Deloitte.

Real Estate

Chorley Town Centre Masterplan

Baseline Report

June 2013

Acknowledgements

This baseline report was produced with input from:

Chorley Council

planit
intelligent environments

curtins consulting

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1.0 Introduction

The objectives of this analysis and masterplanning work are to:

Create a Town Centre Masterplan which will provide a long term plan for the future development of Chorley Town Centre, providing a deliverable framework for investment at key development sites to ensure the viability and vitality of Chorley Town Centre going forward.

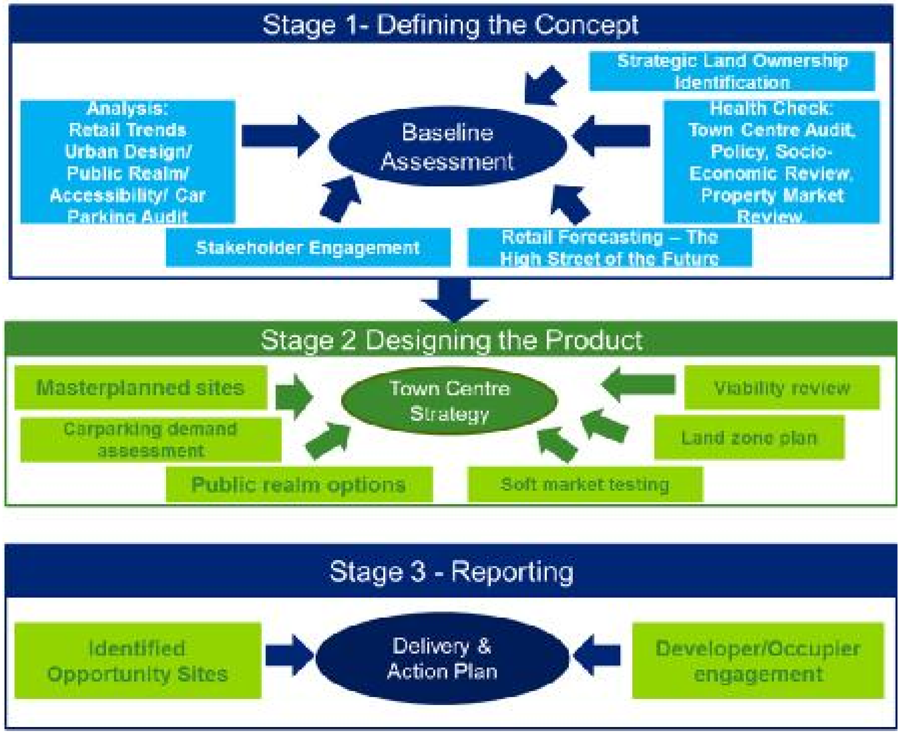
This report is structured as follows:

1. Market Review
2. Chorley Town Centre Health Check
3. Centre Comparator Analysis
4. Land Ownership
5. Socio-Economic Review
6. National Retail Market
7. Car Parking Assessment
8. Urban Design Assessment
9. Opportunity Sites Analysis

The analysis work is based on the following evidence base:

- **Town Centre Audit**: An updated evidence base, including key indicators for the Town Centre which are benchmarked against comparator town centres and an analysis of market trends;
- **Commercial and Retail Forecasts**: Forecasts and analysis for Chorley;
- **Stakeholder Consultation**: On going consultation with town centre members
- **An Assessment of Land Ownership and Strategic Sites:** An analysis of current major landowners within the Town Centre.

Methodology



1.1 Chorley's Retail Offer

Chorley as a Retail Centre

Chorley is a busy market town which is located 22 miles north west of Manchester City Centre, 9 miles south of Preston and 12 miles to the north of Warrington. It has a footprint of 450,000 sq.ft (81,834 sq.m) and this is across 263 units.

The Town Centre historically has grown from a particularly distinctive focus along Market Street. The town centre itself encompasses a network of pedestrianised streets around the centrally located indoor Market Place.

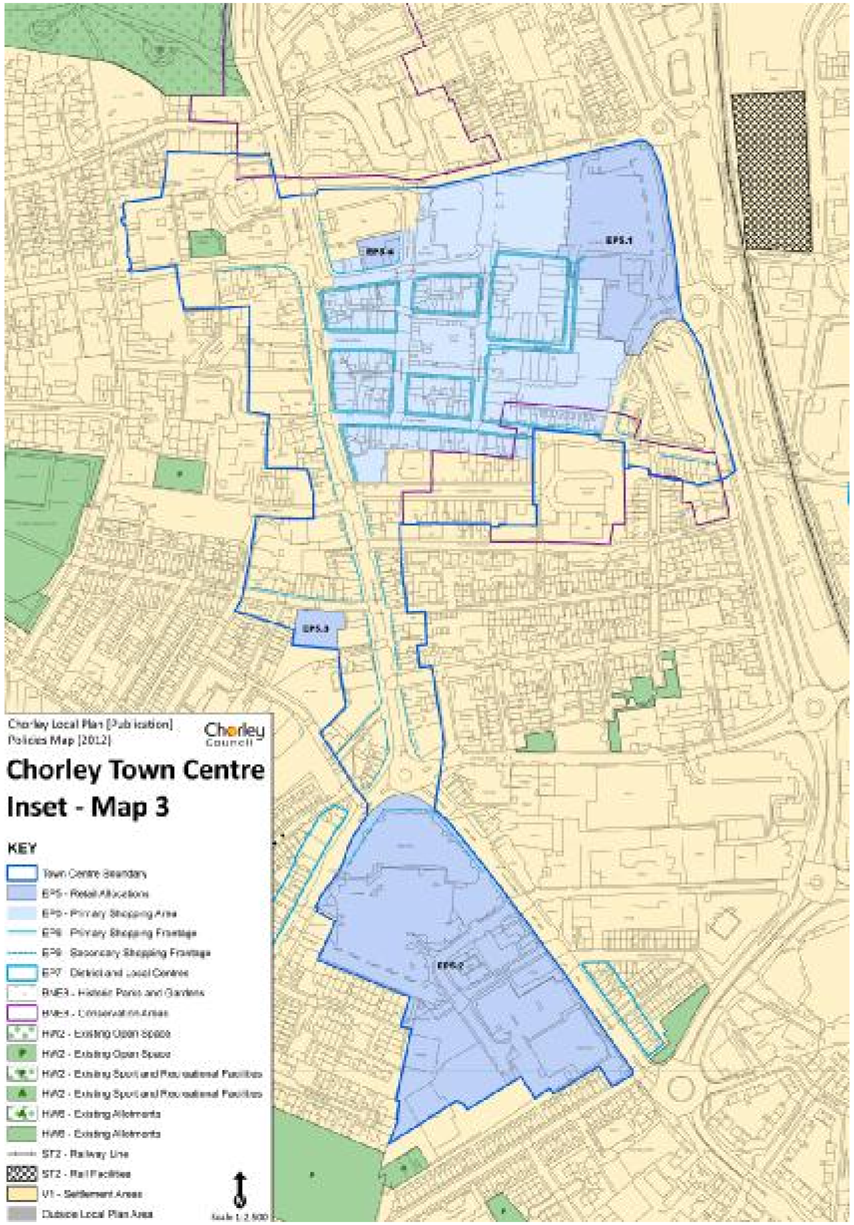
Chorley Town Centre is predominantly focused on comparison shopping with several national multiples present and a large proportion of independent retailers. Convenience retailing is dominated by an in-centre EH Booths and a standalone Morrisons foodstore which is located in an out-of-centre location on Brooke Street.

Chorley serves a relatively localised primary catchment area and this is based upon the market share of the town alongside the proximity of other key sub-regional centres and their retail offer (as calculated by the CBRE National Survey of Local Shopping Patterns).

Chorley benefits from being located close to major motorway networks such as the M61 which links to the wider M65, M62 and M6 networks.

As the map on the right shows Chorley is well placed in the region alongside a number of sub-regional and major retailing centres. Most importantly Wigan, Manchester, Preston and Bolton are key competing centres located within 20-40 minutes drive time of Chorley. They offer a significant amount of retail floorspace and this sits along a number of out of centre retail parks which add to the provision.

1.2 Retail areas



Market Review

2.0 Market Review

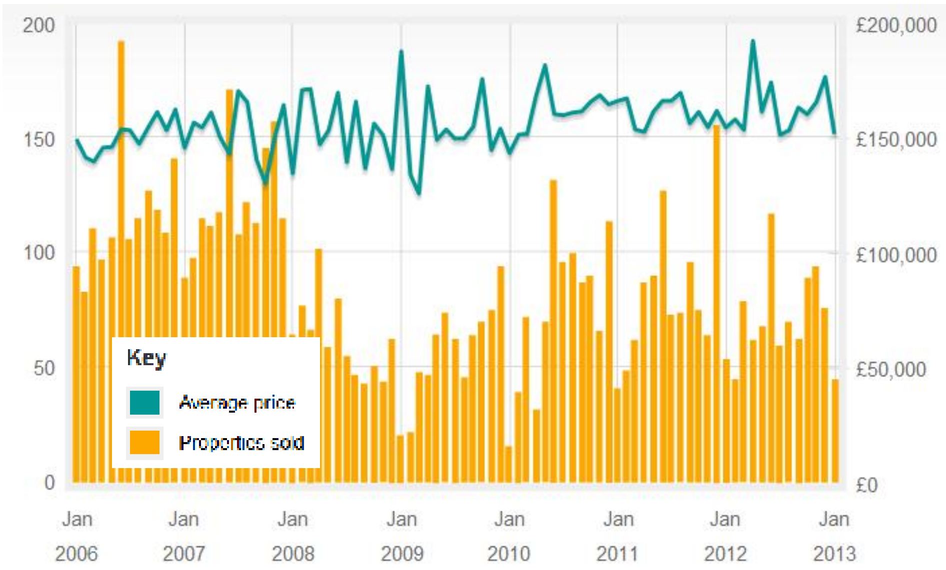
Residential Market

The residential market in Chorley is relatively stable. The fluctuations in house prices and the volume of sales are seasonal and the current average house price is similar to that seen 7 years ago before the onset of the global financial crisis.

Conversations with local agents indicate that the market is showing signs of improvement, with more first time buyers making enquiries than has been the case since the onset of the financial crisis. This upturn in this portion of the market is yet to translate into sales volumes. Though the promotion of the Government backed Help to Buys scheme is thought to be the cause of this improvement.

With a Help To Buy equity loan, purchasers can buy a newly built home with at least 75% of the cost met by a mortgage and a deposit of at least 5% of the purchase price. The rest is paid for by the government through an equity loan.

Average House Prices and Sales Volumes in Chorley

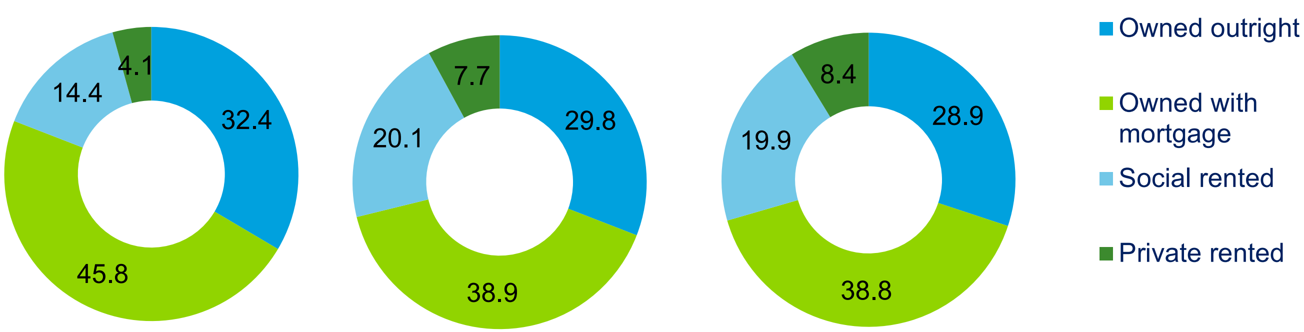


Breakdown by Tenure

Chorley

North West

England & Wales



1. A higher than average proportion of the population of Chorley own their property outright. This potentially generates more disposable income for residents to spend in the Town Centre.
2. A higher than average proportion own their property with a mortgage. This is a positive feature as residents are invested in their location.
3. A lower than average social rented illustrates a higher income population
4. Lower than average proportion of private rented residents illustrates a less transient population.

2.1 New Residential Developments

Chorley Town Centre is compact and is closely linked to the surrounding residential neighbourhoods. It sits close to major motorway networks and has a number of public transport links. The area surrounding Chorley has a number of new housing developments within walking distance of the Town Centre, most of which cater for the family market.

As a general trend, the new housing stock has sold successfully and this potentially brings a new population into the Town Centre. The new developments are illustrated below:

Eccleston Park

Eccleston Park is a new residential development by Barratt David Wilson Homes situated three quarters of a mile south of Chorley Town Centre. The development is fully completed with a total of 73 properties, of which 69 have been sold. The composition is a majority (46) 4 bed properties, with a smaller number of 3 bedroom properties (28) and only one apartment. This indicates that there is a large proportion of new families now living in the area and this provides and opportunity for the improvement of the town centre with the possibility of increased footfall from this population.

Sandhurst Gardens

Sandhurst Gardens is a new residential development by Redrow situated three quarters of a mile south of Chorley Town Centre. 172 new build houses have sold over a 2 year period indicating a strong performance in current market conditions. The majority of purchasers have been young families and first time buyers. A large number of enquiries regarding the Government backed Help to Buys scheme have been observed recently.

Buckshaw Village

There are three phases to the Redrow development in Buckshaw Village including Cedar Walk, The Orchard and The Village Green. Cedar Walk has consent for 110 units. There are 87 completions, with 9 houses exchanged and 1 reserved. The development is expected to be completed by Dec 2013.

The Orchard and The Village Green combined have consent for 222 units. This includes 161 completions, 4 exchanges and 18 reservations. Redrow expect to complete the site by June 2014. There are also 79 apartments in addition but at this time there is no target date set for the construction of these.

2.2 Chorley's Office and other Town Centre Uses

Town Centre Office Market

There is very little office space within the Town Centre and where it does exist, it is mostly for municipal uses.

Address / Location	Total Floorspace (sq.m)	Occupier
St Georges Street	c.20 units- total unknown	Unknown/Vacant
St Mary's Walk	80	Unknown/Vacant
Market Street	380	Unknown/Vacant
Market Street	1230	Council Offices
Union Street	720	Council Offices
George Street	190	Doors and Window Supplier
St Thomas Road	560	Government Building
Library Street	1,240	St Johns Ambulance
St Thomas Road	505	RSM Tenon

Out of Town Office Developments

Chorley Business & Technology Centre is located in Buckshaw, 3 miles north west of Chorley Town Centre, providing a range of small units ranging in size from 50 to 150sqm including serviced offices and twelve light industrial units. It currently has 100% occupancy and has recently obtained planning permission to extend the size of the facility.

