Appendix 3. Preston City Centre Health Check

PRESTON CITY CENTRE	
ADDRESS (and Zone)	Principally located around Fishergate, Friargate, Church Street (East), Orchard Street, Lancaster Road, Market Street and Lune Street. Zone 1
DESCRIPTION	Preston city centre is focused on Fishergate, Friargate, Church Street (East), Lancaster Road, Market Street and Orchard Street. Preston city centre is the largest centre in the study area (715 retail units) and contains a significant number of national multiple retailers alongside a range of independent operators and the Preston markets. The Business in the Community's Healthy High Streets programme, which ended in 2017, provided intensive support for 100 high streets over a three year period. Preston was included in the July 2015 tranche of the programme. The city is home to UCLAN (University of Central Lancashire), and the seat of Lancashire County Council, and is the largest urban area in Lancashire. Preston gained city status in 2002 and has seen significant investment since this time, including via City Deal and the Preston Guild City projects. Preston city centre is focused on Fishergate, Friargate, Church Street East, Lancaster Road, Market Street and Orchard Street. The city centre has a number of attractions including the Harris Museum & Art Gallery, Preston Guildhall, Preston Market Hall and others. There are also a large number of shopping centres and arcades located within the city centre consisting of: • Fishergate Centre – Spread over three floors and comprising 32 units and approximately 48,586 sq.m of commercial floorspace, the centre contains major national brands, including department stores. Key national multiple retailers include Argos, H Samuel, Debenhams, Primark and Sports Direct alongside leisure operators such as Starbucks and McDonald's. Fishergate is located adjacent to Preston Railway Station, with a car park consisting of 700 spaces at surface level; • St George's Centre – Containing 111 units across approximately 25,120 sq.m of commercial floorspace and with 410 car parking spaces, St George's is the largest shopping mall in the city centre. It offers a range of national comparison brands including H&M, M&S, WHSmith, New Look and River Island and leisure operators such as Subway and Costa. Free WIFI is available throughout the mall. The Fishergate Centre, Miller Arcade and St George's Shopping Centres all have a pedestrian entrance fronting the improved public realm at Fishergate;

	• St John's Centre – a large open and covered mall with 23 units and approximately 3,344 sq.m of commercial floorspace. The centre contains local traders and a variety of discount operators including B&M, Heron Foods and Wilko. It is located between Preston bus station and the market and it is one of the Preston Guild City future projects as a development opportunity for refurbishment; • Miller Arcade – A Grade II Victorian era covered arcade including a variety of period features contributing to the distinctiveness of the shopping environment. Miller Arcade comprises approximately 13 units over 1,450 sq.m of commercial floorspace and contains a range of independent and well established brands, including French Connection, Rohan, The Health Shack, Subway, Baluga Bar and Club, Iceburg, Heavenly Desserts and Olive Tree Brasserie; and • Preston Market Hall – After recently undergoing a multi-million restoration, the market offers a range of convenience goods, gifts and casual dining options. The completed Preston Markets project consists of a brand new contemporary glass enclosure Market Hall, covered by the listed Victorian market canopy. The remainder of space beneath the canopy received new paving and bespoke tables and continues to operate as Outdoor and Secondhand Markets during the day. The flexible nature of this area enables it to be transformed in to an event and performance space in the evenings. A Box Market was created under the smaller adjacent Fish Market Canopy, which accommodates both comparison goods and food and beverage retailers. The City is currently in the midst of a series of major redevelopment and regeneration schemes which are being progressed through the Preston and Lancashire City Deal (signed in September 2013). The deal will see a total of £434m invested to expand transport infrastructure and other projects in the Preston and South Ribble area to help create 20,000 new jobs and 17,000 new homes. Within the city centre itself, the funding is set to help deliver: • Preston's Harris Quarter; • Modifications to Preston railway station in advance of HS2s arrival; • Refurbishment of Preston Bus Station; and • Various public realm improvements.

	In addition to the above schemes, UCLAN, located on the northwest fringes of the City Centre, is also undergoing a £200m development programme creating new and expanding existing facilities in order to accommodate increased student numbers.
CURRENT DESIGNATION	City Centre

DIVERSITY OF USES	No.	COMMUNITY FACILITIES	TOTAL: 14
Convenience	56	Preston Town Hall, Preston Magistrates Court, Harris Museum & Art Gallery, Harris Library, St John Minster, St Wilfred's Church, Preston Train Station, Preston Bus Station, Dental Surgery (2), Lune Street Methodist Church, Central Methodist Church, Doctors surgery, Preston City Mission	
Comparison	202	**NATIONAL OPERATORS**	**TOTAL: 146**
Retail Service	73	Greggs, Greenhalghs, Thorntons, Patisserie Valerie, Sainsbury's Local , Tesco Express, B&M Bargains, Holland & Barrett, Timpsons, Aldi, Waterstones, Argos, Boots, H&M, Primark, French Connection, T K Maxx, Swarovski, Debenhams, Marks & Spencer, Wilko, T J Hughes, Laura Ashley, Clarks, Office, Foot Asylum, Clintons, H Samuel, Warren James, Ernest Jones, Pandora, Thomas Sabo, Next, River Island, Fat Face, New Look, JD Sports, Topshop, Anne Summers, Accessorize, Quiz, Miss Selfridge, Bon Marche, Topman, Slaters, Moss, HMV, W H Smith, Waterstones, , Ryman, Foot Locker, Sports Direct, Jessops, Carphone Warehouse, Vodafone, Virgin Media, EE, Three, O2, Lush, Bodycare, Body Shop, Superdrug, Game, Games Workshop, Toni & Guy, Specsavers, Vision Express, Post Office, Max Spielmann, Tui, Thomas Cook, Kwik Fit, Starbucks, Costa, Café Nero, William Hill, Coral, Ladbrokes, Betfred, Subway, Wetherspoons, KFC, Burger King, Krispy Kreme, Mcdonalds, Premier Inn, Holiday Inn, Yates, Nandos, Yorkshire Building Society, Skipton Building Society, Nationwide, Slater & Gordon, Martin & Co, Reeds Rain, Farrell Heyworth, Bridgfords, The Money Shop, Lloyds, Yorkshire Bank, Virgin Money, HSBC, Santander, RBS, TSB, Natwest, Barclays, Halifax, Co-operative Bank.	
Leisure Service	189		
Financial & Business Services	53		
Vacant Under alteration	105 37		
Total No. of Uses	715		

