4,775**	**8,221**

Notes:
(i) 2011 Census Population from Experian MMG3 (accessed May 2013)
(ii) Population projected forward using 2011-based Sub-National Population projections [SNPP] for the area, by age and sex. Post 2021, the population growth is influenced by the interaction of trend-based assumption regarding migration and natural change (i.e. births vs. deaths, generated by changes to the Total Fertility Rate [TFR]/Standardised Mortality Rates derived from the ONS 2010-based Interim SNPP).

2011 Prices Inclusive of VAT where applicable

Nathaniel Lichfield & Partners Limited
Ribble Valley Retail Study Update

Table 2a: Convenience Retail Expenditure Growth by Zone

Sub Zone		Convenience Spending per Person (£)					Growth (£)		
		2011	2013	2018	2023	2028	13-'18	13-'23	13-'28
1	Forest of Bowland Rural Area	2,256	2,245	2,273	2,342	2,426	28	97	181
2	Clitheroe Area	1,938	1,928	1,953	2,011	2,084	25	83	156
3	Whalley Area	1,905	1,896	1,920	1,977	2,049	24	81	153
4	A59 Corridor	1,961	1,951	1,975	2,035	2,108	24	84	157
5	Longridge Area	2,025	2,015	2,040	2,102	2,178	25	87	163

Notes:
(i) Experian local estimates for 2011 convenience goods expenditure per person (including retail business e-tailing but excluding other special forms of trading: 1.8% in 2011; 2.3% in 2013; 3.4% in 2018; 4.2% in 2023; and 4.5% in 2027.
(ii) Forecast annual growth rates of: 0.1% ('11-'12); -0.1% ('12-'13); 0% ('13-'14); 0.6% ('14-'19) and 0.8% ('19-'20 and annually thereafter)

2011 Prices Inclusive of VAT where applicable

Nathaniel Lichfield & Partners Limited
Ribble Valley Retail Study Update

Table 2b: Comparison Retail Expenditure Growth by Zone

Sub Zone		Comparison Spending per Person (£) 2011	2013	2018	2023	2028	Growth (£) 13-'18	13-'23	13-'28
1	Forest of Bowland Rural Area	3,239	3,278	3,611	4,084	4,706	333	806	1,428
2	Clitheroe Area	2,599	2,630	2,897	3,276	3,775	267	646	1,145
3	Whalley Area	2,626	2,657	2,928	3,311	3,815	271	654	1,158
4	A59 Corridor	2,835	2,868	3,160	3,574	4,118	292	706	1,250
5	Longridge Area	2,969	3,004	3,310	3,743	4,313	306	739	1,309

Notes:
(i) Experian local estimates for 2011 comparison goods expenditure per person (including retail business e-tailing but excluding other special forms of trading: 8.9% in 2011; 10.7% in 2013; 14.3% in 2018; 16.0% in 2023 (constant 16.0% assumed over the period from 2023).
(ii) Forecast annual growth rates of: 1.4% ('11-'12); 1.8% ('12-'13); 2.4% ('13-'14); and 2.9% annually thereafter

2011 Prices Inclusive of VAT where applicable

Table 3a: Total Convenience Retail Expenditure and Growth Amongst Study Area Residents

		Spending Power (£m)					Change		
Sub Zone		**2011**	**2013**	**2018**	**2023**	**2028**	**13-'18**	**13-'23**	**13-'28**
1	Forest of Bowland Rural Area	17.8	17.9	18.5	19.6	21.0	0.6	1.7	3.2
2	Clitheroe Area	28.6	28.7	29.7	31.5	33.8	1.0	2.8	5.1
3	Whalley Area	51.0	51.1	53.0	56.1	60.2	1.8	4.9	9.1
4	A59 Corridor	42.5	42.6	44.1	46.7	50.1	1.5	4.1	7.5
5	Longridge Area	41.1	41.2	42.7	45.2	48.5	1.5	4.0	7.3
		181.0	**181.5**	**188.0**	**199.1**	**213.7**	**6.5**	**17.6**	**32.2**

Notes:
(i) Experian local estimates for 2011 convenience goods expenditure per person (including retail business e-tailing but excluding other special forms of trading: 1.8% in 2011; 2.3% in 2013; 3.4% in 2018; 4.2% in 2023; and 4.5% in 2027.
(ii) Forecast annual growth rates of: 0.1% ('11-'12); -0.1% ('12-'13); 0% ('13-'14); 0.6% ('14-'19) and 0.8% ('19-'20 and annually thereafter)

2011 Prices Inclusive of VAT where applicable

Table 3b: Total Comparison Retail Expenditure and Growth Amongst Study Area Residents

Sub Zone		Spending Power (£m) 2011	2013	2018	2023	2028	Change 13-'18	13-'23	13-'28
1	Forest of Bowland Rural Area	25.6	26.1	29.4	34.2	40.8	3.3	8.1	14.7
2	Clitheroe Area	38.4	39.1	44.1	51.3	61.2	5.0	12.1	22.1
3	Whalley Area	70.3	71.6	80.8	93.9	112.0	9.1	22.3	40.4
4	A59 Corridor	61.4	62.6	70.6	82.1	98.0	8.0	19.5	35.3
5	Longridge Area	60.3	61.5	69.3	80.6	96.1	7.8	19.1	34.7
		255.9	**261.0**	**294.2**	**342.0**	**408.1**	**33.2**	**81.1**	**147.1**

Notes:
(i) Experian local estimates for 2011 comparison goods expenditure per person (including retail business e-tailing but excluding other special forms of trading: 8.9% in 2011; 10.7% in 2013; 14.3% in 2018; 16.0% in 2023 (constant 16.0% assumed over the period from 2023).
(ii) Forecast annual growth rates of: 1.4% ('11-'12); 1.8% ('12-'13); 2.4% ('13-'14); and 2.9% annually thereafter