Other Town Centre Uses

In addition to the retail and office uses within the Town Centre, there are a number of other facilities including leisure facilities and educational establishments. These include the following:

Chorley Library, Union Street

Chorley Little Theatre, Dole Lane

Runshaw College, Market Street

Chorley Fitness Health Club

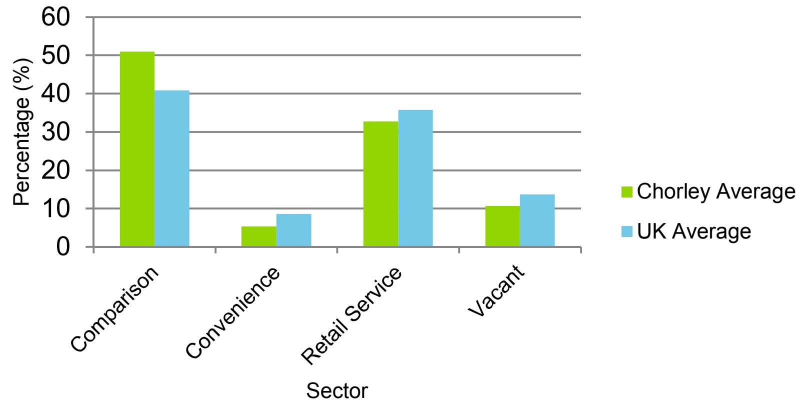
Future Developments

There is potential for a multiscreen cinema located on the edge of the Town Centre. This would be a beneficial addition which would contribute to an evening economy which would potentially stimulate the addition of restaurants and bars .

Chorley Town Centre Health Check

3.0 Retail Health Check

A heath check has been carried out on the Chorley retail environment within the Town which contributes to the overall offer. The following points summarise the findings:



Chorley Town Centre

- Market provision is very good (both open air / covered) and this is a major strength – footfall is particularly high around these areas;
- There is a key concentration of local and independently run businesses which dominate Chorley's main retail offer;
- There is a ratio of 1 high street comparison retailer to 3 independent retailers within the town centre;
- Market Walk contains a small number of high street retailers, notably Boots, New Look and JD Sports;
- There is no department store located within Chorley, however there has been some historic department store interest in Chorley town centre;
- Convenience provision is fairly limited in Chorley Town Centre itself, it is anchored by Booths (Market Street) and there is some smaller provision from Iceland (Market Walk) and a large standalone Morrisons (Brooke Street);
- There is no notable cinema or entertainment provision within the Town Centre, there is however 'Chorley Little Theatre' located on Dole Lane which is home to an Am-Dram group called CADOS who provide for shows, films and comedy performances;
- The provision of cafes and public houses continues to grow, however on the whole leisure facilities are generally limited;
- Generally the unit floorplate size across Chorley Town Centre is varied – however aside from a small number of units larger than 900 sq.m (B&M Bargains and Booths), most range between 50-600 sq.m and generally are of an older format.

Floorspace in the City Centre

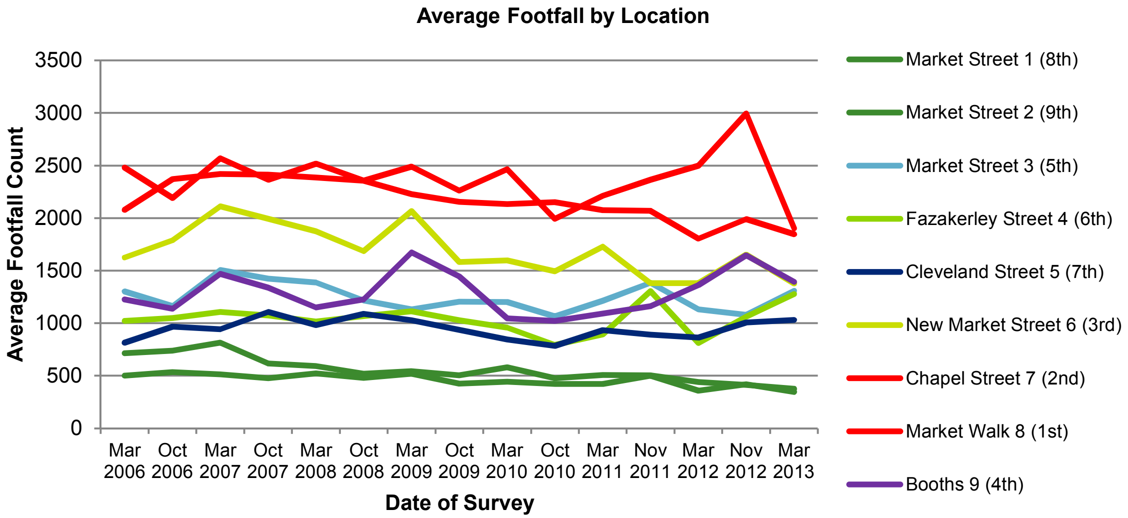
- Market Walk was the last major development in the Town Centre, this was constructed in 1995. Planning permission has been approved (Ref: 12/01169/FULMAJ) for an extension to Market Walk but this has not yet begun construction, there are questions over whether it will be delivered or come forward in its current format.
- The majority of floorspace in the Town Centre comprises of relatively small units that are outdated and currently not attractive to major town centre multiples.
- There have been four key sites identified by Chorley Council for future retail provision, these include the Flat Iron Car Park, Bolton Street / Pall Mall, Gillibrand Street and High Street / Cleveland Street. The development of these sites are likely to introduce new format retail units which does not exist and encourage high street multiples currently not represented in Chorley. These could include:

H&M, Topshop / Topman, River Island, Primark and Next.

3.1 Retail Health Check

Footfall

- On the day the survey work was undertaken by Deloitte Real Estate (March 2013) – highest levels of footfall were recorded at Market Walk followed by Chapel Street;
- The recent footfall data (from March 2013) shows that the highest pedestrian count was noted in Market Walk, Market Street 3 (mid-way up Market Street).
- These trends are consistent with national footfall data which indicate that overall the high street has remained relatively static in terms of footfall since mid-2011, however the highest dips were recorded at the end of 2009-10 in line with the recession hitting.



Retail and Leisure Requirements

- The Health check undertaken as part of the Central Lancashire Retail and Leisure Review highlighted from Focus that there were 10 retail and leisure requirements in January 2009, this is half of the 24 requirements noted in April 2007. Of those with requirements a high proportion are cafes, pet shops and low order retail such as 99p Stores and Poundland.
- There are requirements from new and growing retailers that offer the potential to add to the diversity of the Town Centre offer, there is a need to attract high order fashion retailers to the Town Centre.

Accessibility

- Public Transport and park-and-ride accessibility to the Town Centre is strong, the central Bus (recently invested in) and Train Station also provide direct linkages to the North West and further afield.
- There is numerous car parking available in the Town Centre – around 1,352 spaces across 11 car parks which are both a mixture of short and long stay.

Rents

- Prime rents have fallen in recent years, at mid 2012 Agent sources estimated prime rents in Chorley at £55 per sq.ft for Zone A, this is a decline from mid 2011 which stood at £60 however it is slightly below the PROMIS ‘Small Town’ average of £57 for Zone A;
- A lack of larger floorplate buildings may have placed a constraint on declining rents.

Yield

- There has been limited investment in Chorley over recent years, however, there are key aspirations by the Council to bring forward a number of potential schemes and sites and these form formal allocations as part of the Local Development Framework process.

3.2 Retail Health Check

Vacancies

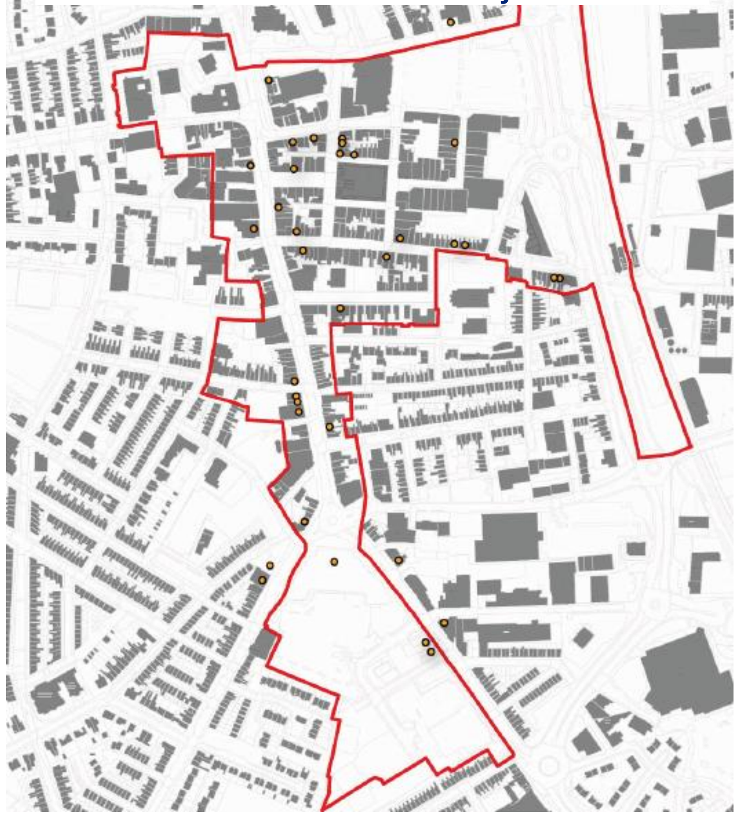
- Vacancy rates are below the national average as a whole;
- GOAD Centre surveys undertaken in October 2012 show that 28 units were recorded as being vacant this equates to 10.65% of the total number of units in Chorley, which is below the UK average of 13.73%. CBC figures report a 7.63 % of vacancy by total floor area.
- Following our survey work (undertaken in March) we noted the following vacancies, which equate to 30 units – an increase of 2 vacancies noted from the period October 2012 – March 2013 by GOAD.
- The types of vacant units tend to be relatively small in nature – measuring no more than 100 sq.m. Whilst they are located on primary shopping frontages they have relatively minimal facades.
- Those larger vacant units are subject to large comprehensive redevelopments within the Town Centre.
- Generally the smaller vacant units have been fairly transient in their occupation – the larger vacant units have tended to stay vacant for much longer periods of time.

Address / Location	Total Vacant Floorspace (sq.m)
Chapel Street	960 (8)
Bolton Street	2,210 (3)
Market Street	1,140 (9)
Market Place / Market Walk	190 (3)
Pall Mall	260 (4 including QS unit)
Other	900 (7)

Environmental Quality

- The primary shopping area within the Town Centre around Market Walk and New Market Street is pedestrianised.
- The Town Centre itself has been subject to ongoing investment in the public realm over recent years, although is appears dated in part it is generally well maintained.
- The secondary shopping area at the southern end of Market Street is of a much lower quality in terms of public realm and shop fronts.

Location of Vacancies across Chorley Town Centre



Centre Comparator Analysis

4.0 Retail comparator analysis

An analysis exercise has been carried out to consider how Chorley's retail performs in comparison to other town centres with similar attributes In 2011, VenueScore ranked Chorley as 248th across all Centres. The following town centres have been identified for the purpose of this analysis:

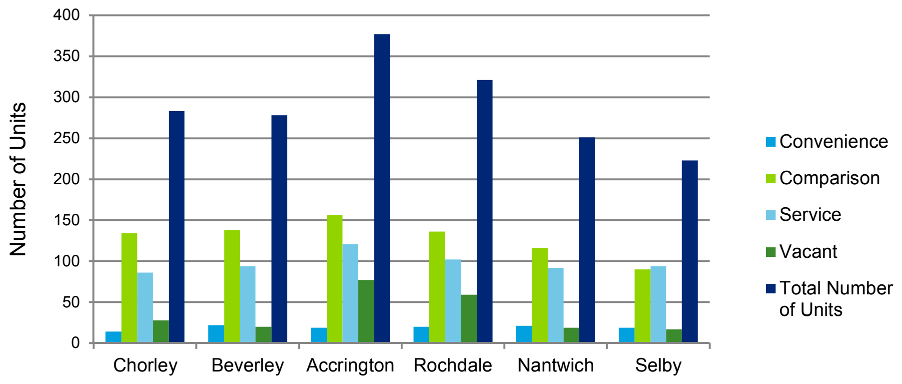
- **Beverley –** the estimated Beverley shopping population is 33,000 and this is around the small town average. There are a range of high street multiples present which include Monsoon, New Look, Dorothy Perkins and two department stores. VenueScore ranks the centre at 260th;

- **Accrington –** similarly has an estimated shopping population of 33,000 and this is around the small town average. There are a small range of high street multiples, notably Bon Marche, New Look and Burton, there is, however, an M&S present which Chorley lacks. VenueScore ranks the centre at 338th;

- **Rochdale –** although classed as an 'average town', it has an average shopping population is 67,000, whilst this is larger than the other two comparators there is a similar retail offer, with retailers such as Bon March, JD Sports, New Look and River Island with department stores such as M&S and Whitakers present. Venue Score ranks the centre at 203rd;

- **Nantwich –** although classed as a District Centre – Nantwich has a similar retailing role to Chorley in terms of number of outlets and playing towards a generally independent market dominated by comparison retailing. VenueScore ranks the centre at 681st;

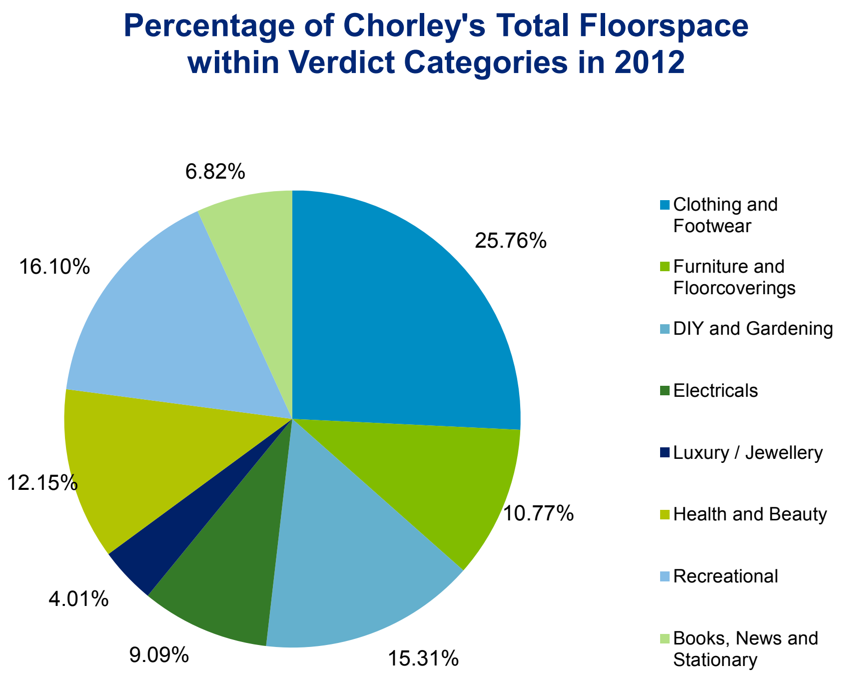
- **Selby –** is another Market Town not dissimilar to Chorley and although has a smaller amount of outlets across the retail trade groups, it has a similar retailing function and role. VenueScore ranks the centre at 442nd.