PICTURES

View of Flag Market, Cenotaph and the Harris Museum

View south along Friargate

View east along Fishergate

View on Church Street (East)

COMMENTS

RETAILER/ LEISURE REPRESENTATION

Preston has a strong national retailer representation, with 146 different national brands having a presence in the city centre. Most of the national level retailers are concentrated along Fishergate and Friargate and also inside the Fishergate Centre and St George Centre.

Preston also has several units occupied by regional level traders (13), of which most are firms such as estate agents, betting shops and eateries. The remainder of units are occupied by local or independent traders. In terms of unit proportions, Table 1 below summarises proportions of each unit type against the total number of units in Preston and also against national figures. We provide detailed commentary on the proportion of units on the next page of the healthcheck.

Table 1: Diversity of Uses (Proportion of Units)

	No. of units	% of units		UK average
Convenience	56	7.8%		9.0%
Comparison	202	28.3%		30.6%
Retail Service	73	10.2%		14.6%
Leisure Service	189	26.4%		24.1%
Financial & Business Service	53	7.4%		10.2%
Vacant	105	14.7%	19.9%	11.3%
Under Alteration	37	5.2%		
Total	**715**	**100%**		**100%**

Source: Experian Goad Survey of Preston city centre, WYG Survey July 2018
* Recategorised by WYG with Experian Goad Main Town Centre Uses
* UK Average Figures, Experian Goad, June 2018

In addition to the unit proportions, we have also assessed the amount of floorspace per unit type in Preston city centre and assessed this against national level figures, these are summarised in Table 2 below.

Table 2: Diversity of Uses (Proportion of Floorspace)

	Floorspace amount (sq.m)	Floorspace %		UK average
Convenience	11,670	6.9%		15.2%
Comparison	68,170	40.1%		34.6%
Retail Service	7,590	4.5%		6.9%
Leisure Service	37,490	22.0%		25.1%
Financial & Business Service	10,090	5.9%		7.6%
Vacant	22,350	13.1%	20.6%	9.9%
Under Alteration	12,790	7.5%		
Total	**170,150**	**100%**		**100%**

Source: Experian Goad Survey of Preston city centre, WYG Survey July 2018
* Recategorised by WYG with Experian Goad Main Town Centre Uses
* UK Average Figures, Experian Goad, June 2018

Preston's proportion of convenience units (7.8%) is lower than the national average (9.0%). Preston's convenience retail offer includes a variety of convenience unit types, including; bakers (11), newsagents (10), tobacconists (9), convenience stores (8), health food stores (5) and confectioners (3). The convenience offer also includes a medium sized Aldi foodstore on Ringway which is contained within the Goad survey boundary, the recently renovated Preston Market Hall and the Outdoor Market. Whilst the Outdoor Market was observed as being in use during the survey, due to the flexible nature of outdoor markets and limitations with the GOAD system, we were unable to accurately record the uses within our unit and floorspace counts. However, we do consider its presence to make a significant contribution to Preston's convenience trade. Preston's proportion of convenience floorspace (6.9%) is also lower than national averages (15.2%). The absence of a large format "big four" convenience retailer could contribute to this discrepancy, although as we detail in the Study, this will be dictated by the commercial market.

The proportion of comparison units in Preston (28.3%) is slightly lower than the national average (30.6%). Despite this, the amount of comparison floorspace in Preston (40.1%) is notably higher than the national average (34.6%). Comparison units make up the largest single retail unit class in Preston (202 units) and comprise of the following; clothing (56), jewellers (23), charity Shops (15), mobile telephone stores (13), household goods (12), footwear (8), health & beauty stores (8), cards (5) and others. Preston is also host to major department stores including Marks & Spencer, Debenhams and T J Hughes. Other major comparison retailers present include Wilkos, B&M, H&M, Primark, T K Maxx, Argos, Boots, New Look and Next. A number of these operators occupy units above 1,000 sq.m, including Argos (2,700 sq.m (gross)), Boots (1,400 sq.m (gross)), H&M (1,720 sq.m (gross)), Primark (1,680 sq.m (gross)) and TK Maxx (2,260 sq.m (gross)) to name but a few. This would account for the higher proportion of comparison floorspace compared to the proportion of units occupied by comparison operators. The total number of commercial units measuring over 1,000 sq.m in the city centre is 39, accounting for 5.5% of the total number of units in the centre. Of the 39 units measuring over 1,000 sq.m, 17 are occupied by comparison retailers, which equates to 2.4% of the total number of units in the city centre.

It was noted that comparison units were generally located in the western section of the centre in either the shopping centres (Fishergate and St George's Centre) and along Fishergate or Friargate – this was especially true of the larger / national comparison retailer units.

Retail services in Preston occupied 10.2% of the observed units, which is lower than the national average of 14.6%. In terms of more specific uses, the retail service composition of Preston included hairdressers (33), tattooists (6), travel agents (6), opticians (5), beauty salons (5), a Post Office and others. Retail services tended to occupy smaller units than other retail unit types in the centre. In terms of their location and distribution, retail services were generally located down more secondary streets and / or on the fringes of the centre, with notable clusters observed on Cannon Street and on the northern section of Friargate. The national multiplies which are categorised as retail service units tended to be located on the main streets of Fishergate and Friargate.