2011 Prices Inclusive of VAT where applicable

Table 4: Main Food Shopping Patterns

Centre/Facilities	Market Share (%)					
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Total
	Forest of Bowland Rural Area	Clitheroe Area	Whalley Area	A59 Corridor	Longridge Area	
Clitheroe Main Shopping Centre						
Booths, Station Road, Clitheroe	28.7	18.1	7.0	10.5	0.0	13.0
Tesco, Duck Street, Clitheroe	29.1	28.7	9.5	4.2	0.7	14.6
Other destinations	0.0	0.8	0.0	0.4	0.0	0.2
Clitheroe Main Shopping Centre Sub-Total	**57.8**	**47.5**	**16.6**	**15.1**	**0.7**	**27.8**
Outside Clitheroe Main Shopping Centre						
Lidl, Shawbridge Street, Clitheroe	7.1	7.1	2.4	1.2	0.0	3.6
Sainsbury's, Moor Lane, Clitheroe	16.3	32.2	15.6	6.8	0.8	14.5
Spar, Edisford Road, Clitheroe	0.0	0.4	0.0	0.0	0.0	0.1
Other destinations	0.4	2.3	0.3	0.0	0.8	0.8
Outside Clitheroe Main Shopping Centre Sub-Total	**23.8**	**42.0**	**18.3**	**8.0**	**1.5**	**19.0**
Clitheroe Total	**81.6**	**89.5**	**34.9**	**23.1**	**2.3**	**46.8**
Longridge Town Centre						
Booths, Berry Lane, Longridge	0.4	0.0	0.7	0.0	21.8	4.7
Co-op, Berry Lane, Longridge	0.0	0.0	0.0	0.0	1.9	0.4
Sainsbury's, Inglewhite Road, Longridge	0.4	0.0	0.7	0.7	32.9	7.0
Other destinations	0.0	0.0	0.0	0.0	1.9	0.4
Longridge Town Centre Sub-Total	**0.9**	**0.0**	**1.4**	**0.7**	**58.4**	**12.5**
Whalley Town Centre						
Spar, George Street, Whalley	0.0	0.0	0.3	0.0	0.0	0.1
Other destinations	0.0	0.0	0.3	0.0	0.0	0.1
Whalley Town Centre Sub-Total	**0.0**	**0.0**	**0.7**	**0.0**	**0.0**	**0.2**
Other destinations Ribble Valley	0.0	0.0	0.0	0.4	0.0	0.1
Ribble Valley Borough Total	**82.5**	**89.5**	**37.0**	**24.3**	**60.6**	**59.5**
Outside of Ribble Valley Borough						
Aldi, Heys Lane, Great Harwood	1.1	0.7	6.3	3.8	0.0	2.5
Asda, Grimshaw Retail Park, Blackburn	0.7	1.1	2.5	10.7	0.0	3.0
Asda, Hyndburn Road, Accrington	1.9	3.0	9.5	1.4	0.0	3.0
Asda, Pittman Way, Fulwood, Preston	0.7	0.0	0.0	0.0	20.6	4.3
Morrisons, Railway Road, Blackburn	0.4	0.0	0.3	13.7	0.4	3.0
Morrisons, Queen Street, Great Harwood	0.0	0.0	11.6	1.3	0.0	2.7
Tesco, Hill Street, Blackburn	0.0	0.4	0.7	17.8	0.0	3.3
Tesco, Queen Street, Great Harwood	1.6	1.9	18.7	6.4	0.0	5.8
Other destinations	11.1	3.3	13.3	20.6	18.4	12.9
Outside of Ribble Valley Borough Sub-Total	**17.5**	**10.5**	**63.0**	**75.7**	**39.4**	**40.5**
Total	**100**	**100**	**100**	**100**	**100**	**100**

Notes:
(i) Source: NEMS Household Telephone Survey (November 2012) - Excludes Don't Know/Don't Do and Other responses
(ii) Weightings afforded to Primary Main Food Destination and Secondary Main Food Destinations are 5/7 Primary Destination and 2/7 Secondary Destination

2011 Prices Inclusive of VAT where applicable

Nathaniel Lichfield & Partners Limited
Ribble Valley Retail Study Update

Table 5: Top-Up Shopping Patterns

Centre/Facilities	Market Share (%)					
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Total
	Forest of Bowland Rural Area	Clitheroe Area	Whalley Area	A59 Corridor	Longridge Area	
Clitheroe Main Shopping Centre						
Booths, Station Road, Clitheroe	21.3	18.0	2.3	6.2	0.0	9.0
Tesco, Duck Street, Clitheroe	18.0	24.7	5.7	1.5	0.0	10.1
Other destinations	8.2	0.0	1.1	0.0	0.0	1.6
Clitheroe Main Shopping Centre Sub-Total	**47.5**	**42.7**	**9.1**	**7.7**	**0.0**	**20.7**
Outside Clitheroe Main Shopping Centre						
Lidl, Shawbridge Street, Clitheroe	4.9	3.4	2.3	0.0	0.0	2.1
Sainsbury's, Moor Lane, Clitheroe	9.8	24.7	3.4	3.1	1.2	8.8
Spar, Edisford Road, Clitheroe	3.3	6.7	1.1	0.0	0.0	2.3
Other destinations	9.8	16.9	2.3	0.0	0.0	5.9
Outside Clitheroe Main Shopping Centre Sub-Total	**27.9**	**51.7**	**9.1**	**3.1**	**1.2**	**19.1**
Clitheroe Total	**75.4**	**94.4**	**18.2**	**10.8**	**1.2**	**39.8**
Longridge Town Centre						
Booths, Berry Lane, Longridge	0.0	0.0	1.1	0.0	22.6	5.2
Co-op, Berry Lane, Longridge	0.0	0.0	0.0	0.0	13.1	2.8
Sainsbury's, Inglewhite Road, Longridge	0.0	0.0	0.0	0.0	22.6	4.9
Other destinations	0.0	0.0	0.0	0.0	17.9	3.9
Longridge Town Centre Sub-Total	**0.0**	**0.0**	**1.1**	**0.0**	**76.2**	**16.8**
Whalley Town Centre						
Spar, George Street, Whalley	0.0	0.0	19.3	1.5	0.0	4.7
Other destinations	0.0	0.0	4.6	0.0	0.0	1.0
Whalley Town Centre Sub-Total	**0.0**	**0.0**	**23.9**	**1.5**	**0.0**	**5.7**
Other destinations Ribble Valley	19.7	1.1	1.1	21.5	3.6	8.0
Ribble Valley Borough Total	**95.1**	**95.5**	**44.3**	**33.9**	**81.0**	**70.3**
Outside of Ribble Valley Borough						
Aldi, Heys Lane, Great Harwood	0.0	0.0	2.3	0.0	0.0	0.5
Asda, Grimshaw Retail Park, Blackburn	0.0	0.0	0.0	1.5	0.0	0.3
Asda, Hyndburn Road, Accrington	0.0	0.0	2.3	1.5	0.0	0.8
Asda, Pittman Way, Fulwood, Preston	0.0	0.0	0.0	0.0	2.4	0.5
Morrisons, Railway Road, Blackburn	0.0	0.0	0.0	12.3	0.0	2.1
Morrisons, Queen Street, Great Harwood	0.0	0.0	18.2	1.5	0.0	4.4
Tesco, Hill Street, Blackburn	0.0	1.1	0.0	4.6	0.0	1.0
Tesco, Queen Street, Great Harwood	0.0	0.0	9.1	1.5	0.0	2.3
Other destinations	4.9	3.4	23.9	43.1	16.7	17.8
Outside of Ribble Valley Borough Sub-Total	**4.9**	**4.5**	**55.7**	**66.2**	**19.1**	**29.7**
Total	**100**	**100**	**100**	**100**	**100**	**100**