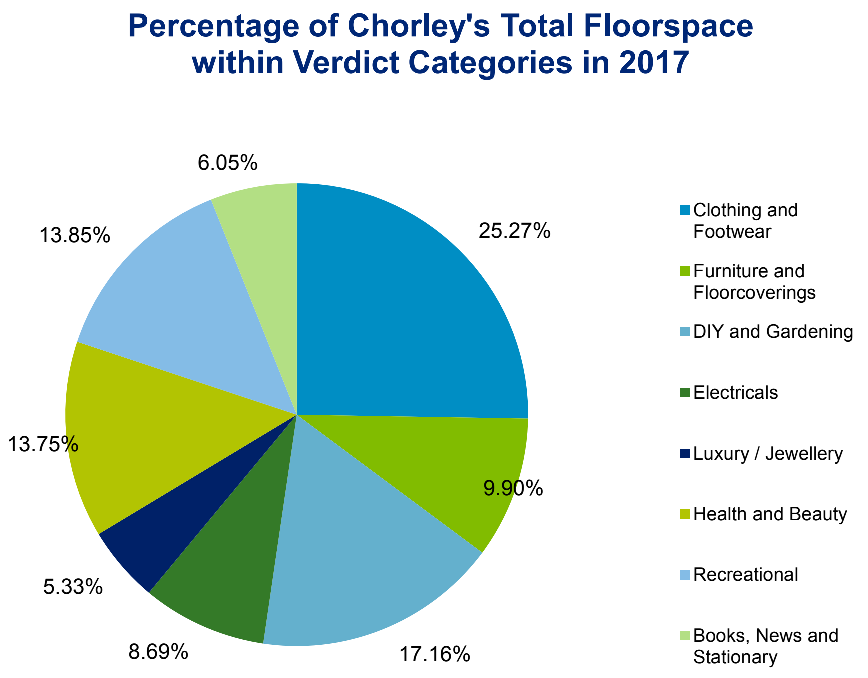


The following chart represents the sector percentage comparisons, demonstrating that:

- Chorley has a larger presence in the convenience sector than an average sized town centre;
- Chorley has a strong representation of comparison units but does not accommodate for high street multiples who require well configured units;
- Chorley's vacancy rate is lower than other comparator town centres used, however a tired and outdated retail unit offer will be unattractive to modern retailers;
- From VenueScore, Chorley has a middle ranking in terms of the other comparator locations but it has the most limited comparison retailing offer in terms of high street multiples.
- There is a need for Chorley to consolidate its retail offer by focusing on the 'retail core' and adapting to the needs of modern retailers.

4.1 Retail Forecasting





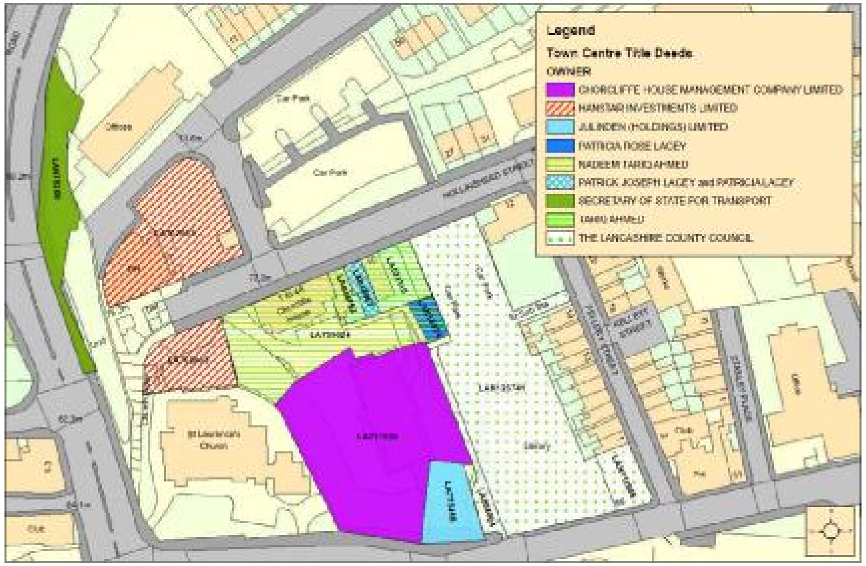
- The above graphs show the likely change in floorspace within Chorley Town Centre by sector when forecasted in line with the growth as forecast by Verdict. The difference in floorspace is relatively minimal and this is relative to the total footprint of comparison goods floorspace which is circa 19,500 sq.m.
- The most considerable shifts are within the DIY and Gardening sector with a growth of 443 sq.m and also within the Health and Beauty sector with a growth of 377 sq.m. The sectors with the most significant losses in floorspace are Recreational sectors (-339 sq.m) and Books, News and Stationary (-111 sq.m).
- However, the percentages above assume a constant market share which will inevitably be affected by any retail developments with in the catchment including out of centre retail proposals. Given the current market shares, the Town Centre would not be able to withstand these changes to retail patterns.

Land Ownership

5.0 Land Ownership

We have undertaken a land ownership mapping exercise which has been focused on the potential areas of change. The maps identify that there are very few large scale ownerships the majority of which is held by Chorley Council and some private individuals**.** This provides a good understanding of the ownership issues and the strategic action which would be needed to bring forward development on these sites.

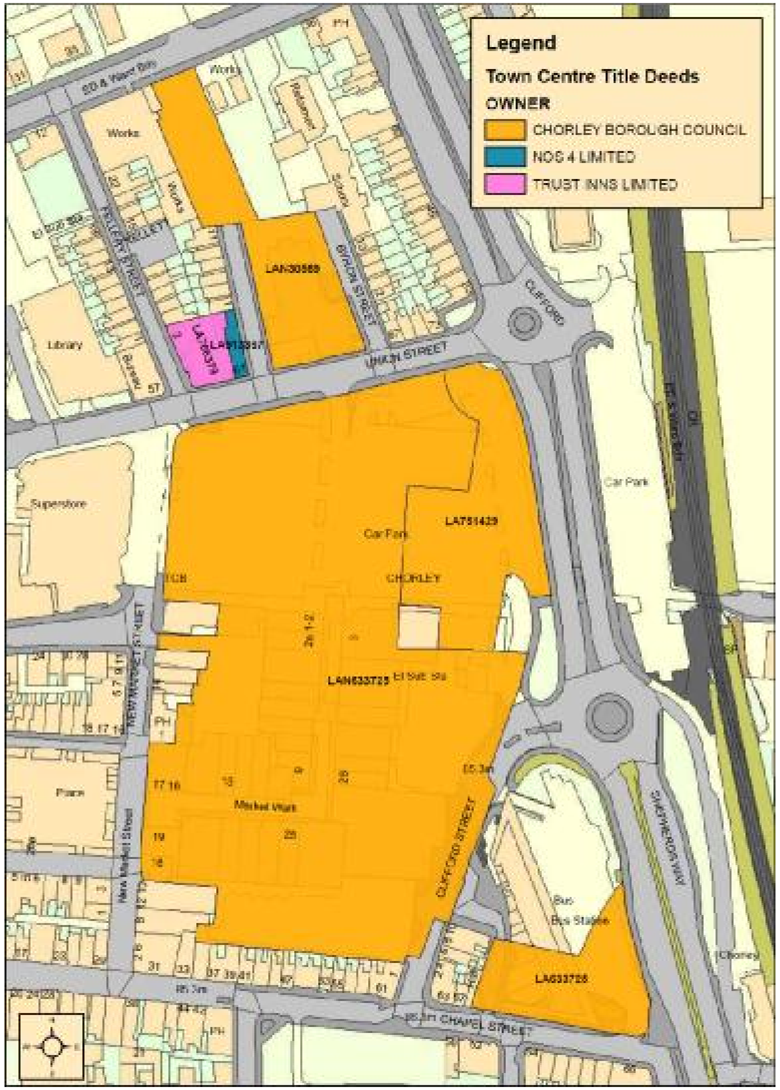
Site 1: North of Union Street



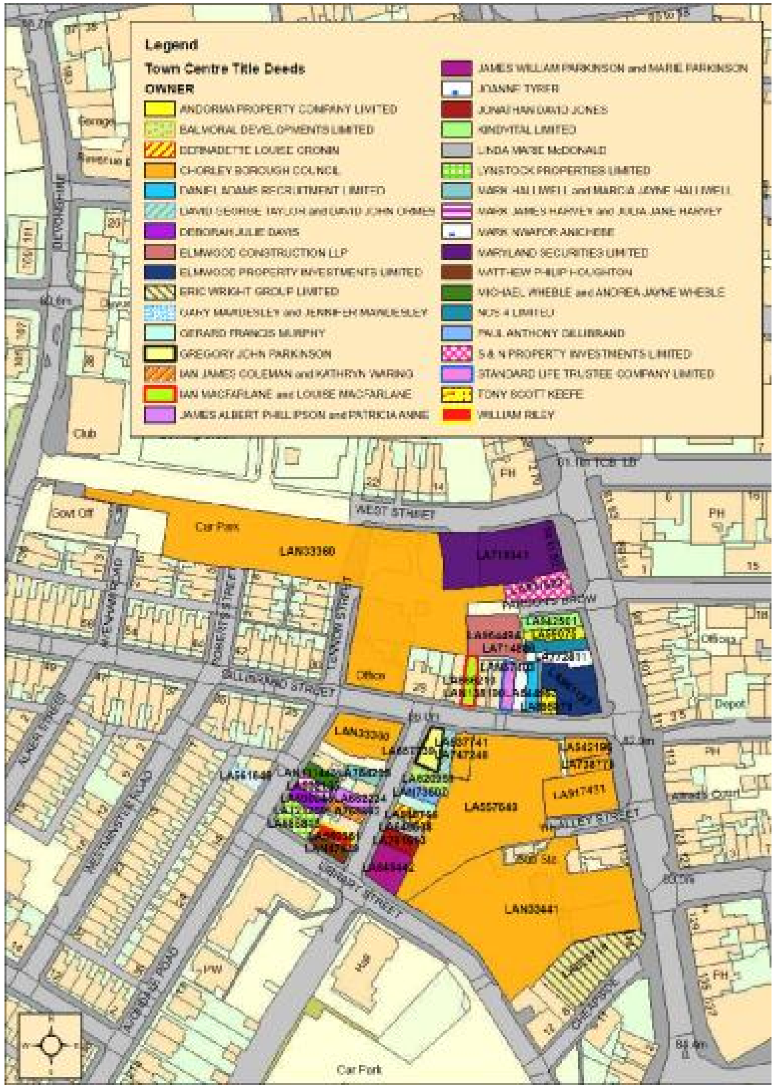
Site 2: Land off Cleveland Street

5.1 Land Ownership

Site 3: Flat Iron and Environs



Site 4: South Market Street

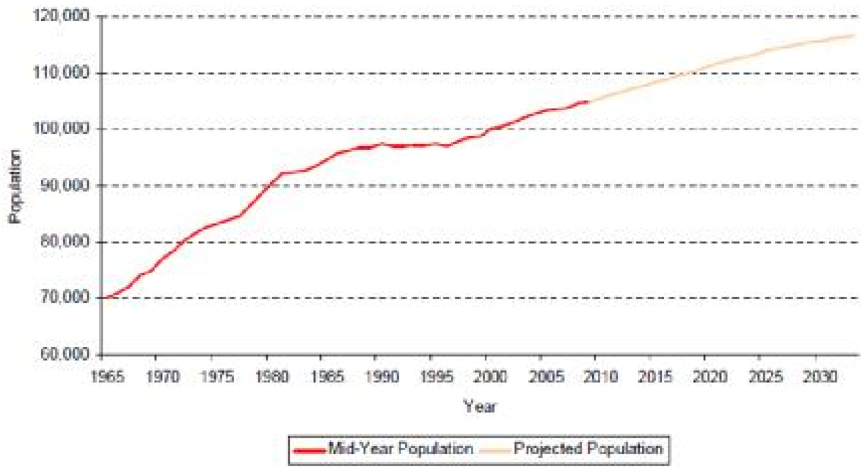


Socio–Economic Review

6.0 Socio-Economic Profile

Sitting parallel to a review of the current retail offer and the wider retail and leisure markets in Chorley, it is also important to understand the Socio-Economic profiling of the area in order to inform those recommendations that will form part of our final report.

During the 1980's Chorley Borough was one of the fastest growing districts in the country following New Town status. Chorley's population has continued to grow significantly, in 2011 Experian predicted that Chorley's population stood at around 134,104, with around 57,153 households. The graph below (extracted from the Chorley profile 2010) shows how the population is anticipated to grow over the period 2010 – 2030 for Chorley Borough as a whole and this already under estimates the population as it stands currently.



In 2009 it was estimated that 19.8% of the Chorley population was aged 60 or over, but by 2020 it is estimated that 27,100 (24.4%) of the population will be in this age range, above national and regional averages.

In Chorley, in 2008 around 65,500 people were deemed to be of *working age* which include both males and females aged 16-64, this is likely to be significantly higher in 2013. The unemployment rate in Chorley has increased over recent years, it stood at 6.2% in 2009 (post beginning of the recession) an increase from 2.9% in 2008, however this still remains below the North West and Lancashire average.

A total of 48% of residents in employment worked within Chorley Borough and 52% travelled outside of the Borough to work. The 2001 Census of Population showed that the average distance travelled by Chorley Borough residents to fixed places of work is 14.9 km. The majority of residents working outside the Borough work in other Borough's within Lancashire and Greater Manchester. There are however a significant number of residents working outside the North West with some residents travelling as far as London.

Out of the 81.8% who are currently employed, these sit within a number of key sectors, the most dominant are shown below.