The number of leisure service units in Preston (189) equated to a higher than national average proportion (26.4% in Preston compared to 24.1% nationally). However, the amount of leisure service floorspace in Preston (22.0%), is lower than national averages (25.1%). Leisure services made up the second highest number of retail units in the centre and include the following: Takeaways (50), restaurants (29), pubs (28), cafes (19), bars (19), coffee shop (12), nightclubs (7) and others. Leisure services were located throughout the centre but there were some observations noted about specific leisure service types:

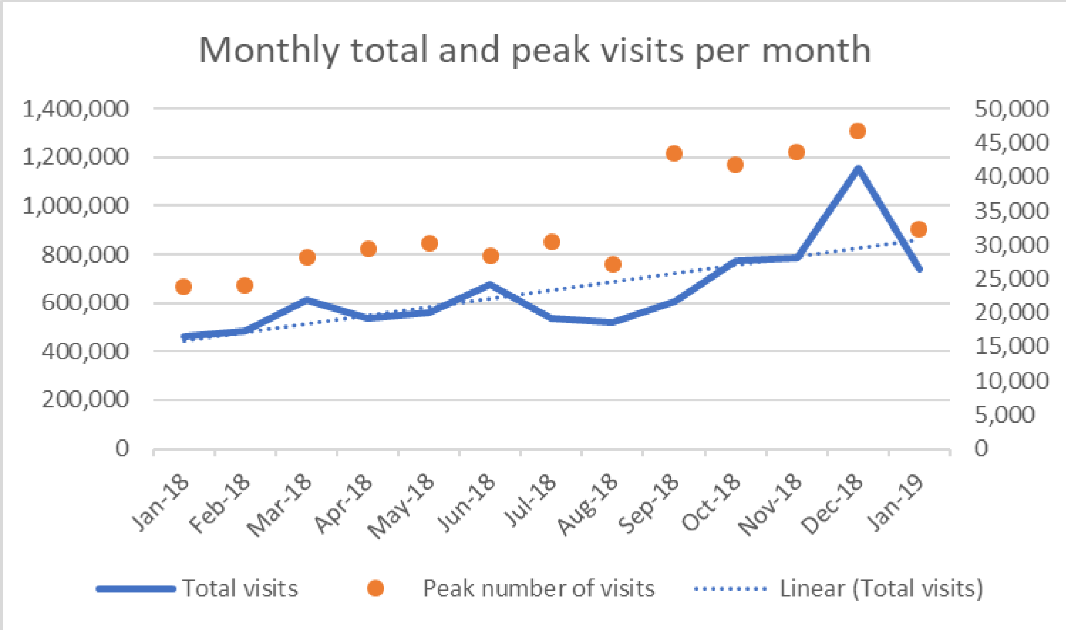
- Cafes and restaurants were generally concentrated in the south west part of the centre and along the main streets of Fishergate and Friargate, with restaurants more likely to be located on Fishergate and cafes along the streets south of Fishergate;
- Nightclubs were generally located in the east part of the centre along Church Street (East), along with some hot food takeaways;
- A number of hot food takeaways were located along the north section of Friargate, leading up to the UCLAN campus; and
- Generally, national multiple leisure service uses (irrespective of their more specific type) were located on the main streets of Fishergate and Friargate.

The amount of financial and business service units in Preston (7.4%) was recorded as being lower than the national average (10.2%), the same was observed with regards to the amount of floorspace (5.9% in Preston to 7.6% nationally). Most financial and business service units were located on Fishergate and the streets off Fishergate. Of the 53 financial and business service units observed; 19 were retail banks and building societies, 13 were estate agents and 7 were employment / recruitment agencies. Pawnbrokers, reprographic / printing services and bureau de changes were also observed.

A search conducted on the Requirementlist.com in January 2019 has found that a series of national chains are looking to open premises in Preston, principally concentrated in the leisure sector, including; Subway, Creams Café, Snap Fitness, Metrobank, Taco Bell, Amber

	Taverns and Bix Box Company. These operators are seeking units ranging from approximately 130sq.m (Creams Café) to 9,290 sq.m (Big Box Company).
PEDESTRIAN ACTIVITY	The strongest pedestrian flows were noted along Fishergate, Friargate and Orchard Street. The Fishergate and St George's Centre were also noted as having a significant amount of pedestrian footfall, with more noted at St George's possibly due to it being a link between Fishergate and Friargate. There was also a significant amount of pedestrian activity around and inside the new Market Hall. St John's Centre was considered to have a large amount of footfall, however it was observed this was principally a result of people using the centre as a short cut to the bus station. Of all the shopping centres, Miller Arcade was considered to have the least footfall within the city centre. Streets to the south of Fishergate and along Church Street (East) had markedly less footfall than other areas of the city centre – a fact which may explain, or be a contributing factor towards, the concentration and amount of vacant units being in these areas. Strong pedestrian flows were also noted in the vicinity of the bus station and along the upper part of Friargate towards UCLAN. Lancaster Road, despite being a major axis route which transects the city centre had restricted flows traversing the alignment with more people crossing it from east to west – this is most likely people going to and from the bus station. The area to the south of Winkley Square did not have any significant pedestrian activity – this area, along with the areas to the south of Cross and Syke Street were primarily residential in character. With regard to pedestrian flow, significant activity is connected with the bus station (in the City Centre North Opportunity Area: City Centre Plan Policy OP3), the railway station and St George's Shopping Centre. Footfall is also concentrated in the City Centre North Opportunity Area at the Flag Market and the adjacent Harris Museum, Library and Art Gallery, which receives almost 1000 daily[1] visits. Visitor numbers to Queens Retail Park, in the Horrocks Quarter in the east of the city centre, increased by 24% in a period of 12 months as reported by Place North West [2]. With regard to the overall number of visitors to the centre, the Preston BiD has been collecting footfall data on a monthly basis and includes the total amount of visits to the centre for the month and the peak amount of visits per month – the data is summarised in the graph below:

[1] http://www.harrismuseum.org.uk/about-us
[2] https://www.placenorthwest.co.uk/news/queens-central-brings-three-retailers-to-preston/ dated 8th June 2018

	 The data indicates that December 2018 was the busiest month overall, with approximately 1.16 million visitors recorded, December 2018 also had the single busiest day of the year, with 46,651 recorded visitors. The quietest month was January 2018 with approximately 460,000 visitors. There was a decrease in footfall during the summer months, this is possibly due to the academic cycles of the nearby Cardinal Newman College and UCLan. Throughout the year, we observe an upwards trend regarding the total number of visitors per month.
VACANCY RATES	The survey of uses in the city centre demonstrates that 19.9% of all units in the centre were vacant, which is significantly higher than the national average of 11.3%. In terms of floorspace, this equates to 12.5% of all retail floorspace in the centre, nationally, the average amount of vacant floorspace is 20.6%. Therefore, Preston has higher than average vacancy rates compared to the national figures in terms of both the proportion of units and floorspace. In 2010, the proportion of floorspace in Preston city centre was recorded as being 22.2% and the proportion of units recorded as being vacant was 15.0%. These figures remained consistent for the total floorspace by 2013 at 22.2% but the number of vacant units increased to 23.7%. In addition, from the Council's last retail study (published May 2013), there have been a number of major store closures in the City Centre, including; Mothercare, BHS, Poundworld, Shoemarket (budget footwear store located in the Market area), Peacocks, Wyndsors, Evans, Poundworld in St George's and Wyndsors world of Shoes. Whilst vacant units were observed throughout the centre, marked concentrations were

	observed along Church Street (East), down the streets to the south of Fishergate and around areas where a significant amount of works were or had recently been undertaken, such as the Market Hall area. There were also a number of vacant units observed within the Guildhall and in the St John's Centre. It is important to note that 'vacant units' within the Goad classifications also incorporates units which are currently undergoing alterations or renovations. Given there are several areas within the centre which are subject to regeneration schemes, and a number of units were observed as having physical works being undertaken on them, it is useful to subdivide the vacancy proportions to show which ones are undergoing alteration or a change of use. We have calculated that 5.2% of the total number of retail units and 7.5% of the centre's retail floorspace is currently undergoing alterations or is subject to a regeneration scheme (such as the new Market Quarter and Guildhall). Whilst this would shift the centre's number of vacant units to 14.2% and vacant floorspace proportion to 12.3%, this is still higher than national averages, albeit substantially lower. The figures demonstrate the importance of the regeneration and refurbishment schemes within the city centre and how these will contribute to improving the overall vitality and viability of the centre. The current vacant units (excluding the market hall) range in floorspace from 20 sq.m to 2,710 sq.m (the former Cinema building on Church Street). The majority of vacant units are less than 100 sq.m in size. Looking more in depth at the vacant units, the former BHS store on Fishergate has been vacant for in excess of two years following the chain going into administration, however we understand that an application has been submitted to convert the first floor of the unit into a buffet restaurant (application still pending at the time of the Study). It is also understood the former cinema on Church Street has been vacant for a significant amount of time and although there are plans in the pipeline to regenerate the site, no formal plans have yet to be submitted. The type and scale of vacant units within the city centre varies considerably, with just 9.4% of the vacant units measuring over 500 sq.m, but a substantial 71.2% of the vacant units measure less than 200 sq.m. These proportions indicate that a substantial number of the vacant units are small in nature, relating back to the fact that the proportion of vacant units exceeds the proportion of vacant floorspace within the city centre. In addition to the range of vacant units identified above, the largest vacant unit identified is

	the former market hall, which forms part of the key regeneration scheme within the city centre to bring forward a mixed-use commercial scheme anchored by a cinema and food and beverage units. Alongside the former market hall are units fronting Friargate which form part of the St. Georges Shopping Centre, which are proposed to be redeveloped into fresh, modern format units with substantially improved frontages. Indeed, of the vacant units, 14.4% are located within St George's Shopping Centre. The cinema and restaurants complex scheme has been designed to enable the restaurants to spill out on to a lively new square abutting the new market hall and from which the cinema will also be accessed. A new secure, 250 space, multi-storey replacement car park will be provided at basement level. Public realm improvements also form part of the scheme. <u>Regeneration and major development schemes</u> It is important to note that there are a number of major regeneration schemes which are either planned or are already underway, some of which incorporate areas where vacant units were noted and concentrated. A summary of the key schemes are set out below (including the markets quarter which we refer to above): • Markets Quarter – With the first phase completed by the opening of the old Market Hall, the remainder of the development is to include an 11-screen cinema, seven restaurant / café units, an A1 retail unit, a new multi storey car park (615 spaces) and new public realm. It is understood that the second phase will commence in 2019 through the demolition of the indoor market, within which the façade of the existing Lancastria House will be retained. The indoor market is gradually becoming vacant with existing traders moving into the new covered market hall. • Stoneygate – In 2018, Preston City Council appointed Nexus planning consultants to work alongside Buttress Architects, Gillespies, Colliers, and WSP to work up a masterplan for an "urban village" in the Stoneygate area of the city. The area covers Stoneygate, Church Street, Queens Retail Park and Cardinal Newman College. The regeneration of the area will focus on brownfield and "under-used" sites which will be brought forward for a variety of residential, business, education, and leisure projects. • Bus Station – The Listed building renovations have recently been completed although the landscaping works around the west of the bus station are yet to be fully implemented. Proposals for a youth zone were originally proposed but these