Notes:
(i) Source: NEMS Household Telephone Survey (November 2012) - Excludes Don't Know/Don't Do and Other responses

2011 Prices Inclusive of VAT where applicable

Table 6: Convenience Shopping Patterns (Main Food and Top-Up Combined)

Centre/Facilities	Market Share (%)					
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Total
	Forest of Bowland Rural Area	Clitheroe Area	Whalley Area	A59 Corridor	Longridge Area	
Clitheroe Main Shopping Centre						
Booths, Station Road, Clitheroe	26.5	18.1	5.6	9.2	0.0	11.8
Tesco, Duck Street, Clitheroe	25.8	27.5	8.4	3.4	0.5	13.2
Other destinations	2.5	0.6	0.3	0.3	0.0	0.6
Clitheroe Main Shopping Centre Sub-Total	**54.7**	**46.1**	**14.3**	**12.9**	**0.5**	**25.6**
Outside Clitheroe Main Shopping Centre						
Lidl, Shawbridge Street, Clitheroe	6.5	6.0	2.4	0.8	0.0	3.2
Sainsbury's, Moor Lane, Clitheroe	14.3	30.0	11.9	5.7	0.9	12.8
Spar, Edisford Road, Clitheroe	1.0	2.3	0.3	0.0	0.0	0.8
Other destinations	3.3	6.7	0.9	0.0	0.5	2.3
Outside Clitheroe Main Shopping Centre Sub-Total	**25.0**	**44.9**	**15.6**	**6.5**	**1.4**	**19.1**
Clitheroe Total	**79.8**	**91.0**	**29.9**	**19.4**	**1.9**	**44.7**
Longridge Town Centre						
Booths, Berry Lane, Longridge	0.3	0.0	0.8	0.0	22.0	4.8
Co-op, Berry Lane, Longridge	0.0	0.0	0.0	0.0	5.2	1.1
Sainsbury's, Inglewhite Road, Longridge	0.3	0.0	0.5	0.5	29.8	6.4
Other destinations	0.0	0.0	0.0	0.0	6.7	1.4
Longridge Town Centre Sub-Total	**0.6**	**0.0**	**1.3**	**0.5**	**63.7**	**13.7**
Whalley Town Centre						
Spar, George Street, Whalley	0.0	0.0	6.0	0.5	0.0	1.5
Other destinations	0.0	0.0	1.6	0.0	0.0	0.4
Whalley Town Centre Sub-Total	**0.0**	**0.0**	**7.6**	**0.5**	**0.0**	**1.8**
Other destinations Ribble Valley	5.9	0.3	0.3	6.8	1.1	2.5
Ribble Valley Borough Total	**86.3**	**91.3**	**39.2**	**27.1**	**66.7**	**62.7**
Outside of Ribble Valley Borough						
Aldi, Heys Lane, Great Harwood	0.8	0.5	5.1	2.6	0.0	1.9
Asda, Grimshaw Retail Park, Blackburn	0.5	0.8	1.7	8.0	0.0	2.2
Asda, Hyndburn Road, Accrington	1.3	2.1	7.4	1.5	0.0	2.3
Asda, Pittman Way, Fulwood, Preston	0.5	0.0	0.0	0.0	15.1	3.2
Morrisons, Railway Road, Blackburn	0.3	0.0	0.2	13.3	0.3	2.7
Morrisons, Queen Street, Great Harwood	0.0	0.0	13.6	1.4	0.0	3.2
Tesco, Hill Street, Blackburn	0.0	0.6	0.5	13.8	0.0	2.7
Tesco, Queen Street, Great Harwood	1.1	1.3	15.9	4.9	0.0	4.7
Other destinations	9.3	3.3	16.5	27.3	17.9	14.4
Outside of Ribble Valley Borough Sub-Total	**13.8**	**8.7**	**60.8**	**72.9**	**33.3**	**37.3**
Total	**100**	**100**	**100**	**100**	**100**	**100**

Notes:
(i) Source: NEMS Household Telephone Survey (May 2013) - excludes 'don't know/'don't do' and 'other' responses
(ii) Weighting afforded to Main Food (Primary)/Main Food (Secondary) and Top up Shopping Destinations is 70%/20%/30%

2011 Prices Inclusive of VAT where applicable

Nathaniel Lichfield & Partners Limited
Ribble Valley Retail Study Update

Table 7: Convenience Retail Turnover 2013

Centre/Facilities	Zone 1 Forest of Bowland Rural Area	Zone 2 Clitheroe Area	Zone 3 Whalley Area	Zone 4 A59 Corridor	Zone 5 Longridge Area	Study Area Total
	£ Million					
	17.9	**28.7**	**51.1**	**42.6**	**41.2**	**181.5**
Clitheroe Main Shopping Centre						
Booths, Station Road, Clitheroe	4.7	5.2	2.9	3.9	0.0	16.7
Tesco, Duck Street, Clitheroe	4.6	7.9	4.3	1.4	0.2	18.4
Other destinations	0.4	0.2	0.2	0.1	0.0	0.9
Clitheroe Main Shopping Centre Sub-Total	**9.8**	**13.2**	**7.3**	**5.5**	**0.2**	**36.0**
Outside Clitheroe Main Shopping Centre						
Lidl, Shawbridge Street, Clitheroe	1.2	1.7	1.2	0.3	0.0	4.4
Sainsbury's, Moor Lane, Clitheroe	2.6	8.6	6.1	2.4	0.4	20.1
Spar, Edisford Road, Clitheroe	0.2	0.7	0.2	0.0	0.0	1.0
Local shops, Clitheroe	0.6	1.9	0.5	0.0	0.2	3.2
Outside Clitheroe Main Shopping Centre Sub-Total	**4.5**	**12.9**	**8.0**	**2.8**	**0.6**	**28.7**
Clitheroe Total	**14.2**	**26.1**	**15.3**	**8.3**	**0.8**	**64.7**
Longridge Town Centre						
Booths, Berry Lane, Longridge	0.1	0.0	0.4	0.0	9.1	9.6
Co-op, Berry Lane, Longridge	0.0	0.0	0.0	0.0	2.2	2.2
Sainsbury's, Inglewhite Road, Longridge	0.1	0.0	0.3	0.2	12.3	12.8
Other destinations	0.0	0.0	0.0	0.0	2.8	2.8
Longridge Town Centre Sub-Total	**0.1**	**0.0**	**0.7**	**0.2**	**26.3**	**27.3**
Whalley Town Centre						
Spar, George Street, Whalley	0.0	0.0	3.1	0.2	0.0	3.3
Other destinations	0.0	0.0	0.8	0.0	0.0	0.8
Whalley Town Centre Sub-Total	**0.0**	**0.0**	**3.9**	**0.2**	**0.0**	**4.1**
Other destinations Ribble Valley	1.1	0.1	0.2	2.9	0.4	4.7
Ribble Valley Borough Total	**15.4**	**26.2**	**20.0**	**11.6**	**27.5**	**100.7**
Outside of Ribble Valley Borough						
Aldi, Heys Lane, Great Harwood	0.1	0.1	2.6	1.1	0.0	4.0
Asda, Grimshaw Retail Park, Blackburn	0.1	0.2	0.9	3.4	0.0	4.6
Asda, Hyndburn Road, Accrington	0.2	0.6	3.8	0.6	0.0	5.2
Asda, Pittman Way, Fulwood, Preston	0.1	0.0	0.0	0.0	6.2	6.3
Morrisons, Railway Road, Blackburn	0.1	0.0	0.1	5.7	0.1	6.0
Morrisons, Queen Street, Great Harwood	0.0	0.0	6.9	0.6	0.0	7.5
Tesco, Hill Street, Blackburn	0.0	0.2	0.3	5.9	0.0	6.3
Tesco, Queen Street, Great Harwood	0.2	0.4	8.1	2.1	0.0	10.8
Other destinations	1.7	1.0	8.4	11.6	7.4	30.1
Outside of Ribble Valley Borough Sub-Total	**2.5**	**2.5**	**31.1**	**31.0**	**13.7**	**80.8**
Total	**17.9**	**28.7**	**51.1**	**42.6**	**41.2**	**181.5**