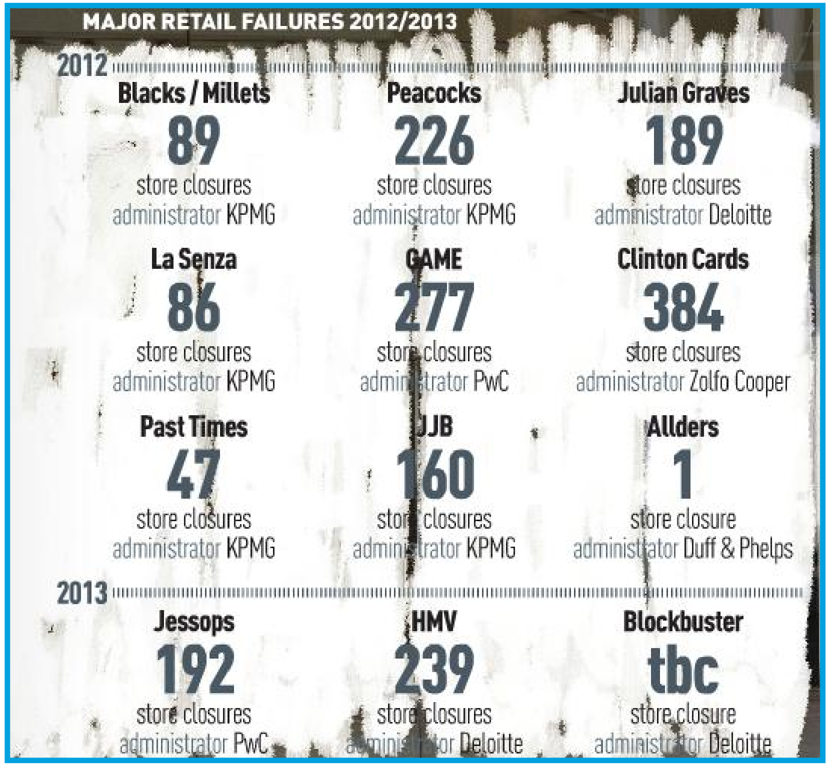
Sector	% in 2008
Wholesale, retail trade; repair of motor vehicles, motorcycles	**16.5**
Administrative, support service	**11.4**
Education	**10.9**
Human health, social work	**14.2**

Expenditure per head for both convenience goods (£1,936 per person in 2011) and comparison goods (£2,884 per person in 2011) is anticipated to increase year on year. The retention in Chorley Town Centre is central to this masterplan.

National Retail Market

7.0 Retail Market Forecasting – Current Market Conditions

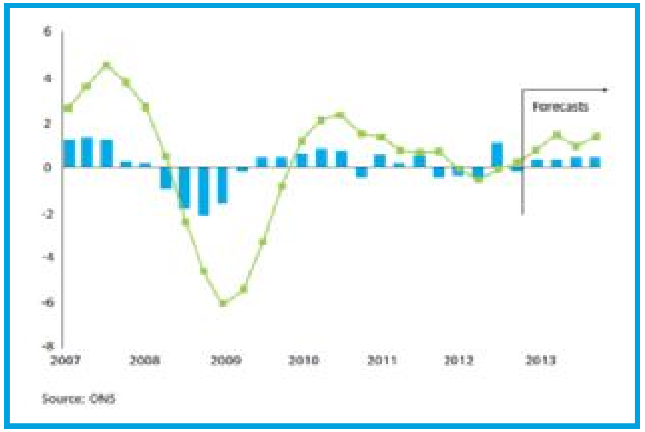
Nationally, the retail market has undergone a period of turbulence. With town centres continuing to struggle, Verdict predicts that 2013 will be the 5th consecutive year that sales will be in decline and as a result of which there have been a number of administrations.



There were 4,700 net store closures (multiples) in 2012 compared with 2,400 closures in 2011. Alongside this there were 194 administrations in 2012 compared with 183 in 2011.

However, we can see from the graphs below that consumer spending was propped up in 2012 by private sector job creation and a sharp fall in the consumer price inflation. GDP growth continues to remain fairly static and it is likely that this will remain weak in 2013.

GDP Growth



UK Consumer Spending Annual % Growth

7.1 Retail Market Forecasting – Changing Role of Town Centres

It has been recorded that around 1 in 7 shops are currently vacant on the high street. Verdict notes that the struggles on the high street have been attributed to the strong growth of online in areas where the town centre has historically been particularly strong like music, video and clothing, and this is set to continue, Similarly sales via neighbourhood and out of town have been supported by food and grocery sales.

With the move towards online retailing, the model of the town centre is set to shift. Verdict notes that it will be used:

- More for leisure activities with more bars, restaurants, food-to-go outlets and community spaces opening in vacant units;
- More to support the e-retail channel with click and collect points and safe drop boxes for customers to collect their online orders as well as satellite stores opening for customers to make online purchases.
- Secondary and tertiary space will also be converted into residential space as it is of less use to retailers and other businesses due to the low levels of footfall in these areas.

Implications for Chorley Town Centre

This emerging model for the town centre has a number of implications for Chorley Town Centre which can be discussed as follows:

1. A need to develop the idea of 'Click and Collect' within the town centre and the development of wireless technology to enhance this;

2. A consolidation of the current retail offer and a strengthening of the 'retail core;'
3. Opportunity to attract a 'flagship retailer' in order to enhance the retail offer;
4. A coordinated approach to possible future out of centre retail to ensure the Town Centre remains 'fit for purpose;'
5. Using footfall data to improve dwell time and increasing awareness of what is on offer – providing a mix which is what local people want and need;
6. Promotion of the wider area more, to encourage further investment in jobs, and in the town centre, to persuade and cater for local residents to spend their money in the area and support the town further.

7.2 Themes for 2013

Mobile optimisation

- Smartphone & tablet dominance in the customer experience

- Responsive design and enhanced content for any device, any location

- Mobile into the C-suite

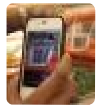
Payment innovation

- Contactless becomes ubiquitous

- Digital wallets go mainstream

MCX

- Customer brings the till



Sainsbury's
Walmart

Targeting & personalisation

- Multichannel retailers take on the pure plays

amazon
ebY

- Real-time decisioning

shopkick

- Context-relevant propositions

TESCO
John Lewis

Faster fulfillment

- Customer expectations raise the service bar

ORDER BY 9pm

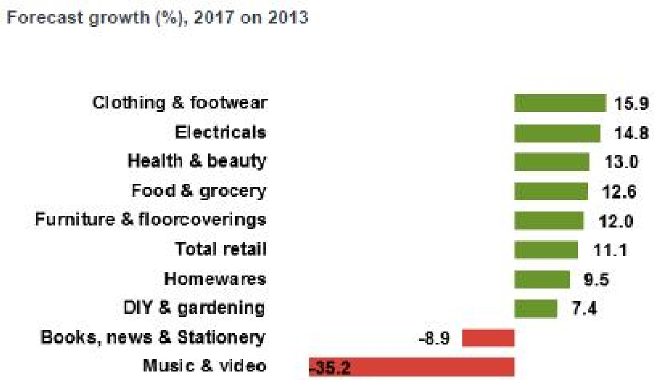
- Real-time enterprise stock visibility

AURORA
NORDSTROM

- Competitive advantage

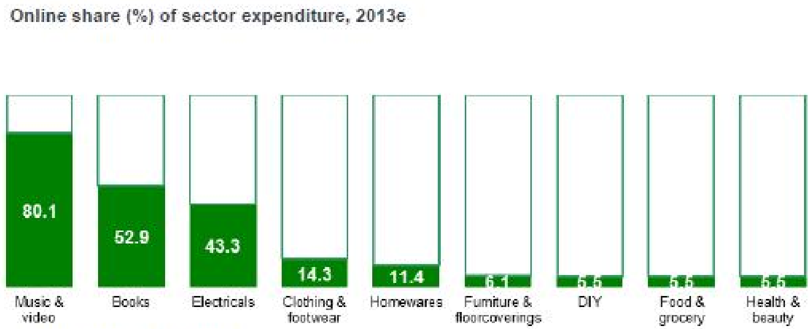
7.3 Retail Market Forecasting – Growth Sectors

Verdict has undertaken considerable research into the changing retail market and this allows us to identify key growth sectors. The graph below highlights the forecast growth in 2017. Interestingly, a comparison with those forecasts made for 2015 we can see that overall there is more positivity across sectors (previously DIY and Gardening and Furniture and Floorcoverings were anticipated to see declining growth). However, for some of the high performing sectors such as Clothing and Footwear and Electricals these are expected to see a more muted growth from that predicted in 2015.



There is no doubt that the role and function of the High Street is changing amidst pressure from the online retailing world. There is an inherent requirement for high streets to become more flexible and adaptable to the changing needs of retailers.

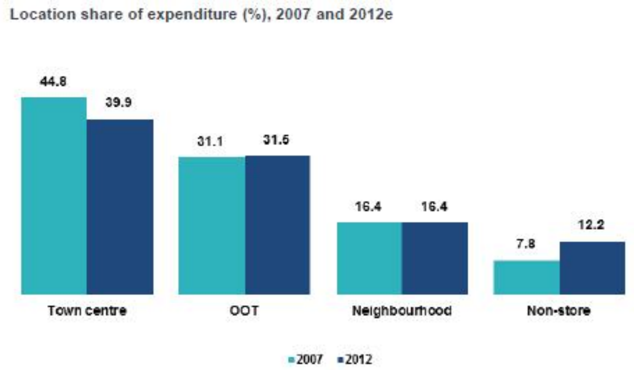
As e-commerce and multi-channels becomes much more prominent the nature of the high street will require approaches towards what the function of a town centre is and how best to achieve it. The graph on the right indicates the online share of expenditure of key retail sectors and this is in line with those areas which are set to decline on the high street and the rise of technological items.



Source: Verdict Research

As well as the growth of online retailing and the changing role of the town centre. It is also important to acknowledge the changing patterns of shoppers themselves. Four key trends can be noted:

- More fragmented shopping experience;
- Integration of online shopping with local convenience shopping;
- Out of town big ticket and food shopping; and
- Destination shopping as part of a wider leisure and entertainment experience.



Source: Verdict Research
Note: non-store includes online and mail order home shopping

Car Parking Assessment

8.0 Traffic and Transportation- Surrounding Highway Network

Strategic Highway Network

The M6, M61 and M65 all pass through the Borough of Chorley ensuring that the town centre is well served by major areas in the north west with excellent transport links to Blackburn, Manchester, Preston, and Warrington.

The extensive network of A and B roads connects the town centre with the M6 at junction 28, and M61 at junction 8. The M65 can be accessed just south of Preston at junction 1 or 2 via the M6 and M61 respectively. The A and B roads around Chorley town centre also provide connections to Preston, Blackburn, Bolton and Wigan.

Local Highway Network

Chorley town centre is bisected by the A6, which runs on a north/south alignment past Chorley Train Station. The A6 links Chorley to suburbs of Preston in the north and to Adlington in the south.

Cycling Network

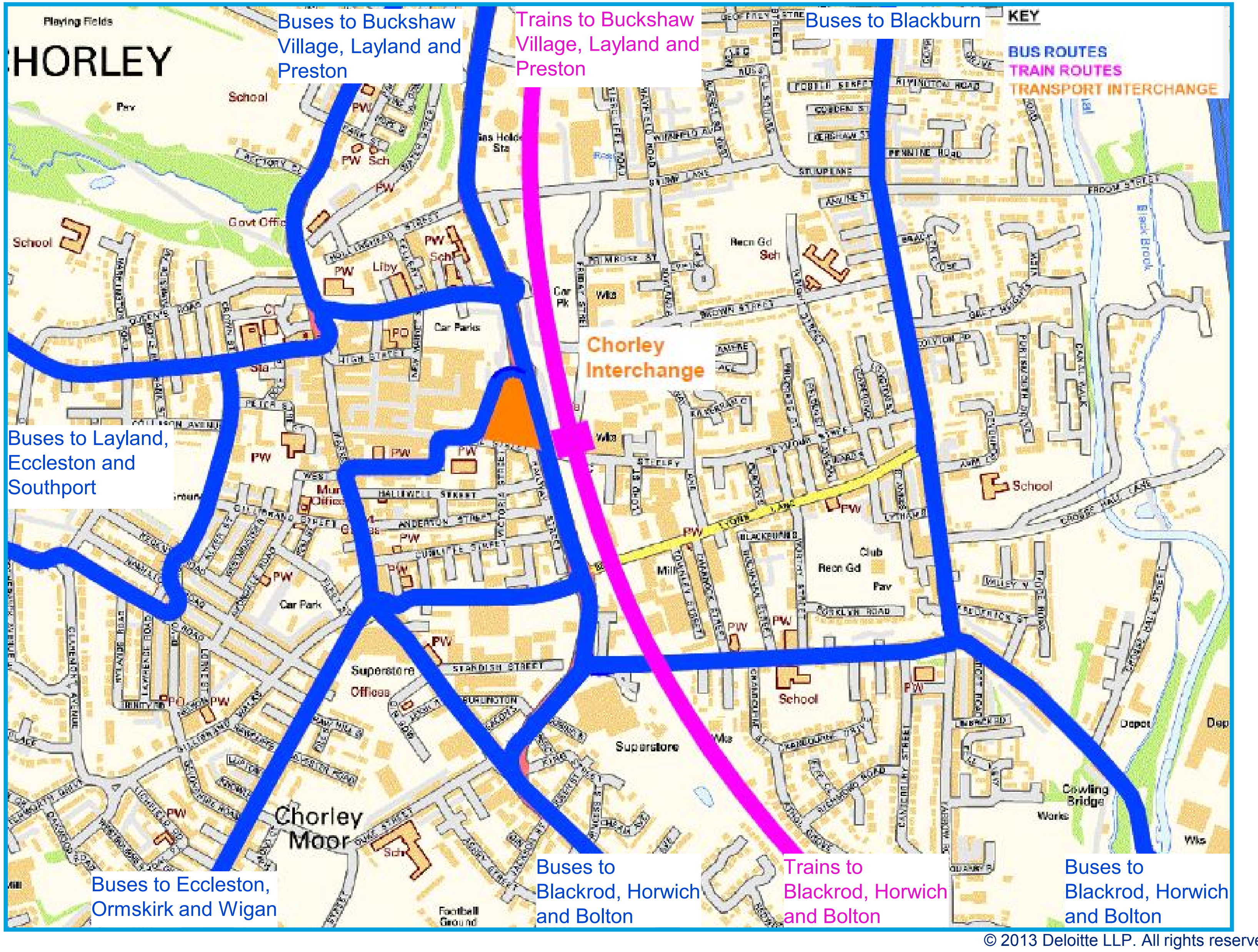
National Route 55 travels north from Astley Park in the centre of Chorley to Preston. National Route 55 also travels south along a canal path approximately 1km east of the town centre towards Wigan.

There are additional local cycle routes surrounding the town centre linking to National Route 55. These consist of both on road and off road cycle routes.

Pedestrian Network

Footway provision is generally good throughout Chorley town centre. The retail core is extensively pedestrianised, most noticeably along Market Street and Chapel Street. Market Street is shown in the image below:

8.1 Traffic and Transportation- Sustainable Transport Opportunities



8.2 Traffic and Transportation- Chorley Car Parks

Current Car Park Capacity

There are approximately 1408 publicly available car parking spaces provided across Chorley town centre in various long and short stay car parks.

Chorley Council operates all Pay and Display car parks under the following conditions:

- Charges apply to all vehicles parked between the hours of 8am and 5pm Monday to Friday, and 8am and 1pm on Saturdays;
- No charges apply during the evening, on Saturday after 1pm and all day on Sundays and Bank Holidays; and
- Holders of official disabled permits may park for up to four hours free in any space throughout car parks.