	have now since been removed from the scheme. • Guildhall – Following its purchase in 2014, the Guildhall has seen significant redevelopment already with the opening of the Levels entertainment venue, which includes 10-pin bowling, crazy golf, lazer quest and gaming areas. A restaurant has been provided at ground floor. Further aspects are planned for the Guildhall but details are unknown at this stage.
ACCESSIBILITY	Preston city centre is well connected nationally, regionally and locally by the strategic highways network and public transport connections with Preston bus station (recently renovated as part of a two-year programme) on the eastern edge of the city centre and Preston railway station located on the western edge. In terms of service provision, the train station has direct services to London Euston (2 trains per hour (tph)), Manchester (1 tph to Victoria and 3 tph to Manchester Piccadilly, with some of these trains serving Chorley and Leyland), Blackpool North (4 tph), Edinburgh, Glasgow, Liverpool and Leeds (all 1 tph). Bus services serve the local destinations within Preston and the wider regional and sub-regional area towards Blackburn, Burnley, Southport, Chorley, Liverpool, Leyland and Fleetwood. Parking provision in Preston is distributed around the vicinity of the railway station (939 spaces multi-storey car park), the Fishergate Centre (700 spaces) surface car park and St George's Shopping Centre (410 spaces). There are three City or County Council controlled multi-storey car parks in the city centre, two of which – the bus station (1,169 spaces) and market car parks (508 spaces) – are included in the City Centre North Opportunity Area. WYG are aware that a 250 space, multi-storey replacement car park is proposed in the northern area as part of the Market Place redevelopment. A Preston Parking Strategy (Stage 1) was produced by AECOM in January 2013. During the survey, it was noted that the Fishergate Centre, Avenham Street (560 spaces), Hill Street and Bolton Court car parks were particularly well used. The City Centre AAP highlights that the current scale and distribution of car parking within the city centre more than meets demand. However, the 2013 car parking strategy identifies quality as an issue at many Council controlled facilities, especially the multi-storey car parks, with ageing payment machines, poor levels of lighting and cleanliness, and a clear difference in quality when compared to the privately owned stock. These quality issues could also affect perceptions of crime and safety in these locations. It is important to note that the Bus Station car park has now also been renovated, providing an improved internal layout, safe and improved access and increasing the perception of safety throughout. Significant areas of the city centre are pedestrianised (Friargate, Orchard Street) allowing

	for easy access for less able users and the free flow of pedestrians around the centre, however there is a noticeable difference between the quality and condition of pathways between the western half (centring along the south part of Friargate and all of Fishergate) of the centre notably higher quality and newer, and eastern half of the city centre which is dated. The area to the west of the bus station and north of the Market Hall was not as legible as other areas of the city, with poor signage and narrow pathways. The pedestrian subway which traverses underneath Ringway to the Magistrates Court was of notable poor quality and showed signs of minimal use. The southern areas of the city centre were considered as being walkable and accessible, however it was noted that some of the pavements were narrow and this was exacerbated by cars parked along the street. There was significantly more on street parking observed in this section, primarily due to it being a residential area. Cycle storage areas were observed throughout the centre, particularly around the Fishergate and Friargate area. No dedicated cycle lanes were observed within the centre but a review on the Sustrans website has found there to be two national cycle routes, numbers 6 and 62, which traverse the city centre in a north-south direction linking it with outlying areas of Preston and other towns and villages in the vicinity. It also links with the Preston Guild Wheel orbital cycle route (Sustrans route 622). As was recognised in the City Centre AAP, Ringway is a key traffic corridor through the city centre and a major pedestrian barrier which separates the northern part of the city centre from the core of the primary shopping area. We agree with the aspirations of the City Centre AAP, that It is essential that Ringway strikes a better balance between acting effectively as an important highway and facilitating pedestrian and cycling movement into the primary shopping area. We note that public realm improvements have been completed at some of the crossings across Ringway, and that further improvements are planned in the future as funding becomes available.
ENVIRONMENTAL QUALITY	Preston's environmental quality is considered to be mixed. There is a clear east to west divide in terms of the location of vacant units, pedestrian flow rates and environmental quality, with the eastern part of the centre generally having higher concentrations of vacant units, poorer environmental and building quality and less pedestrian activity than the west. The area around the train station and Fishergate are of a high standard and include

	aesthetically pleasant street scenes including low accessible kerbs, hanging baskets on shop frontages, benches, cycle storage, large street vegetation planters and landscaping. This street scene extends from the station up to St John's Minster. The Fishergate Central Gateway Project (Phases 1 and 2) has improved the pedestrian environment and the public realm in the area. Along Church Street (East), the environmental quality declines with further distance eastwards from St Johns Minster with multiple vacant units facing onto the street, several of which are in a poor and dilapidated condition which detract from the streets visual amenity. Despite this decline in quality, we are aware that there are several Listed Buildings within this particular area therefore the options for addressing the issues surrounding the areas environmental quality may not be as straightforward as other part so the city centre as a result of this. Stoneygate is the subject of an emerging Masterplan that may have scope to improve the environmental quality of this area. The streets branching to the south of Fishergate, leading to Winkley Square Gardens, were of good quality. Indeed, Winkley Street was considered to be of higher quality than other streets to the South of Fishergate as it included benches, landscaping and the cobbled road improved its visual amenity due to its uniqueness in this particular area. Canon Street was also noted as being of particularly good environmental quality. Winkley Square Gardens itself has recently been awarded Green Flag status. The area around the Harris Gallery, (including Harris Street, Cheapside and Lancaster Road) was also considered to be of high environmental quality. During the time of survey, the Flag Market to the front of the Harris Gallery was being used as a small-scale market and event space which was attracting pedestrians and footfall. The area was clean, well kept and had ample formal and informal seating for users. Improvements to the streets and pavements were occurring around the Guildhall at the time of the assessment which once complete, will improve its quality. The new Market Hall, to the north of the square, was also considered to be of a high and positive quality, however the presence of the old market hall, currently under demolition, did detract and negatively impact on the area's visual amenity. It is note that this is a short-term issue and will substantially improve once the market has been demolished and phase two of the scheme implemented. Friargate was considered to be a good environmental quality but there was a divide between the areas north and south of Ringway. From the cenotaph to Ringway, Friargate is pedestrianised with benches, trees and the buildings were also of a good quality. The clear view from Ringway to the Harris Gallery makes a positive contribution to the street's visual amenity. On the other side of Ringway, Friargate's quality is not as positive, did include