Notes:
(i) Source: Tables 3a, 6
(ii) Rounding errors may occur

2011 Prices Inclusive of VAT where applicable

Nathaniel Lichfield & Partners Limited
Ribble Valley Retail Study Update

Table 8: Convenience Retail Turnover 2018

Centre/Facilities	£ Million					
	Zone 1 Forest of Bowland Rural Area	Zone 2 Clitheroe Area	Zone 3 Whalley Area	Zone 4 A59 Corridor	Zone 5 Longridge Area	Study Area Total
	18.5	**29.7**	**53.0**	**44.1**	**42.7**	**188.0**
Clitheroe Main Shopping Centre						
Booths, Station Road, Clitheroe	4.9	5.4	3.0	4.0	0.0	17.3
Tesco, Duck Street, Clitheroe	4.8	8.2	4.4	1.5	0.2	19.1
Other destinations	0.5	0.2	0.2	0.1	0.0	0.9
Clitheroe Main Shopping Centre Sub-Total	**10.1**	**13.7**	**7.6**	**5.7**	**0.2**	**37.3**
Outside Clitheroe Main Shopping Centre						
Lidl, Shawbridge Street, Clitheroe	1.2	1.8	1.3	0.4	0.0	4.6
Sainsbury's, Moor Lane, Clitheroe	2.7	8.9	6.3	2.5	0.4	20.8
Spar, Edisford Road, Clitheroe	0.2	0.7	0.2	0.0	0.0	1.0
Local shops, Clitheroe	0.6	2.0	0.5	0.0	0.2	3.3
Outside Clitheroe Main Shopping Centre Sub-Total	**4.6**	**13.4**	**8.2**	**2.9**	**0.6**	**29.7**
Clitheroe Total	**14.8**	**27.1**	**15.8**	**8.6**	**0.8**	**67.0**
Longridge Town Centre						
Booths, Berry Lane, Longridge	0.1	0.0	0.4	0.0	9.4	9.9
Co-op, Berry Lane, Longridge	0.0	0.0	0.0	0.0	2.2	2.2
Sainsbury's, Inglewhite Road, Longridge	0.1	0.0	0.3	0.2	12.7	13.3
Other destinations	0.0	0.0	0.0	0.0	2.8	2.8
Longridge Town Centre Sub-Total	**0.1**	**0.0**	**0.7**	**0.2**	**27.2**	**28.3**
Whalley Town Centre						
Spar, George Street, Whalley	0.0	0.0	3.2	0.2	0.0	3.4
Other destinations	0.0	0.0	0.8	0.0	0.0	0.8
Whalley Town Centre Sub-Total	**0.0**	**0.0**	**4.0**	**0.2**	**0.0**	**4.2**
Other destinations Ribble Valley	1.1	0.1	0.2	3.0	0.5	4.8
Ribble Valley Borough Total	**16.0**	**27.2**	**20.8**	**12.0**	**28.5**	**104.3**
Outside of Ribble Valley Borough						
Aldi, Heys Lane, Great Harwood	0.1	0.1	2.7	1.2	0.0	4.2
Asda, Grimshaw Retail Park, Blackburn	0.1	0.2	0.9	3.5	0.0	4.8
Asda, Hyndburn Road, Accrington	0.2	0.6	3.9	0.6	0.0	5.4
Asda, Pittman Way, Fulwood, Preston	0.1	0.0	0.0	0.0	6.5	6.6
Morrisons, Railway Road, Blackburn	0.1	0.0	0.1	5.9	0.1	6.2
Morrisons, Queen Street, Great Harwood	0.0	0.0	7.2	0.6	0.0	7.8
Tesco, Hill Street, Blackburn	0.0	0.2	0.3	6.1	0.0	6.6
Tesco, Queen Street, Great Harwood	0.2	0.4	8.4	2.2	0.0	11.2
Other destinations	1.7	1.0	8.7	12.1	7.6	31.1
Outside of Ribble Valley Borough Sub-Total	**2.5**	**2.6**	**32.2**	**32.2**	**14.2**	**83.7**
Total	**18.5**	**29.7**	**53.0**	**44.1**	**42.7**	**188.0**