The table below identifies the car parks with their associated spaces:

Car Park Type	Car Park Name	Capacity
Short Stay	Portland Street	88
	Flat Iron	384
	Hollinshead Street	53
	Back Mount	19
	St Marys	44
	West Street	117
	Fleet Street Short Stay	56
Long Stay	Friday Street North	66
	Friday Street	164
	Water Street	71
	Queens Road	96
	Farrington Street	53
	Fleet Street Long Stay	164
	George Street	33
Total		1408

In addition to the current provision, the recently approved ASDA store located off Bolton Street/Pall Mall to the south of the town centre would also deliver 435 car parking spaces which will be available for town centre shoppers.

It is understood that the ASDA car park would be available at no cost although duration of stay will be limited to a maximum of 3 hours.

Current Car Park Charges

Flat Iron short stay car park has increased charges in comparison to the other short stays. However with this exception, there is a standard charge for pay and display in Chorley. The charges are represented in the tables below:

Flat Iron Car Park Only		
Period	Tariff	
1 hour	£0.50	Further 10p for each extra 12 minutes
2 hours	£1.00	Further 10p for each extra 6 minutes
3 hours	£2.00	Further 10p for each extra 3 minutes
4 hours	£4.00	

All Other Short Stays		
Period	Tariff	
1 hour	£0.50	Further 10p for each extra 24 minutes
3 hours	£1.00	Further 10p for each extra 6 minutes
4 hours	£2.00	

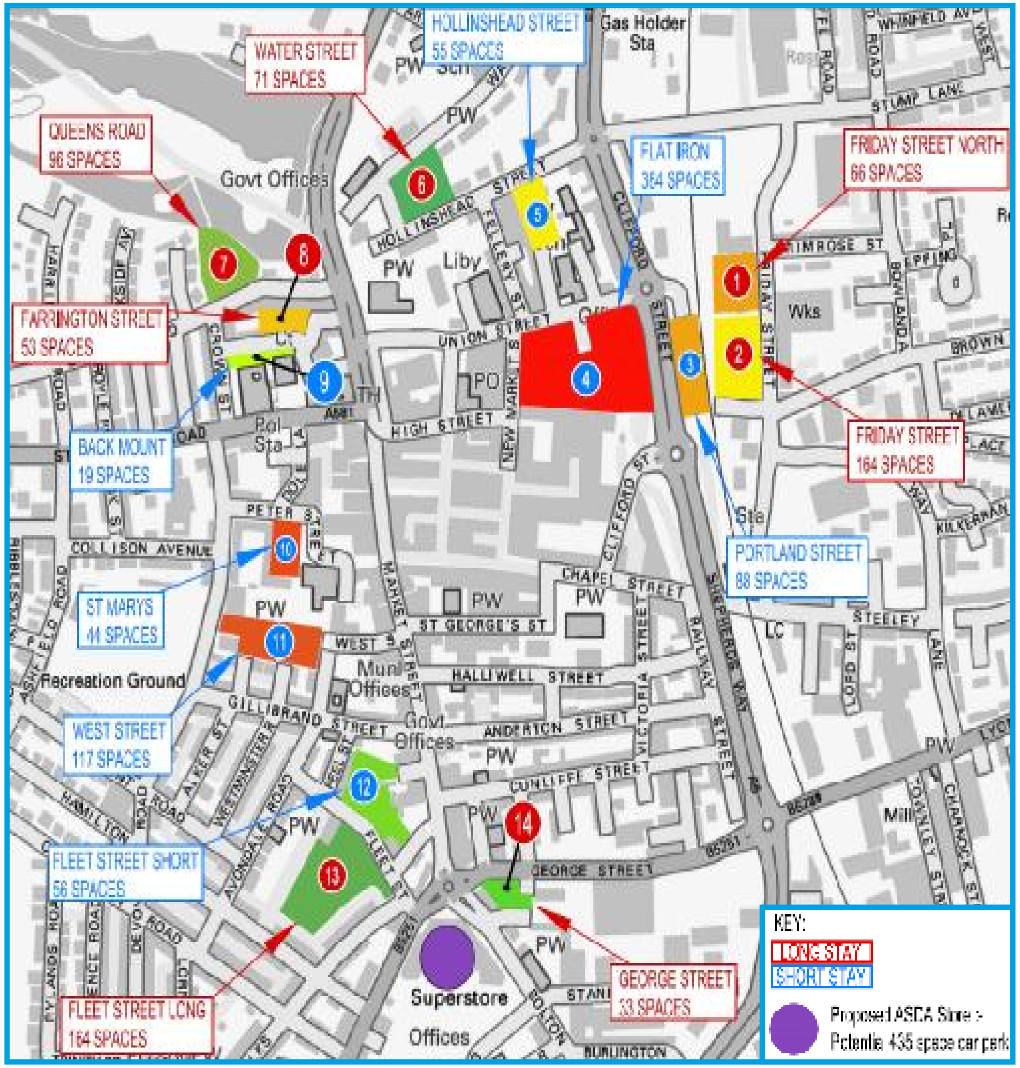
All Long Stays	
Period	Tariff
3 hours	£1.00
4 hours	£1.40
All Day	£3.50

8.3 Traffic and Transportation- Car Park Usage Assessment

Car Park Usage

A car parking survey was undertaken at all car parks during each Saturday between 17/11/12 and 09/01/13. These surveys include the build up to Christmas and the New Year period; which are peak times for seasonal shoppers. The number of empty spaces at each car park was recorded at two separate times during each Saturday surveyed, and expressed as an average count in the table below:

Car Park	Empty Spaces	Spare Capacity
Friday St north	30	45%
Friday St	114	69%
Portland St	42	48%
Flat Iron	33	9%
Hollinshead St	37	69%
Water St	63	89%
Queens Rd	80	83%
Farrington St	33	62%
Back Mount	14	76%
St Marys	7	16%
West St	38	33%
Fleet Street short	45	81%
Fleet Street long	136	83%
George St	26	78%
Total	696	49%

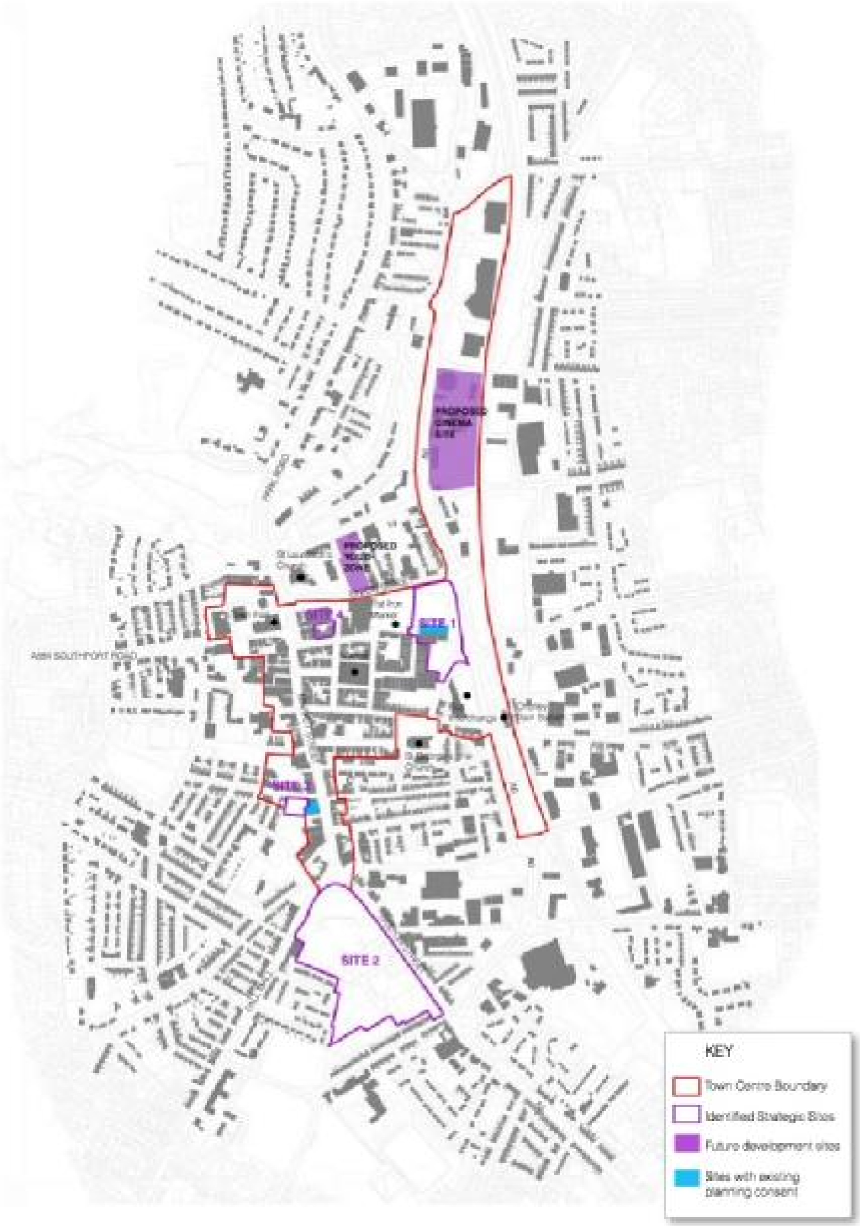


The thematic plan (right) shows car parks with greater spare capacity highlighted in dark green through to little or no spare capacity highlighted in dark orange/red. The plan demonstrates the following:

- That Flat Iron, St Mary's and West Street car parks all experience high demand;
- That Water Street, Queens Road, Fleet Street long stay and George Street exhibited the highest levels of spare capacity; and
- In general, short stay car parks experience the greater demand.