	seating, hanging baskets and good quality paving. This stretch is a main arterial route linking the centre to UCLAN's main campus and is open to both pedestrian and vehicular traffic. The pedestrian subway which traverses underneath Ringway to the Magistrates Court, and the area on the north western fringe of the centre along Ringway, was of notably poor quality and showed signs of anti-social behaviour and crime. The Fishergate Centre was considered as having a positive environmental quality, the interior was well maintained and clean, had high quality finishes and visual amenity and also showed no signs of degradation. Similar conclusions were reached regarding the St George's Shopping Centre. St John's Centre was considered to be of poorer environmental quality than Preston's other shopping centres and arcades, with parts of the interior not being particularly well lit and being more dated aesthetically. The Tithebarn Street elevation was considered to be of medium visual quality and requiring some maintenance and in need of improvements. Miller Arcade was considered to be of high environmental, and architectural quality. The arcade is Grade II listed and appears to have been well maintained and retains its original features. The interior was well lit, clean and contained areas of seating. Winkley Square is a large sized park located to the south of Fishergate. Whilst not considered to be part of the retail core of the town centre, it does provide recreational space for users. The square, and the buildings fronting onto it, are considered to be of high environmental quality. The areas to the east of Winkley Square and south of Cross Street were characterised by cobbled roads with mature trees dispersed along the street and Victorian era terraced housing – this area was mostly residential. As part of the Townscape Heritage Initiative (THI) to refurbish key buildings around Winckley Square and nearby streets, Preston City Council secured funding from the Heritage Lottery Fund (HLF). The restoration of Winckley Square Gardens recently completed and the environmental quality at Cannon Street has recently benefitted from street surface reinstatement as part of the Winckley Square THI. The public realm in the eastern half of the city centre will be improved in part by the Fishergate Phase 3 proposed public realm works, which are programmed to commence in January 2019, running through to summer 2019. This Phase 3 stage includes sections of Lancaster Road, Jackson Street, Lord Street and a section of Tithebarn Street. It links to

	the previous improvement work on Fishergate and Church Street, and will be done in a similar style. The city centre also contains the Winkley Square Conservation Area and the Market Place Conservation Area, both of which contain a number of Listed buildings. The Harris Gallery the Cenotaph in Market Square are both Grade I Listed Buildings, there are also several Grade II* Listed Buildings in the city centre which do add to the visual amenity and quality of their immediate surroundings. Parts of the city centre also fall within the Avenham Conservation Area (located to the south) and the Fishergate Hill Conservation Area (to the west). Winkley Square has recently undergone a restoration project which included the refurbishment of hard landscaping and shop frontages. We also note a significant cluster of Listed Buildings in the streets north and south of Avenham Lane. As part of the household survey, residents were asked what the main reason was for visiting Preston city centre and also whether there were any measures which would encourage them to visit the centres more. In terms of the main reason to visit the centre, 1.6% confirmed this was due to the environmental quality of centre and 1.4% confirmed this was due to the city centre having a good layout. When asked what measures would encourage them to visit the centre more, 2.1% confirmed an improved environment would, 1.9% confirmed better street cleaning would and 1.4% confirmed that better pavements would. The proportion of respondents referring to the environmental quality in Preston city centre as a reason to increase the number of trips was relatively low overall, demonstrating that residents generally feel satisfied with the quality.
PERCEPTION OF SAFETY	We are aware that Preston has recently been awarded the purple flag accreditation from the Association of Town and City Centre Management, which recognises Preston's leisure and night time economy as being safe, vibrant and well managed. The majority of the retail units observed in the centre had active frontages – this was particularly prevalent along Fishergate, Friargate and around the new Market Hall. CCTV towers and units were present within the streets, more notably around Fishergate, Friargate, the Bus Station, Train Station and new Market Hall. Private security were present in both the Fishergate and St George's Centres. There seemingly was an absence or significantly less safety measures noticed in the eastern segments of the city centre and along the streets to the south of Fishergate. The streetscene seemingly had sufficient lamp post and lighting arrangements to ensure they were well lit at night time. It is understood though that in some areas in the eastern section, private security often man the doors, particularly at the larger night time venues.

	Using data from the Lancashire Constabulary collected in October 2018, looking at the number of crimes, in the year ranging from 1st April 2017 to 31st March 2018, 3,067 offences were reported in the City Centre, nearly 50% of which were classed as 'other acquisitive offences' (shoplifting, pickpocketing etc). There were also 1,712 reported offences of anti-social behaviour in the City Centre – these are counted separate from the crime counts. A recent study undertaken by Preston BiD of 509 people found that the majority of people (approximately 84%) felt safe visiting the city centre and approximately 55% of people agreed that Preston feels safe and secure. However, whilst there is a good provision of uses supporting the night time economy which ensures there is activity in the city centre in the evening, there is a generally low proportion of residential uses within the city, reducing the level of activity in the evening from residents passing through the city centre.
VIEWS AND BEHAVIOUR	A household survey was conducted to gather qualitative information and data on residents within the study area on how they use and interact with the centres. In the case of Preston, 67.71% of respondents stated they visited the City Centre. 33.30% of people stating they visited Chorley and 20.00% stating they visited neither of the centres. Out of those who stated they visited both centres; 70.86% of respondents stated they visited Preston more often, with the remaining 29.14% stating they visited Chorley more often. In terms of the frequency of their visit; 5.34% visited daily, 9.17% visited at least twice a week, 15.67% visited once a week, 14.54% visited fortnightly, 22.30% visited monthly, 12.34% visited at least once every two months, 8.53% every three months, 5.68% visited at least every six months and 4.10% either could not answer or that their frequency varied. Regarding the purpose behind their visit to Preston City Centre, the most popular reason was due to the range of shops present (40.52%). The next most popular reason was that there was no particular reason (14.72%), followed by the centre being close to home (12.24%) and then due to the choice of leisure facilities (4.66%). The respondents who stated they did not visit either Preston or Chorley were asked why they do not visit the City Centre. The most popular answer was respondents felt they had no reason to visit (33.49%), this was followed by the centre being too far from home (15.29%, the centre being difficult to get to (6.68%) and also there not being enough