Notes:
(i) Source: Tables 3a, 6
(ii) Rounding errors may occur

2011 Prices Inclusive of VAT where applicable

Table 9: Convenience Retail Turnover 2023

Centre/Facilities	£ Million					
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Study Area
	Forest of Bowland Rural Area	Clitheroe Area	Whalley Area	A59 Corridor	Longridge Area	Total
	19.6	**31.5**	**56.1**	**46.7**	**45.2**	**199.1**
Clitheroe Main Shopping Centre						
Booths, Station Road, Clitheroe	5.2	5.7	3.1	4.3	0.0	18.3
Tesco, Duck Street, Clitheroe	5.1	8.6	4.7	1.6	0.2	20.2
Other destinations	0.5	0.2	0.2	0.1	0.0	1.0
Clitheroe Main Shopping Centre Sub-Total	**10.7**	**14.5**	**8.0**	**6.0**	**0.2**	**39.5**
Outside Clitheroe Main Shopping Centre						
Lidl, Shawbridge Street, Clitheroe	1.3	1.9	1.3	0.4	0.0	4.9
Sainsbury's, Moor Lane, Clitheroe	2.8	9.4	6.7	2.7	0.4	22.0
Spar, Edisford Road, Clitheroe	0.2	0.7	0.2	0.0	0.0	1.1
Local shops, Clitheroe	0.6	2.1	0.5	0.0	0.2	3.5
Outside Clitheroe Main Shopping Centre Sub-Total	**4.9**	**14.1**	**8.7**	**3.0**	**0.6**	**31.5**
Clitheroe Total	**15.6**	**28.6**	**16.8**	**9.1**	**0.9**	**71.0**
Longridge Town Centre						
Booths, Berry Lane, Longridge	0.1	0.0	0.5	0.0	10.0	10.5
Co-op, Berry Lane, Longridge	0.0	0.0	0.0	0.0	2.4	2.4
Sainsbury's, Inglewhite Road, Longridge	0.1	0.0	0.3	0.2	13.5	14.1
Other destinations	0.0	0.0	0.0	0.0	3.0	3.0
Longridge Town Centre Sub-Total	**0.1**	**0.0**	**0.8**	**0.2**	**28.8**	**29.9**
Whalley Town Centre						
Spar, George Street, Whalley	0.0	0.0	3.4	0.2	0.0	3.6
Other destinations	0.0	0.0	0.9	0.0	0.0	0.9
Whalley Town Centre Sub-Total	**0.0**	**0.0**	**4.3**	**0.2**	**0.0**	**4.5**
Other destinations Ribble Valley	1.2	0.1	0.2	3.2	0.5	5.1
Ribble Valley Borough Total	**16.9**	**28.8**	**22.0**	**12.7**	**30.2**	**110.5**
Outside of Ribble Valley Borough						
Aldi, Heys Lane, Great Harwood	0.2	0.2	2.9	1.2	0.0	4.4
Asda, Grimshaw Retail Park, Blackburn	0.1	0.2	1.0	3.7	0.0	5.0
Asda, Hyndburn Road, Accrington	0.3	0.7	4.1	0.7	0.0	5.7
Asda, Pittman Way, Fulwood, Preston	0.1	0.0	0.0	0.0	6.8	6.9
Morrisons, Railway Road, Blackburn	0.1	0.0	0.1	6.2	0.1	6.5
Morrisons, Queen Street, Great Harwood	0.0	0.0	7.6	0.6	0.0	8.2
Tesco, Hill Street, Blackburn	0.0	0.2	0.3	6.5	0.0	6.9
Tesco, Queen Street, Great Harwood	0.2	0.4	8.9	2.3	0.0	11.8
Other destinations	1.8	1.1	9.2	12.8	8.1	33.0
Outside of Ribble Valley Borough Sub-Total	**2.7**	**2.7**	**34.1**	**34.1**	**15.1**	**88.6**
Total	**19.6**	**31.5**	**56.1**	**46.7**	**45.2**	**199.1**

Notes:
(i) Source: Tables 3a, 6
(ii) Rounding errors may occur

2011 Prices Inclusive of VAT where applicable

Nathaniel Lichfield & Partners Limited
Ribble Valley Retail Study Update

Table 10: Convenience Retail Turnover 2028

Centre/Facilities	£ Million					
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Study Area
	Forest of Bowland Rural Area	Clitheroe Area	Whalley Area	A59 Corridor	Longridge Area	Total
	21.0	**33.8**	**60.2**	**50.1**	**48.5**	**213.7**
Clitheroe Main Shopping Centre						
Booths, Station Road, Clitheroe	5.6	6.1	3.4	4.6	0.0	19.6
Tesco, Duck Street, Clitheroe	5.4	9.3	5.0	1.7	0.2	21.7
Other destinations	0.5	0.2	0.2	0.2	0.0	1.1
Clitheroe Main Shopping Centre Sub-Total	**11.5**	**15.6**	**8.6**	**6.5**	**0.2**	**42.4**
Outside Clitheroe Main Shopping Centre						
Lidl, Shawbridge Street, Clitheroe	1.4	2.0	1.4	0.4	0.0	5.2
Sainsbury's, Moor Lane, Clitheroe	3.0	10.1	7.2	2.9	0.4	23.6
Spar, Edisford Road, Clitheroe	0.2	0.8	0.2	0.0	0.0	1.2
Local shops, Clitheroe	0.7	2.3	0.6	0.0	0.3	3.7
Outside Clitheroe Main Shopping Centre Sub-Total	**5.3**	**15.2**	**9.4**	**3.3**	**0.7**	**33.8**
Clitheroe Total	**16.8**	**30.7**	**18.0**	**9.7**	**0.9**	**76.1**
Longridge Town Centre						
Booths, Berry Lane, Longridge	0.1	0.0	0.5	0.0	10.7	11.3
Co-op, Berry Lane, Longridge	0.0	0.0	0.0	0.0	2.5	2.5
Sainsbury's, Inglewhite Road, Longridge	0.1	0.0	0.3	0.3	14.5	15.1
Other destinations	0.0	0.0	0.0	0.0	3.2	3.2
Longridge Town Centre Sub-Total	**0.1**	**0.0**	**0.8**	**0.3**	**30.9**	**32.1**
Whalley Town Centre						
Spar, George Street, Whalley	0.0	0.0	3.6	0.2	0.0	3.9
Other destinations	0.0	0.0	1.0	0.0	0.0	1.0
Whalley Town Centre Sub-Total	**0.0**	**0.0**	**4.6**	**0.2**	**0.0**	**4.8**
Other destinations Ribble Valley	1.2	0.1	0.2	3.4	0.5	**5.5**
Ribble Valley Borough Total	**18.1**	**30.9**	**23.6**	**13.6**	**32.4**	**118.6**
Outside of Ribble Valley Borough						
Aldi, Heys Lane, Great Harwood	0.2	0.2	3.1	1.3	0.0	4.7
Asda, Grimshaw Retail Park, Blackburn	0.1	0.3	1.0	4.0	0.0	5.4
Asda, Hyndburn Road, Accrington	0.3	0.7	4.4	0.7	0.0	6.1
Asda, Pittman Way, Fulwood, Preston	0.1	0.0	0.0	0.0	7.3	7.4
Morrisons, Railway Road, Blackburn	0.1	0.0	0.1	6.7	0.1	7.0
Morrisons, Queen Street, Great Harwood	0.0	0.0	8.2	0.7	0.0	8.8
Tesco, Hill Street, Blackburn	0.0	0.2	0.3	6.9	0.0	7.4
Tesco, Queen Street, Great Harwood	0.2	0.4	9.5	2.5	0.0	12.7
Other destinations	1.9	1.1	9.9	13.7	8.7	35.4
Outside of Ribble Valley Borough Sub-Total	**2.9**	**2.9**	**36.6**	**36.5**	**16.2**	**95.1**
Total	**21.0**	**33.8**	**60.2**	**50.1**	**48.5**	**213.7**