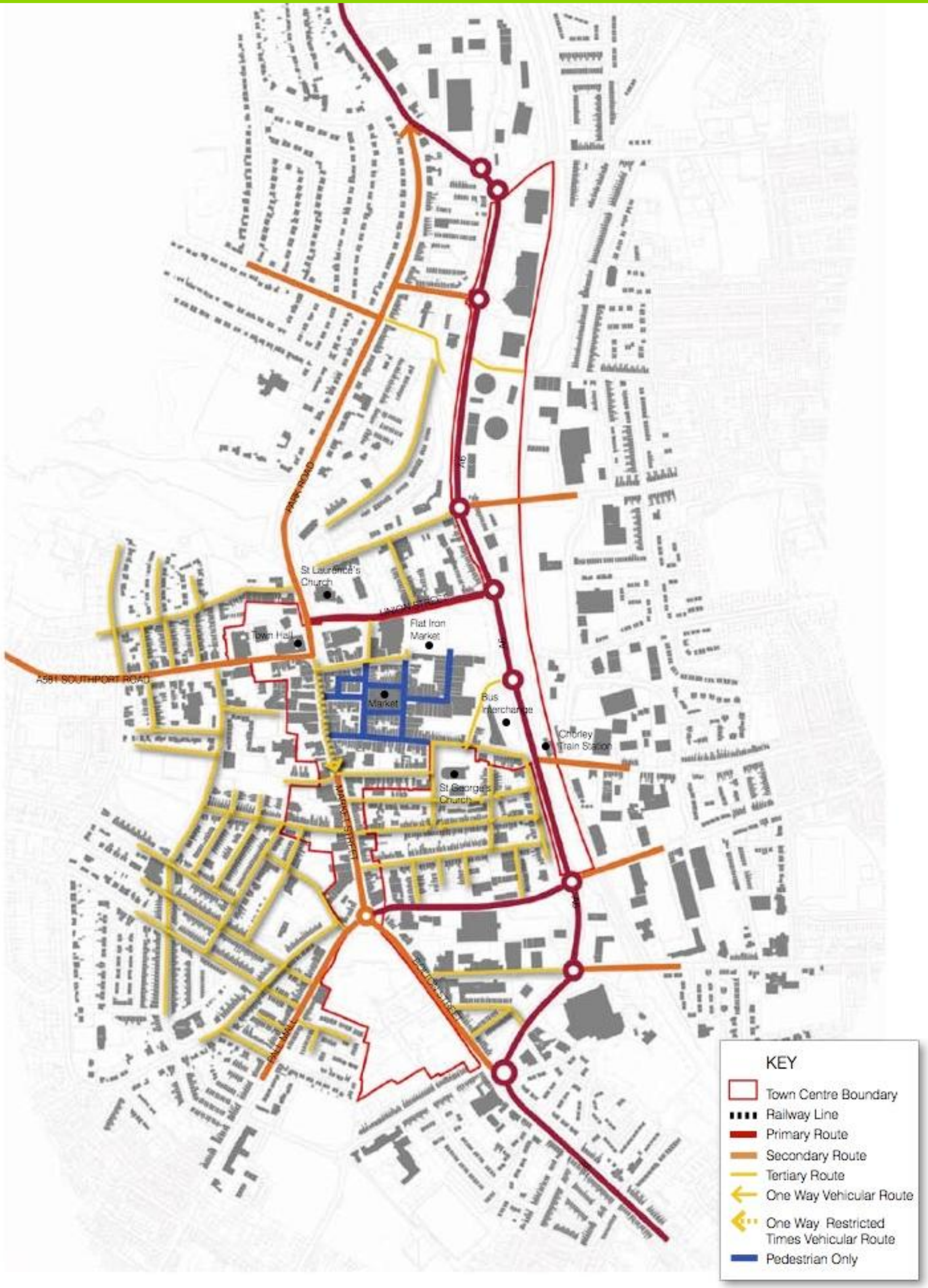
Urban Design Assessment

9.0 Strategic Development Sites Location



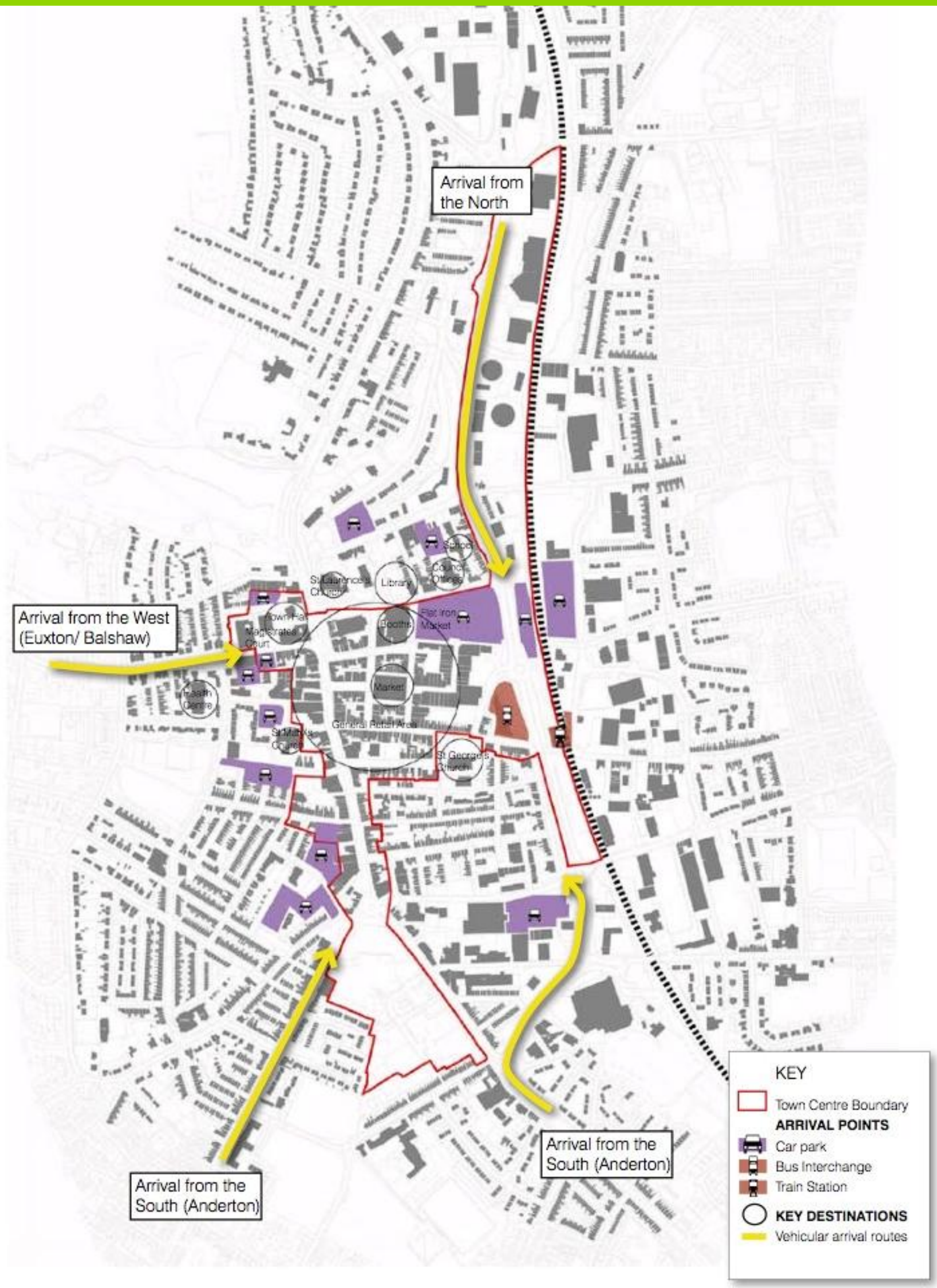
- The adjacent plan highlights the strategic development sites, sites were know future development is taking place and sites with existing planning consent.

9.1 Existing Movement Hierarchy



- This plan outlines the existing movement hierarchy in Chorley Town Centre in terms of vehicular and pedestrian movement.
- Primary vehicular traffic moving through Chorley is taken North-South via the A6.
- The one way restricted vehicular route North-South via Market Street restricts north - south connectivity.
- Pedestrian only areas lead to a lack of overall legibility for drivers accessing the town centre with routes being re-directed around the pedestrian core.
- A fine urban grain and network of residential streets provides a connected movement network within the majority of the town centre, however there are significant one way only streets to the east of Market Street which limits movement.

9.2 Existing Arrival and Destination Points



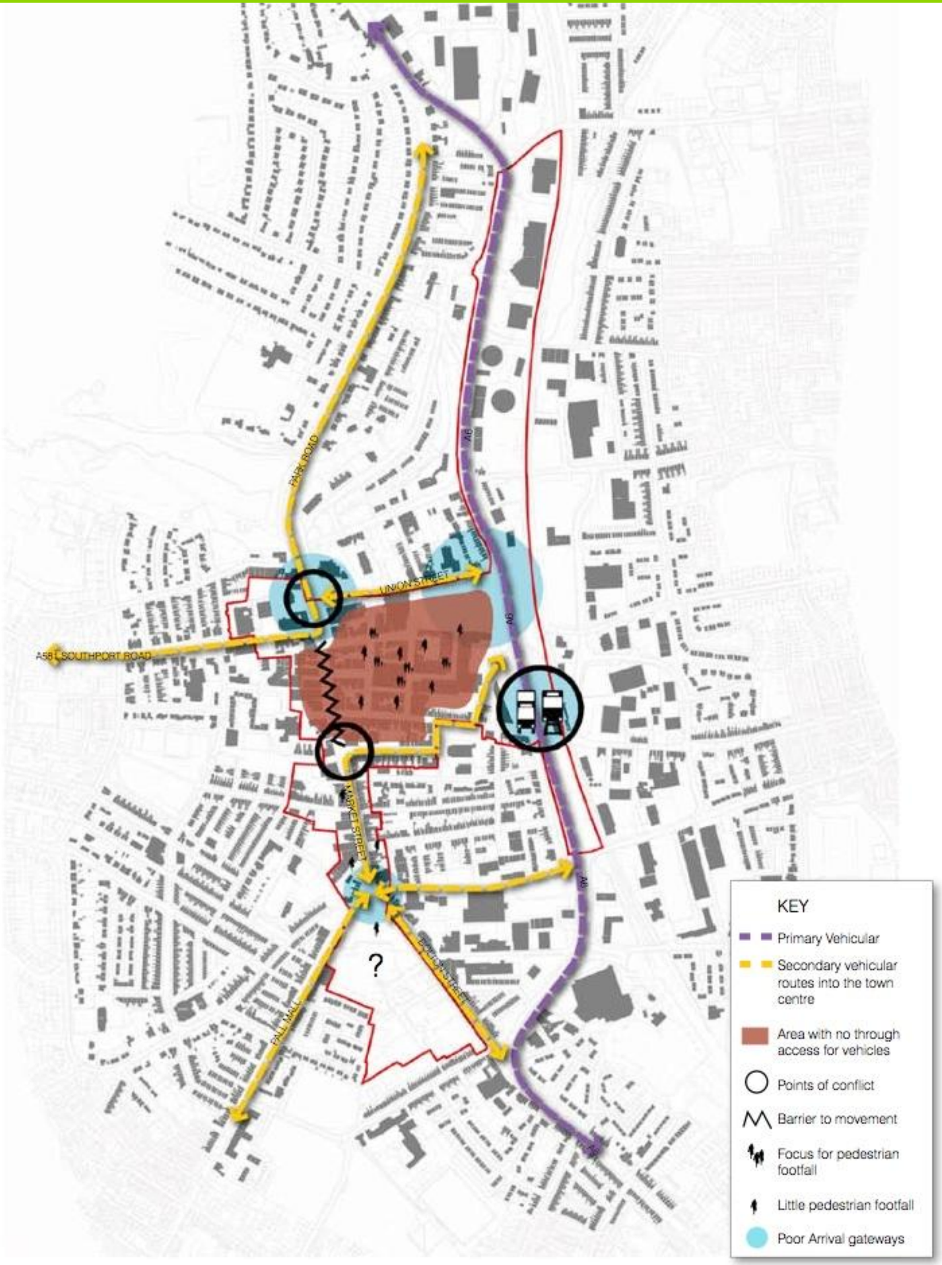
Existing Arrival and Destination Points

- This plan identifies the key arrival points into the town centre and potential destination areas.
- Key Arrival points include: the Interchange, the Train Station and town centre car parks.
- Key destinations include; the market; the Library, the Town Hall, Market Walk, general retail area, St Lawrence's Church and St Georges' Church.
- These are all focused to the north of the town centre.

9.3 Existing Public Spaces and Green Space

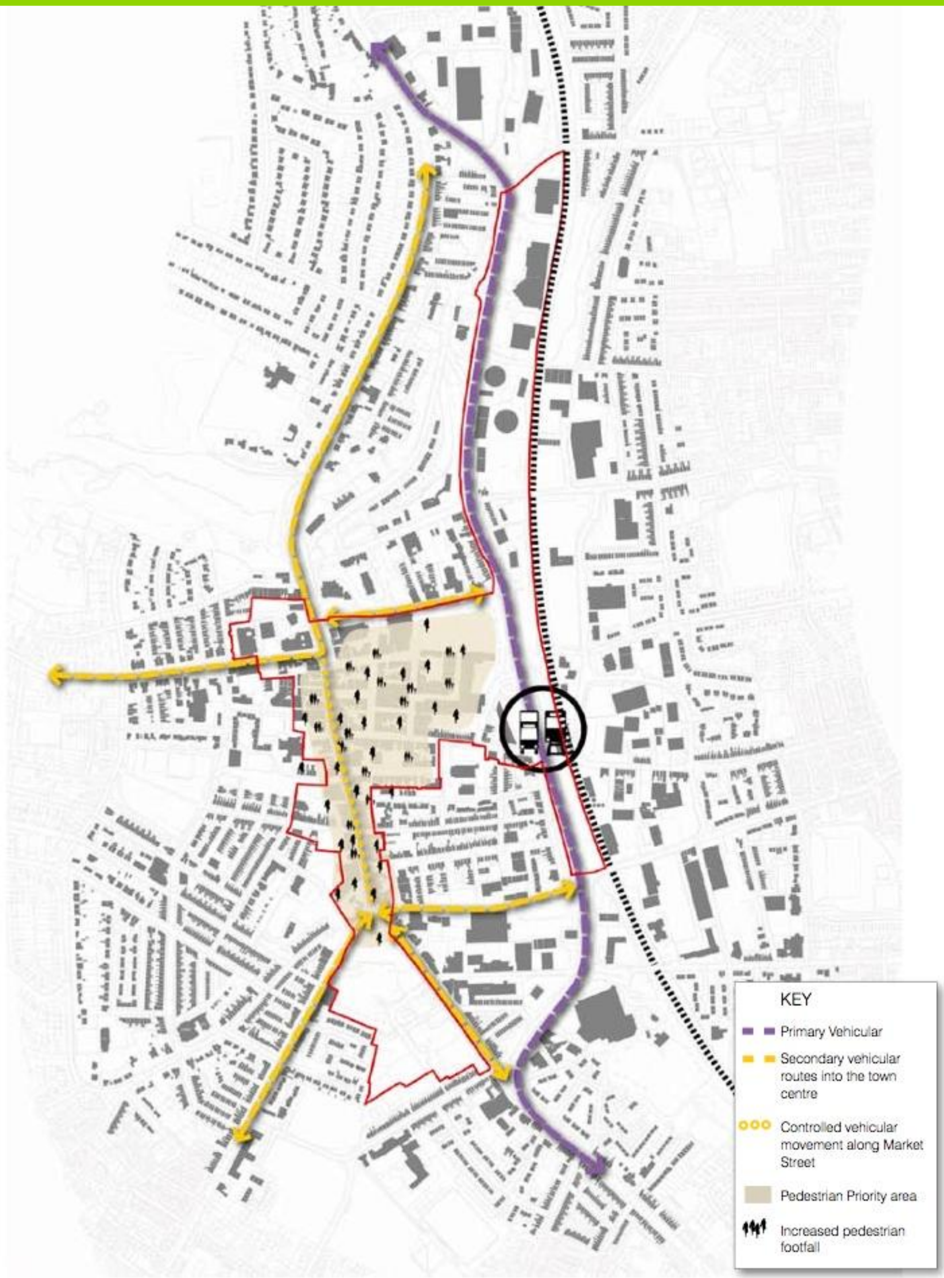
- The adjacent plan highlights the key public space and green space destinations in Chorley Town Centre.
- There is s definite lack of significant public space within the town centre.
- Astley Park is a significant public park to the north of the town centre.

9.4 Issues: Movement



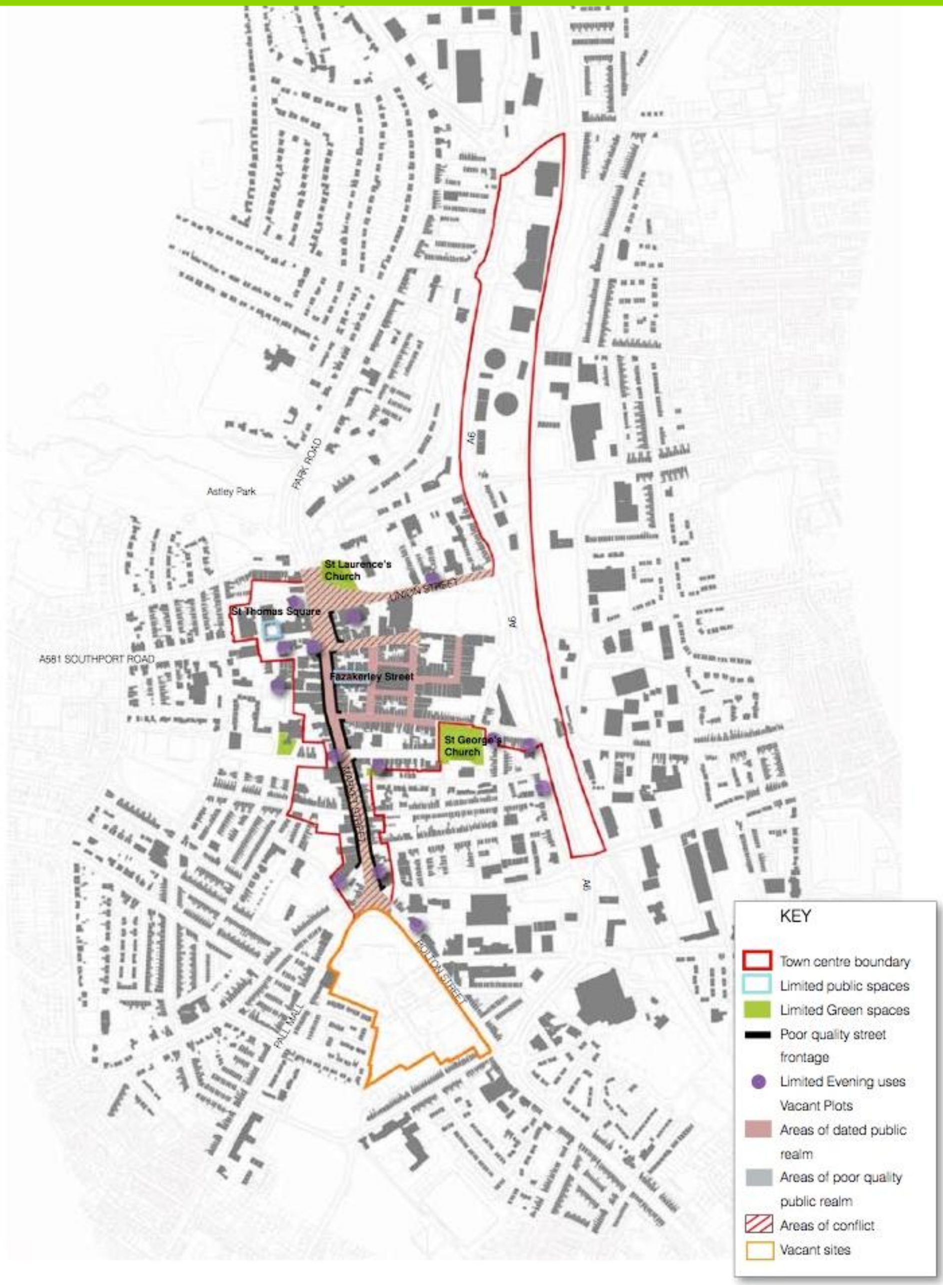
- The majority of traffic now by-passes the town centre core via the A6 - resulting in the loss of passing trade opportunities for retail and at times an 'empty' and 'lifeless' town centre.
- Pedestrian only areas lead to a lack of legibility for drivers accessing the town centre with routes being re-directed around the pedestrian core; further there is poor north - south connectivity, points of conflict and confusion.
- Pedestrian activity is focused in the northern end of the town centre - no key destinations to draw people down Market street (which would change if the proposed foodstore is brought forward).
- A6 forms a barrier to cross pedestrian movement into the town centre from the train station which is visually disconnected from the rest of the town centre.
- Main arrivals points into the town centre are of poor quality, with no sense of arrival. These include the Flat Iron roundabout which lacks spatial definition, and the Town Hall/ Park Road and Southern Market Street gateways which are dominated by areas of pedestrian and vehicular conflict.
- The A6 forms a barrier to pedestrian movement from the Train Station into the town centre.