	parking (6.36%). Respondents were also assed what improvements they felt could be made to Preston City Centre. The most popular suggestion was to increase the choice and range of shops (10.40%), followed by having cheaper parking (8.83%). Other suggested improvements were to increase the amount of parking (7.98%) and improve the quality of the shops (7.06%).
RENTS AND YIELDS	At end 2017, agent sources estimated prime rents in Preston at £95 psf Zone A. This represents no change on the mid 2017 level of prime rents in the city with rents remaining 34.5% below the pre-recession peak of £145 psf ZA. On average, prime rents across the PROMIS 200 Towns remain 27.9% below the pre-recession peak. Agent sources placed prime retail yields in Preston at 6.75% at end 2017, showing no change on the level 6 months previous, consistent with the flat profile, on average, across the 200 PROMIS Towns. Prime yields in Preston remain 200 basis points above the pre-recession peak in 2006, compared to a PROMIS average of 183 basis points above peak.
COMPARISONS WITH THE PREVIOUS HEALTHCHECK	It should be noted that we have not comprehensively compared the 2018 data with the previous healthcheck analysis from 2013 undertaken by Deloitte as the two sets of data do not correlate and therefore are not comparable. The Deloitte study utilised the 'Goad Centre Report' methodology, whilst we have utilised the 'Goad Category Report' methodology. WYG use the Category Report methodology as it provides a more detailed breakdown of retail categories and provides a more in-depth analysis of the composition of town centres e.g. differentiating between the services and including a broader range of main town centre uses. Furthermore, Experian confirmed to WYG in February 2018 that the Category Report methodology should be the only method used within retail assessments, with the Centre Report methodology only published for historical reasons. The category report provides an accurate and transparent view of the centre, whereas the Centre Report methodology still groups certain categories under historical and incorrect Subclasses. Based on this information, and in the interest of providing a transparent and correct view of the composition of retail and service uses in Preston city centre, we have not attempted to compare the latest data against the previous Deloitte study which was assessed against a methodology that has since been updated. For completeness however, we provide a brief summary below of the findings of the previous healthchecks and the overall conclusions reached. The previous healthchecks were undertaken for Preston City Centre in 2010 as part of the Central Lancashire Retail Study and in 2012 to form part of the 2013 Preston City Centre Retail Study.

	The 2010 survey identified 759 retail units and 194,462 sq.m of retail floorspace in the city centre. The 2010 survey noted the following proportions of units, the proportions WYG observed are shown in (brackets): • Convenience: 6.34% (7.8%); • Comparison: 32.44% (30.6%); • Services: 47.17% (44.3%); and • Vacant: 14.96% (14.4% vacant including 5.0% under alteration). The 2013 survey identified 647 units and 148,794 sq.m. There is no justification provided in the 2013 Study with regard to the substantial reduction from the figures identified in 2010. Given the anomalies, we have concentrated principally on the 2010 diversity findings for the purpose of this analysis. The 2010 healthcheck noted the separation between the bus station and the rest of the City Centre, something which is being addressed through the City Centre Action Plan and the current developments happening at both the Bus Station and Markets Quarter. The pedestrian flow rate patterns noticed in the 2010 healthcheck broadly mirror the patterns observed in the latest survey, with concentrations of activity on Fishergate, lower Friargate and Orchard Street. More flows were noticed along upper Friargate than in the 2010 survey, possibly due to the increased presence of UCLAN. Regarding environmental quality, the 2010 study noted the high quality of the Fishergate Centre and St George's Centre (previously known as the Mall) and the lower quality of the St John's centre and Guildhall. It does not, however, note the areas to the south of Fishergate and Church Street (East). The 2010 survey noted concentrations of vacant units in and around the Miller Arcade, upper Friargate and Church Street. Whilst concentrations were noted along Church Street in the WYG survey, these almost seem to have shifted further away from the primary retail core of the City Centre.
CONCLUSION	Preston city centre is the principal centre within the Central Lancashire region, along with the principal centre within the administrative area. The centre performs an important role in providing retail, leisure and other main town centre uses to residents and visitors alike. It has seen a substantial level of investment despite the current commercial market and retail trends, demonstrating the confidence that both the public and private sector has in the city centre and its overall attraction.