Notes:
(i) Source: Tables 3a, 6
(ii) Rounding errors may occur

2011 Prices Inclusive of VAT where applicable

Table 11: Summary of Convenience Retail Performance 2013 to 2028

Centre	2013	2018	2023	2028
Available Expenditure				
Clitheroe	64.7	67.0	71.0	76.1
Longridge	27.3	28.3	29.9	32.1
Whalley	4.1	4.2	4.5	4.8
Other destinations Ribble Valley	4.7	4.8	5.1	5.5
Ribble Valley Borough Sub-Total	**100.7**	**104.3**	**110.5**	**118.6**
Benchmark Turnover				
Clitheroe	56.2	56.2	56.2	56.2
Longridge	31.0	31.0	31.0	31.0
Whalley	2.8	2.8	2.8	2.8
Other destinations Ribble Valley	4.7	4.7	4.7	4.7
Ribble Valley Borough Sub-Total	**94.7**	**94.7**	**94.7**	**94.7**
Expenditure Deficit/Surplus				
Clitheroe	8.5	10.8	14.8	19.9
Longridge	-3.8	-2.8	-1.1	1.1
Whalley	1.3	1.4	1.7	2.0
Other destinations Ribble Valley	0.0	0.2	0.5	0.8

Notes:
(i) Source: Tables 7, 8, 9 and 10
(ii) Benchmark turnover based upon company average sales density of national multiple retailers and independent floorspace trading at typical average sales densities
(iii) No growth in floorspace efficiency over the period to 2028

2011 Prices Inclusive of VAT where applicable

Table 12: Convenience Retail Capacity (sq.m) at 2013, 2018, 2023 and 2028

Centre	At 2013			By 2018			By 2023			By 2028		
	Expected Surplus/ Deficit	Turnover Density sq.m	Net Sales Floorspace sq.m	Expected Surplus/ Deficit	Turnover Density sq.m	Net Sales Floorspace sq.m	Expected Surplus/ Deficit	Turnover Density sq.m	Net Sales Floorspace sq.m	Expected Surplus/ Deficit	Turnover Density sq.m	Net Sales Floorspace sq.m
Clitheroe	8.5	11,000	770	10.8	11,000	983	14.8	11,000	1,341	19.9	11,000	1,812
Longridge	-3.8	8,000	-	-2.8	8,000	-	-1.1	8,000	-	1.1	8,000	136
Whalley	1.3	8,000	158	1.4	8,000	177	1.7	8,000	208	2.0	8,000	249
Other destinations Ribble Valley	0.0	7,000	-	0.2	7,000	24	0.5	7,000	65	0.8	7,000	118

Notes:
(i) Source Table 11
(ii) Capacity is assessed using a foodstore convenience retail sales density of £11,000 per sq. m for Clitheroe. Lower sales densities adopted for other destinations given the likelihood of secondary town centres and other destinations attracting smaller stores/retailers with lower average sales densities

2011 Prices Inclusive of VAT where applicable

Table 13: Comparison Shopping Patterns

Centre/Facilities	Market Share (%)					
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Total
	Forest of Bowland Rural Area	Clitheroe Area	Whalley Area	A59 Corridor	Longridge Area	
Clitheroe Town Centre	54.9	55.4	22.8	12.7	1.6	29.4
Longridge Town Centre	0.1	0.0	0.2	0.3	16.4	3.5
Whalley Town Centre	0.8	0.3	1.7	3.4	0.3	1.3
Other destinations	1.1	0.0	0.0	1.3	0.0	0.5
Ribble Valley Borough Sub-Total	**56.9**	**55.7**	**24.6**	**17.8**	**18.3**	**34.7**
Destinations outside Ribble Valley Borough						
Accrington	2.8	1.5	8.5	1.0	0.0	2.8
Blackburn	9.9	19.5	30.9	50.0	3.3	22.2
Burnley	3.4	3.6	5.5	0.3	0.3	2.7
Colne	2.4	0.3	1.0	1.5	0.3	1.1
Deepdale Retail Park	0.5	0.9	0.3	0.5	9.5	2.4
Manchester	3.4	5.4	3.0	3.5	2.1	3.5
Preston	5.5	4.8	5.8	15.1	53.1	17.2
Other destinations	15.4	8.3	20.3	10.5	13.1	13.6
Destinations outside Ribble Valley Sub-Total	**43.1**	**44.3**	**75.3**	**82.2**	**81.7**	**65.3**
Total	**100**	**100**	**100**	**100**	**100**	**100**

Notes:
(i) Source: NEMS Household Telephone Survey (May 2013) - excludes 'don't know/'don't do' and 'other' responses
(ii) Weighting afforded to non-food shopping is: clothing and footwear (25%); electrical items (16%); furniture/soft furnishings/carpets (12%); DIY/garden/hardware items (11%); health, beauty and chemist items (11%); and books, CDs, toys and gifts (25%).

2011 Prices Inclusive of VAT where applicable

Table 14: Comparison Retail Turnover 2013

Centre/Facilities	£ Million					
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Study Area
	Forest of Bowland Rural Area	Clitheroe Area	Whalley Area	A59 Corridor	Longridge Area	Total
Expenditure 2013	**26.1**	**39.1**	**71.6**	**62.6**	**61.5**	**261.0**
Clitheroe Town Centre	14.3	21.7	16.3	8.0	1.0	61.2
Longridge Town Centre	0.0	0.0	0.1	0.2	10.1	10.4
Whalley Town Centre	0.2	0.1	1.2	2.1	0.2	3.9
Other destinations	0.3	0.0	0.0	0.8	0.0	1.1
Ribble Valley Borough Sub-Total	**14.8**	**21.8**	**17.7**	**11.1**	**11.2**	**76.6**
Destinations outside Ribble Valley Borough						
Accrington	0.7	0.6	6.1	0.6	0.0	8.0
Blackburn	2.6	7.6	22.1	31.3	2.0	65.7
Burnley	0.9	1.4	4.0	0.2	0.2	6.6
Colne	0.6	0.1	0.7	0.9	0.2	2.6
Deepdale Retail Park	0.1	0.4	0.2	0.3	5.9	6.9
Manchester	0.9	2.1	2.1	2.2	1.3	8.6
Preston	1.4	1.9	4.2	9.5	32.6	49.6
Other destinations	4.0	3.2	14.5	6.6	8.0	36.4
Destinations outside Ribble Valley Sub-Total	**11.2**	**17.4**	**54.0**	**51.5**	**50.2**	**184.3**
Total	**26.1**	**39.1**	**71.6**	**62.6**	**61.5**	**260.9**