9.5 Opportunities: Movement



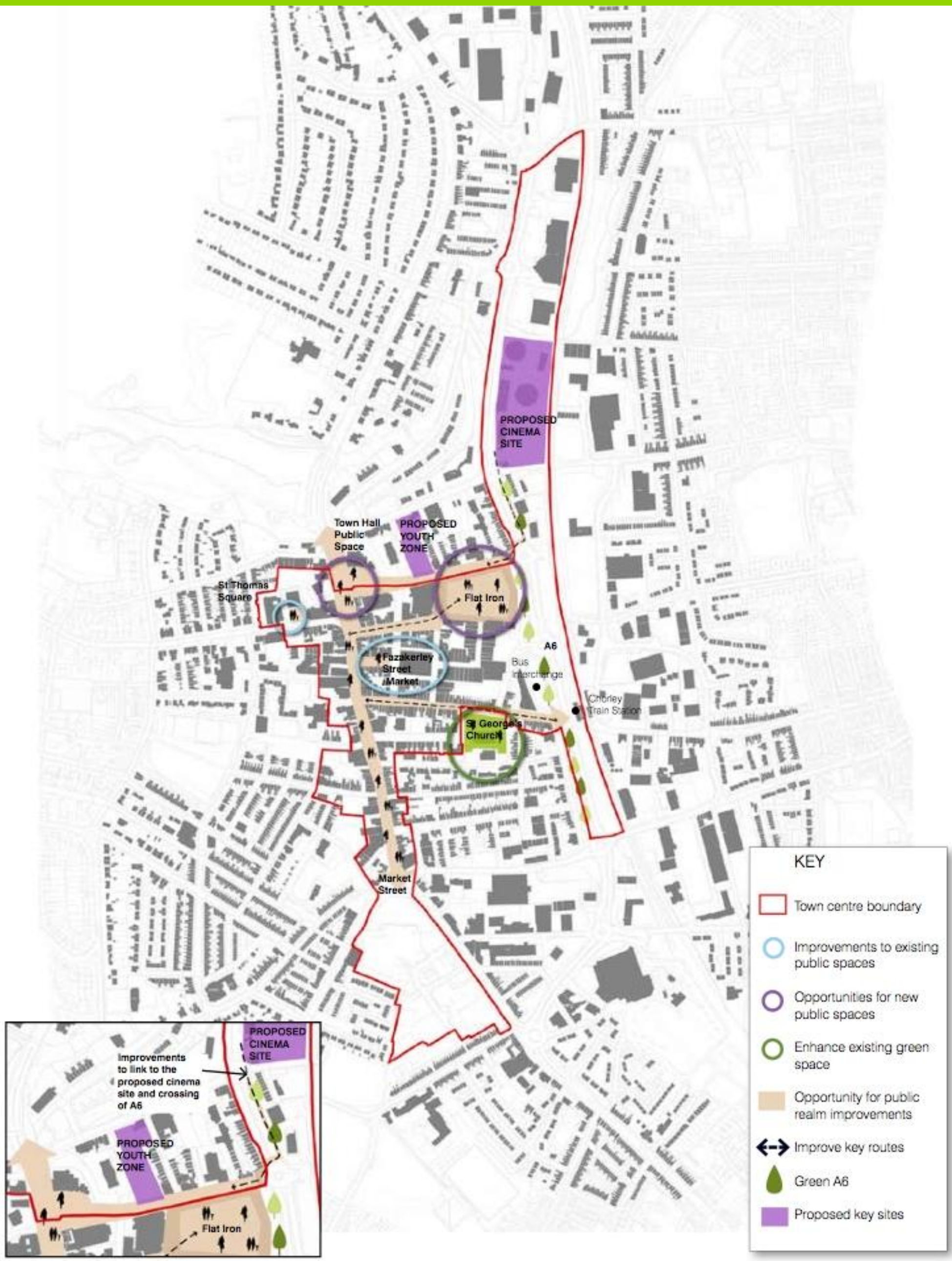
- Introduce a continuous shared surface to Market street:
  - Removes points of conflict;
  - Improves permeability and connectivity North – south.
- Allow controlled vehicular movement through market street:
  - Creating additional vitality and through movement;
  - Opportunities for controlled on street parking to encourage people into the town centre and activate the street.
- On street parking provided could potentially free up council owned car park sites for development.
- Instead of rigidly defined pedestrian/ and vehicle 'zones', the majority town centre to become a pedestrian priority area with some areas with controlled vehicle movement.

9.6 Issues: Public Realm



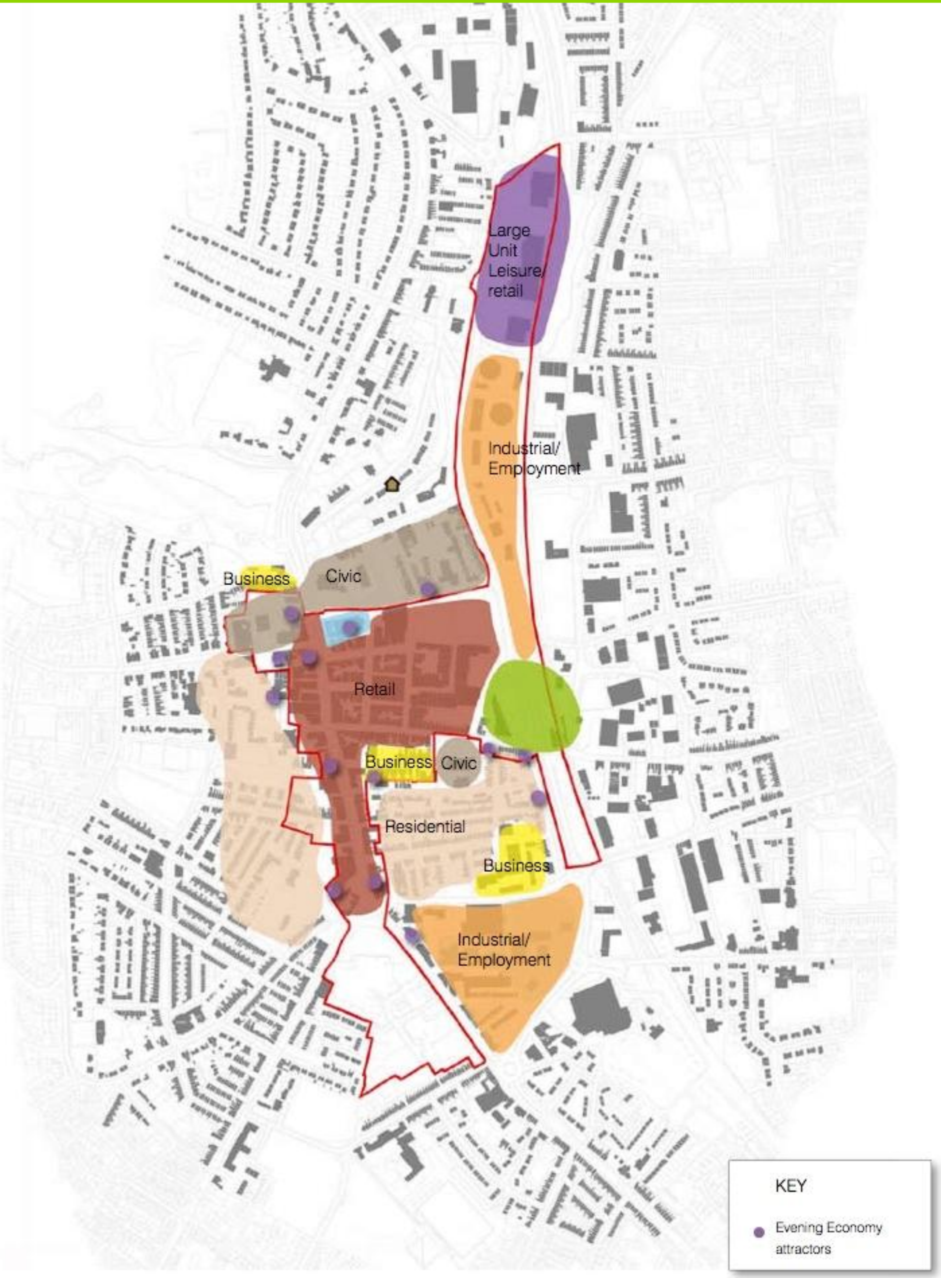
- Areas of poor quality or dated public realm, that do not invite activity.
- Limited evening activity across the town centre.
- Limited and poor quality public spaces and green spaces within the town centre.
- Market street
  - Areas of pedestrian/vehicle conflict;
  - A focus for poor quality frontages and vacant units.
- No spaces for people to 'dwell' - 'Leaky' Public realm – people are not encouraged to stop and use the public realm for additional activities.
- Poor Gateways to the town centre. No sense of arrival into the town.

9.7 Opportunities: Public Realm



- Target public realm improvements along Market street.
  - Shared street - improve the environment for pedestrians.
- Encourage mixed uses along Market Street, including bars, cafes and restaurants by providing an attractive public realm with spill out spaces.
- Opportunities for new public spaces
  - Area around Town Hall
  - Flat Iron Market
  - Enhancing public space around the market hall
- Enhance existing public spaces
  - Fazakerley Street (gateway to the market); and
  - St Thomas Square.
- Promote and enhance St Georges and a key open space destination.
- Public realm improvements to key routes linking destinations, including the proposed cinema site.

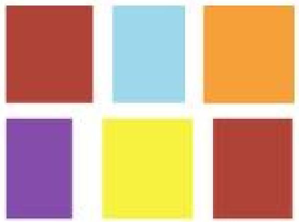
9.8 Issues Land Use



- Town Centre ‘Zone Uses’ too rigid.
- Over Stretched retail - creates vacant units.
- Lack of evening economy and leisure uses within the town centre.

9.9 Opportunities: Land Use

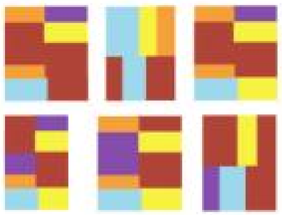
Zonal' Town Centre Plan



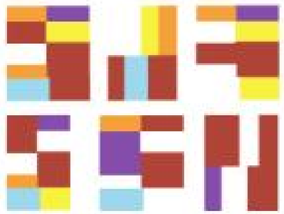
- Land uses concentrated in certain areas
- Limited movement across the town centre from destination to destination

- If one element falls into decline large parts of the town centre effected

Mixed – Use Town Centre Plan

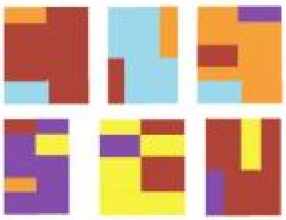


- Encourages footfall across the town centre, multiple destinations
- Promotes a diverse town centre offer - to compete with out of town retail

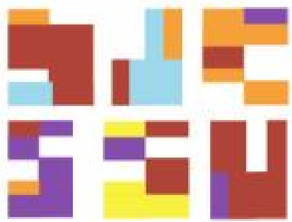


- Robust - If some elements fall into decline the town centre overall still performs.

Potential Chorley Town Centre Solution

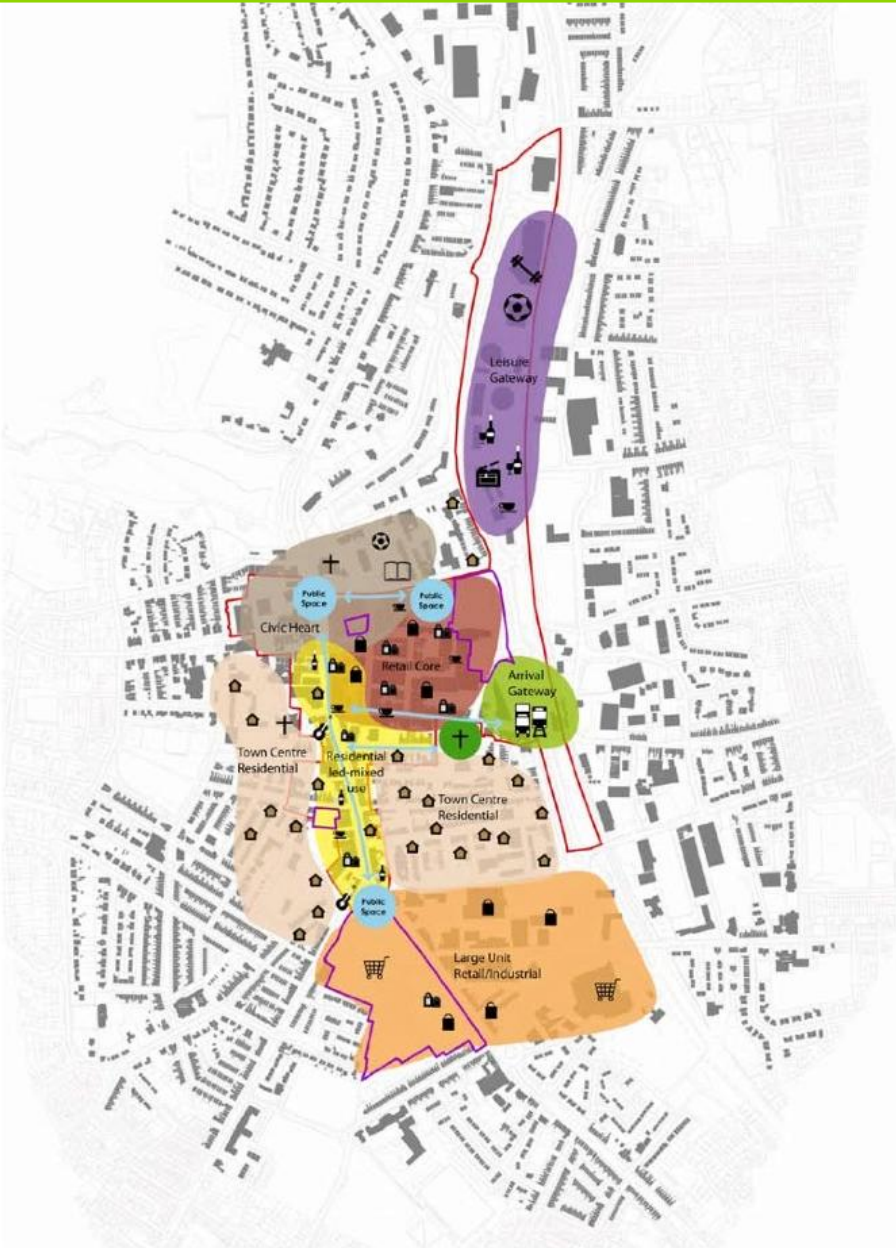


- Introducing some mixed uses into already established land use zones.



- Robust - Can accommodate changes and remain robust.

9.10 Opportunities: Character Areas



Retail Core

- The existing retail heart, where retail anchors such as the Market, Booths and Market Walk are already established, should be strengthened and consolidated within a defined area; potential to provide units of a certain size are limited to Flat Iron – avoiding significant re-development.

- Reduction in the amount of vacant retail units by focusing on achieving a quality retail offer but retaining and strengthening retail circuits, and allow other uses to populate wider vacant units on for example, linking streets to Market Street (achieves a transition) – impacts of changes in changes of use legislation.

- What level of alternative uses are acceptable to encourage vitality without compromising the overall value of the retail core.

Residential Led Mixed Use

- This character area is focused on Market Street. Consolidating high street retail into the retail core will allow the opportunity for other uses to flourish in this character area.

- Introducing opportunities for town centre residential along with the encouragement of small independent retail, bars and cafes; aims to support local business and bring life back to this end of the town centre. The aim is to create an identity around a mix of uses.

9.11 Summary

- A retail anchor (significantly different in offer to that of Market Street and the retail core) at the southern end of Market street will draw people through the 'Market Street Quarter'.
- There is the opportunity for small residential intervention, with the aim of increasing the town centre population. Blending with the adjacent residential zone.
- The urban grain of this area with smaller plots facilitate this new quarter, and encourage smaller independents to establish themselves in the smaller units.
- These aims will be facilitated by public realm improvements to Market Street, encouraging people to spill out of the retail heart and continue their journey down the street in a pleasant pedestrian environment.

Civic Heart

- A focus for civic uses. This quarter will be focused around the key civic and heritage assets; the town hall, St Lawrence's church, and the library, creating a focal public space and signaling arrival into the town centre. Opportunities to diversity use mix within the area to include civic/community hub, residential and supporting leisure uses – activating key space.

Large unit retail/industrial

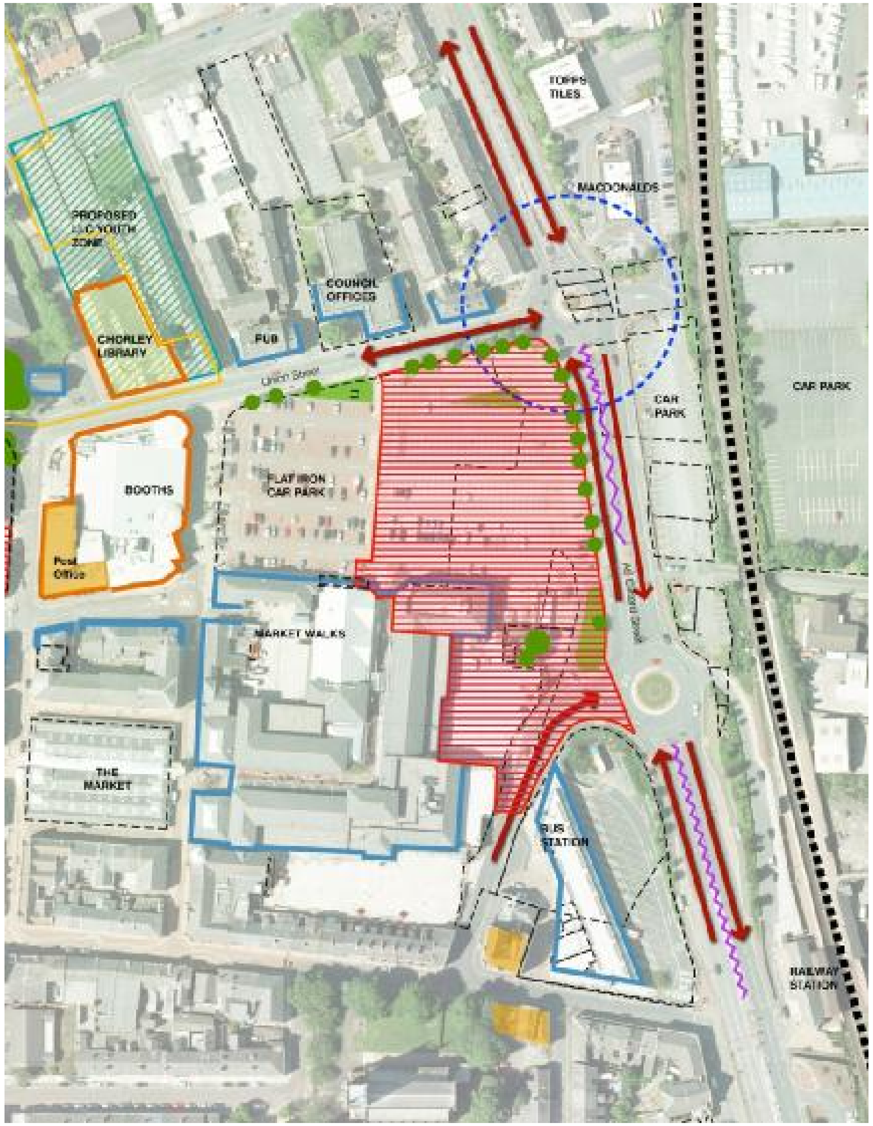
- Reinforce the established 'large unit' retail and industrial uses on the periphery of the town centre, in order to consolidate pedestrian activity in the character areas mentioned above.
- Reinforce pedestrian linkages/permeability.

Leisure Gateway

- Focus on achieving a comprehensive and diverse leisure offer to establish area as a destination. Improve pedestrian links along and across the A6 to the rest of the town centre.
- **Arrival Gateway**
- Improve connectivity across the A6 to the town centre.
- **Town Centre Residential**
- Support existing fringe residential population with possibilities for a mix of ancillary uses and services. Further opportunities for pockets of new residential to fill gap sites.

Opportunity Sites: Analysis

10.0 Site 1



- Primary gateway into Chorley access into town centre from A6 – but gateway lacks definition;
- Proximity to Leisure/cultural assets – Library and proposed youth zone;
- Significant land in council ownership;
- A6 forms barrier to East- West cross movement;
- Proximity to retail assets; and
- Some existing landscape.

Key

Development site 1
Land in Council Ownership

Built Form Quality

Quality building frontage/ Good contribution to street
Medium quality building frontage/ Average contribution to street
Poor quality building frontage/ Poor contribution to street

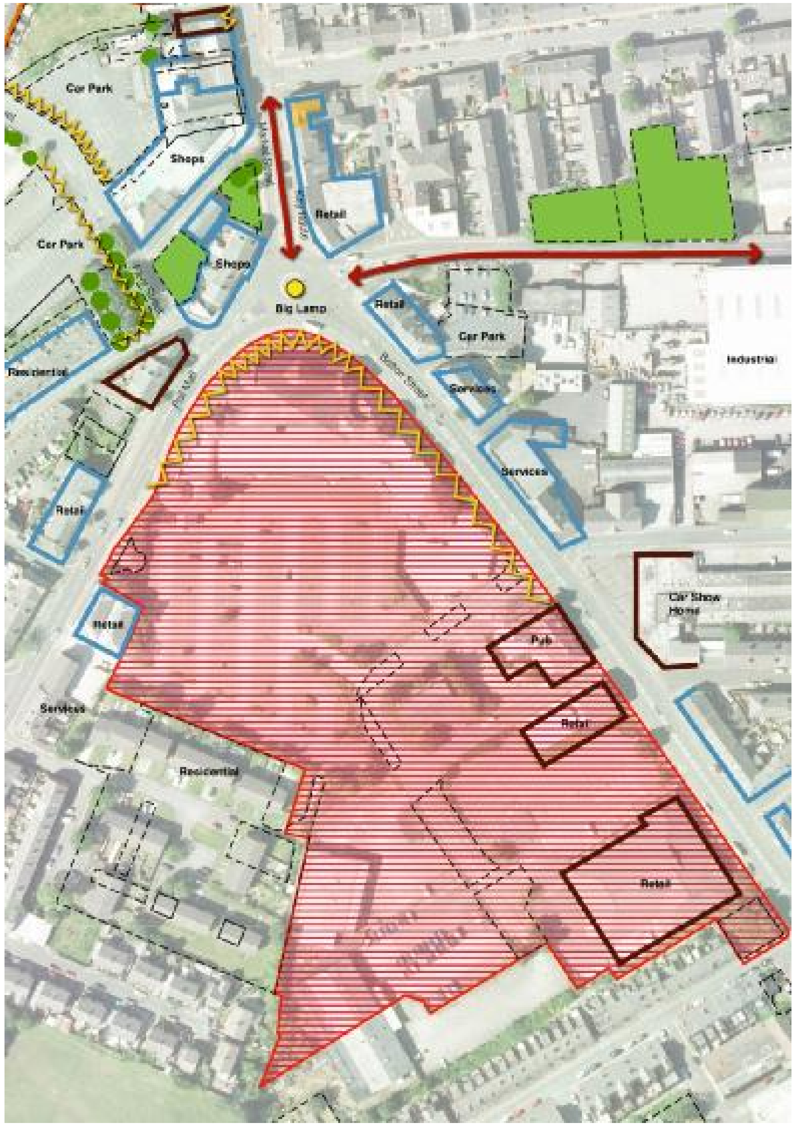
Listed Buildings

Listed Building

Proposed LLC youth Zone
Inactive edges
Changes in level
Trees
Green space
Key route (vehicular and pedestrian)
Railway line
Barrier
Gateway

10.1 Site 2

- Key location at the end of Market Street for another retail anchor to draw people to the southern end of the town centre;
- Poor quality inactive edge to the site at present;
- Surrounding uses include low grade retail, residential and industrial.



Key

Development site 2

Land in Council Ownership

Built Form Quality

Quality building frontage/ Good contribution to street

Medium quality building frontage/ Average contribution to street

Poor quality building frontage/ Poor contribution to street

Listed Buildings

Listed Building

Site with existing planning permission for retail

Inactive edges

Trees

Green space

Key route (Vehicular and pedestrian)

10.2 Site 3

- The site is located just off Market Street a key route
- Currently, the site has inactive edges to the public realm
- Some limited trees and landscape in close proximity
- McDonalds Site on Market street has existing planning permission for retail units.
- Good quality residential buildings for the western edge of the the site.

Key

Development site 3

Land in Council Ownership

Built Form Quality

Quality building frontage/ Good contribution to street

Medium quality building frontage/ Average contribution to street

Poor quality building frontage/ Poor contribution to street

Listed Buildings

Listed Building

Site with existing planning permission for retail

Inactive edges

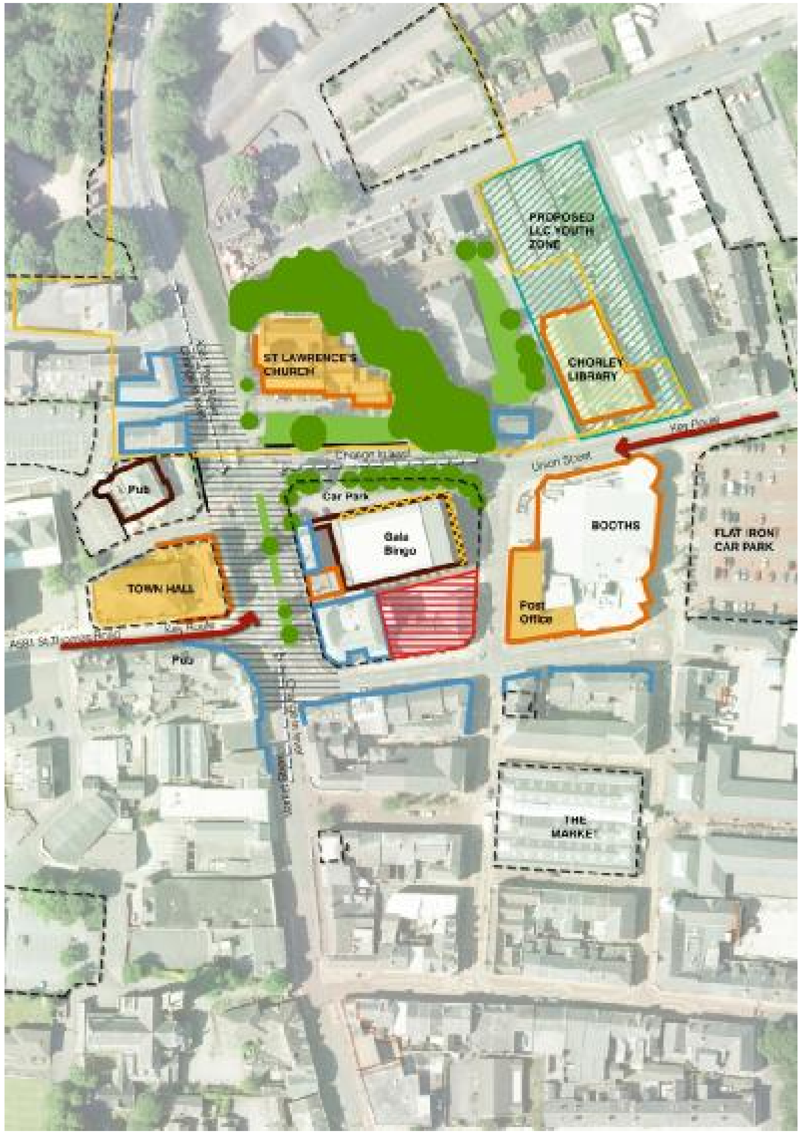
Trees

Green space

Key route (Vehicular and pedestrian)

Change in level

10.3 Site 4



- The site is located in close proximity to several key cultural assets and historic buildings, including the Town Hall, Library, St Lawrence's Church and conversation area.
- The wider urban block is in council ownership.
- Significant areas of trees and landscape.
- A changes in level north-south. High point being at the Town Hall.
- Recent highway works have been undertake to mitigate conflict between pedestrians and vehicles.

Key

Development site 4

Land in Council Ownership

Built Form Quality

Quality building frontage/ Good contribution to street

Medium quality building frontage/ Average contribution to street

Poor quality building frontage/ Poor contribution to street

Listed Buildings

Listed Building

Locally important building

Proposed LLC youth Zone

Inactive edges

Changes in level

Trees

Green space

Wall

Confused traffic arrangement/ area of conflict

Key route (vehicular and pedestrian)

Conservation Area

Real Estate