Notes:
(i) Source: Tables 3b, 13
(ii) Rounding errors may occur

2011 Prices Inclusive of VAT where applicable

Table 15: Comparison Retail Turnover 2018

Centre/Facilities	£ Million					
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Study Area
	Forest of Bowland Rural Area	Clitheroe Area	Whalley Area	A59 Corridor	Longridge Area	Total
Expenditure 2013	**29.4**	**44.1**	**80.8**	**70.6**	**69.3**	**294.2**
Clitheroe Town Centre	16.1	24.4	18.4	9.0	1.1	69.0
Longridge Town Centre	0.0	0.0	0.1	0.2	11.4	11.8
Whalley Town Centre	0.2	0.1	1.4	2.4	0.2	4.3
Other destinations	0.3	0.0	0.0	0.9	0.0	1.3
Ribble Valley Borough Sub-Total	**16.7**	**24.6**	**19.9**	**12.5**	**12.7**	**86.4**
Destinations outside Ribble Valley Borough						
Accrington	0.8	0.7	6.9	0.7	0.0	9.1
Blackburn	2.9	8.6	25.0	35.3	2.3	74.0
Burnley	1.0	1.6	4.5	0.2	0.2	7.4
Colne	0.7	0.1	0.8	1.0	0.2	2.9
Deepdale Retail Park	0.1	0.4	0.2	0.4	6.6	7.7
Manchester	1.0	2.4	2.4	2.4	1.5	9.7
Preston	1.6	2.1	4.7	10.7	36.8	55.9
Other destinations	4.5	3.7	16.4	7.4	9.1	41.0
Destinations outside Ribble Valley Sub-Total	**12.7**	**19.6**	**60.9**	**58.1**	**56.6**	**207.8**
Total	**29.4**	**44.1**	**80.8**	**70.6**	**69.3**	**294.2**

Notes:
(i) Source: Tables 3b, 13
(ii) Rounding errors may occur

2011 Prices Inclusive of VAT where applicable

Table 16: Comparison Retail Turnover 2023

Centre/Facilities	£ Million					
	Zone 1 Forest of Bowland Rural Area	Zone 2 Clitheroe Area	Zone 3 Whalley Area	Zone 4 A59 Corridor	Zone 5 Longridge Area	Study Area Total
Expenditure 2013	**34.2**	**51.3**	**93.9**	**82.1**	**80.6**	**342.0**
Clitheroe Town Centre	18.7	28.4	21.4	10.5	1.3	80.2
Longridge Town Centre	0.0	0.0	0.2	0.2	13.2	13.7
Whalley Town Centre	0.3	0.2	1.6	2.8	0.2	5.0
Other destinations	0.4	0.0	0.0	1.1	0.0	1.5
Ribble Valley Borough Sub-Total	**19.4**	**28.5**	**23.1**	**14.6**	**14.7**	**100.4**
Destinations outside Ribble Valley Borough						
Accrington	1.0	0.8	8.0	0.8	0.0	10.5
Blackburn	3.4	10.0	29.0	41.0	2.7	86.1
Burnley	1.2	1.8	5.2	0.2	0.2	8.6
Colne	0.8	0.2	1.0	1.2	0.2	3.3
Deepdale Retail Park	0.2	0.5	0.3	0.4	7.7	9.0
Manchester	1.2	2.8	2.8	2.8	1.7	11.3
Preston	1.9	2.5	5.5	12.4	42.8	65.0
Other destinations	5.2	4.3	19.0	8.6	10.5	47.7
Destinations outside Ribble Valley Sub-Total	**14.7**	**22.7**	**70.7**	**67.5**	**65.8**	**241.6**
Total	**34.2**	**51.3**	**93.9**	**82.1**	**80.6**	**342.0**

Notes:
(i) Source: Tables 3b, 13
(ii) Rounding errors may occur

2011 Prices Inclusive of VAT where applicable

Table 17: Comparison Retail Turnover 2028

Centre/Facilities	£ Million					
	Zone 1 Forest of Bowland Rural Area	Zone 2 Clitheroe Area	Zone 3 Whalley Area	Zone 4 A59 Corridor	Zone 5 Longridge Area	Study Area Total
Expenditure 2013	**40.8**	**61.2**	**112.0**	**98.0**	**96.1**	**408.1**
Clitheroe Town Centre	22.4	33.9	25.5	12.5	1.5	95.8
Longridge Town Centre	0.0	0.0	0.2	0.3	15.8	16.3
Whalley Town Centre	0.3	0.2	1.9	3.3	0.3	6.0
Other destinations	0.5	0.0	0.0	1.3	0.0	1.8
Ribble Valley Borough Sub-Total	**23.2**	**34.1**	**27.6**	**17.4**	**17.6**	**119.9**
Destinations outside Ribble Valley Borough						
Accrington	1.1	0.9	9.6	1.0	0.0	12.6
Blackburn	4.0	11.9	34.6	48.9	3.2	102.7
Burnley	1.4	2.2	6.2	0.2	0.3	10.3
Colne	1.0	0.2	1.1	1.4	0.3	4.0
Deepdale Retail Park	0.2	0.6	0.3	0.5	9.2	10.7
Manchester	1.4	3.3	3.3	3.4	2.1	13.5
Preston	2.2	2.9	6.5	14.8	51.0	77.5
Other destinations	6.3	5.1	22.7	10.3	12.6	56.9
Destinations outside Ribble Valley Sub-Total	**17.6**	**27.1**	**84.4**	**80.5**	**78.6**	**288.2**
Total	**40.8**	**61.2**	**112.0**	**97.9**	**96.2**	**408.1**

Notes:
(i) Source: Tables 3b, 13
(ii) Rounding errors may occur

2011 Prices Inclusive of VAT where applicable

Table 18: Summary of Comparison Retail Performance 2013 to 2028

Centre	2013	2018	2023	2028
Available Expenditure				
Clitheroe	61.2	69.0	80.2	95.8
Longridge	10.4	11.8	13.7	16.3
Whalley	3.9	4.3	5.0	6.0
Other destinations Ribble Valley	1.1	1.3	1.5	1.8
Ribble Valley Borough Sub-Total	**76.6**	**86.4**	**100.4**	**119.9**
Benchmark Turnover (including floorspace efficiencies)				
Clitheroe	61.2	66.6	72.5	78.9
Longridge	10.4	11.4	12.4	13.4
Whalley	3.9	4.2	4.6	5.0
Other destinations Ribble Valley	1.1	1.2	1.3	1.4
Ribble Valley Borough Sub-Total	**76.6**	**83.4**	**90.7**	**98.7**
Expenditure Deficit/Surplus				
Clitheroe	-	2.4	7.8	16.9
Longridge	-	0.4	1.3	2.9
Whalley	-	0.0	0.5	1.1
Other destinations Ribble Valley	-	0.0	0.1	0.3

Notes:
(i) Source: Tables 14, 15, 16 and 17
(ii) Floorspace at 2013 assumed to be trading at household survey derived turnover
(iii) Growth in floorspace efficiency is 1.7% annually

2011 Prices Inclusive of VAT where applicable

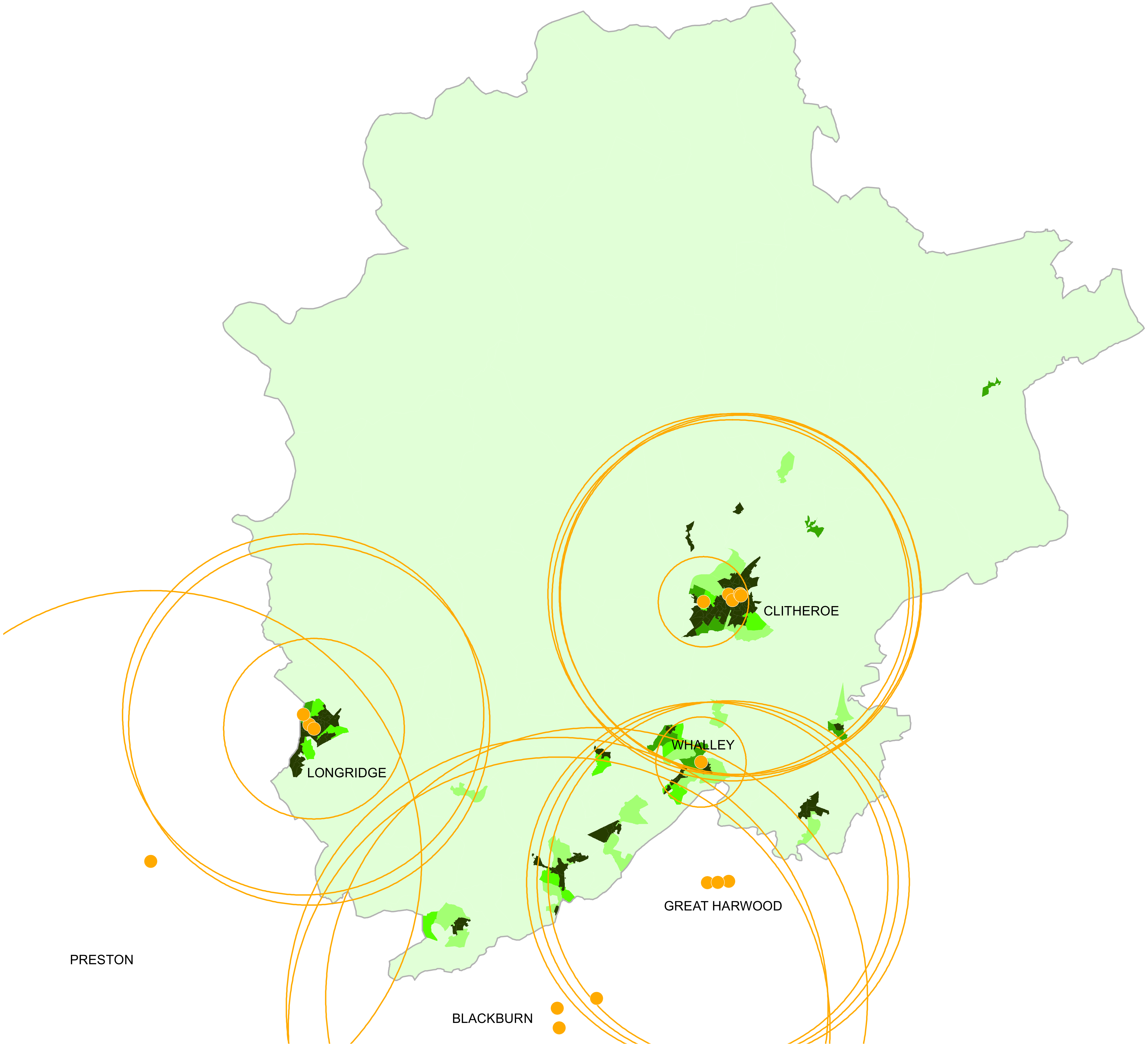
Table 19: Comparison Retail Capacity (sq.m net) at 2013, 2018, 2023 and 2028

Centre	At 2013			By 2018			By 2023			By 2028		
	Expected Surplus/ Deficit	Turnover Density sq.m	Net Sales Floorspace sq.m	Expected Surplus/ Deficit	Turnover Density sq.m	Net Sales Floorspace sq.m	Expected Surplus/ Deficit	Turnover Density sq.m	Net Sales Floorspace sq.m	Expected Surplus/ Deficit	Turnover Density sq.m	Net Sales Floorspace sq.m
Clitheroe	-	5,000	-	2.4	5,440	443	7.8	5,918	1,313	16.9	6,438	2,626
Longridge	-	3,500	-	0.4	3,808	108	1.3	4,143	320	2.9	4,507	640
Whalley	-	3,500	-	0.0	3,808	12	0.5	4,143	118	1.1	4,507	236
Other destinations Ribble Valley	-	1,500	-	0.0	1,632	27	0.1	1,775	80	0.3	1,932	160

Notes:
(i) Source: Tables 14, 15, 16 and 17
(ii) Capacity assessed assuming sales density of £5,000 per sq. m for Clitheroe and £3,500 per sq. m for Longridge and Whalley (typical to primary and secondary town centres)
(iii) Floorspace at 2013 assumed to be trading at equilibrium

2011 Prices Inclusive of VAT where applicable

Appendix 5 Food Deserts Plan



Key

Population Density by Census Output Area (ONS Census, 2011) - Number of Persons per Hectare

- >20.0
- 15.1 - 20.0
- 10.1 - 15.0
- 5.1 - 10.0
- <5.0

Existing Foodstore

Existing Foodstore Catchment (km's)

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Project	Ribble Valley Retail Study Update 2013
Title	Ribble Valley Food Deserts
Client	Ribble Valley Borough Council
Date	04.06.2013
Scale	-
Drawn by	MAR
Drg. No	GIS41239/01-03

N

GIS Reference: S:\MA41239 - Ribble Valley Retail Study Update 2013\MA41239 - Ribble Valley Retail Study Update 2013 - Food Desert - 04.06.2013.mxd

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