	The centre has a strong national, regional and local retailer representation but there were disproportionately higher vacancy rates and floorspace compared to national figures, even when units subject to regeneration schemes or were currently under alteration were considered. The centre was generally considered to be highly accessible through a means of transport option, though some improvement could be had to pedestrian access from the north and cycle access. Whilst we consider the centres health as being mixed, exemplified by the clear east – west divide, we do consider this to have improved since the previous survey and that the planned schemes and strategies will help in improving the overall health and addressing the east west divide, providing they are all delivered. The east-west divide is prevalent in terms of the location of vacant units, pedestrian flow rates and environmental quality, with the eastern part of the centre generally having higher concentrations of vacant units, poorer environmental and building quality and less pedestrian activity than the west. With regards to pedestrian flow, a significant activity was seen heading in the direction of the bus station and it is considered that pedestrian flow patterns will alter now it has re-opened. Discussions with the Council have highlighted several projects which are being implemented or are earmarked to come forward in the future which would help address this imbalance. We would recommend amending the city centre boundary to remove areas to the south of Winkley Square and south of Cross Street. Our rationale behind this is because our observations during the survey showed that this area, despite being well connected and within walking distance of the city centre core and main shopping areas of Fishergate and Friargate, had minimal pedestrian activity observed due to it being primarily residential in nature. Whilst the inclusion of residential uses within a defined centre is not uncommon, we are of the opinion that this would ordinarily be as part of a more diverse mixture of main town centre uses, whereas this area was dominated by residential with some office uses observed. The residential uses themselves were medium to high density housing including terraced housing, medium to large sized apartment building conversions converted and also new build apartments. We consider this area to being in a peripheral location which is removed from the main functional core and area of the city centre and being more predominantly residential in character.

KEY ISSUES/SWOT	STRENGTHS • The city centre has strong transport public transport connections to the local and sub-regional area. Due to its position on the west coast mainline, we would consider there to be good connections at the regional level and nationally. • The city centre has an ample mix of surface level car parking and multi-storey car parking formats and a dedicated car park with adjacent mobility centre for disabled people. • The city is the principal shopping, leisure and service destination in the Central Lancashire Area, which is supported by a large catchment population – including students from UCLAN. • The city is the principal shopping, leisure, cultural and service destination in the Central Lancashire Area, which is supported by a large catchment population – including over 36,000 students and almost 3,000 staff from UCLAN and the higher education students and staff of Cardinal Newman College in the city centre. The Preston City Living Prospectus identifies an existing population of 8,000 residents and students living in the city centre; • Accessibility to the city centre, and within, is considered to be generally good, by both private transport and public transport and has been improved for pedestrians by recent public realm works to Fishergate. • We consider there is a strong national retailer and independent retailer representation in the city centre. The representation covers a broad variety of goods of a wide spectrum in terms of quality, accommodated both on the high street and within the indoor covered shopping centre formats. In addition, the Preston markets and Queens Retail Park provide other retail formats in the city centre providing a wider choice and offer for operators seeking representation. • Market and university city with distinctive and attractive city centre environment that encompasses a conservation area, historic assets and a number of listed, locally listed and period buildings. • Strong and varied growing leisure offer, particularly with the addition of the new Market Hall offering casual food and beverage amenities. Large and popular covered outdoor and box markets that attract visitors to the centre. • There is high quality public realm and built environment in areas of the city centre, which significantly contributes to the visual amenity, local distinctiveness and quality, notable areas being Fishergate public realm, the Flag Market area, Preston Markets, Winkley Square conservation area and Winkley Square Gardens, where the Winckley Square Townscape Heritage Initiative is in operation. Winckley Square

	Gardens has Green Flag Award status and retains Green Heritage Site Accreditation for the management of the historic gardens. A £1.2m 'sympathetic restoration' of Winckley Square Gardens was completed in winter 2106, backed by the Heritage Lottery Fund. The HLF funded public realm improvements on nearby Cannon Street have recently been completed. The city centre benefits from close proximity to Avenham Park, which has Green Flag Award status and is situated along the northern bank of the River Ribble. • The presence of a strong and active Business Improvement District (BiD) team. • Investment and regeneration activity and leadership in the city centre via the implementation of City Deal and the Preston Guild City projects. WEAKNESSES • A lack of larger foodstores within the city centre. • There is a stark and clear east – west divide in the centre in terms of the environmental quality of the street scene (and some buildings) and pedestrian activity, which is also partly reflected in the locations and concentrations of vacant units. However, this is likely to be in part addressed by the Fishergate Phase 3 public realm works and is acknowledged via the City Centre Plan areas allocated for Public Realm Improvements (Policy SP2) and City Centre Gateways (Policy SP3). Furthermore, the environmental quality of the Winckley Square Conservation Area contrasts with the adjoining Stoneygate area, which is the subject of an emerging Masterplan that may have scope to enhance these issues in the area. • The distribution of retail classes can be considered a weakness due to there being significant clustering in certain areas of the centre. The survey noted a concentration of comparison uses units in the western sections of the city centre, night clubs in the east section and fast food takeaways and 'drop-in' style retail service uses (notably barbers and hairdressers) along Friargate north. • Whilst accessibility is generally considered to be good, there are issues along the north and eastern fringes of the city centre, with Ringway acting as a physical barrier to these areas of the city – Particularly for pedestrians. However, there are signalled crossings at Ringway and the junction adjacent to the Crown Court is an allocated City Centre Gateway (Policy SP3), which will help to address this issue. Improvements have already taken place where Friargate and Corporation Street cross Ringway. • Presently, there is minimal representation of national chain family-orientate restaurants in the city centre, which also presents an opportunity for improvement looking forward.

	OPPORTUNITIES • There is a large array and variety of potential development sites and retail units in good locations within the primary shopping area and adjacent to the primary shopping area within the city centre. These sites present opportunities to improve the qualitative offer in the city centre from both a retail and leisure perspective, should there be market requirements. • Potential to attract new national multiple and independent operators, and particularly fashion operators, given the large student and young adult population in the city along with the growth in the resident and daytime population that will be delivered through the planned housing growth areas. • Several large-scale investment opportunities and regeneration projects coming forward which are addressing areas of poor environmental quality and concentrations of vacant units and also improving the range of uses in well-established areas. • Scope to grow the city centre residential population, thereby improving city centre footfall, via the delivery of a wider choice of new homes in the city centre, as envisaged in the Preston City Living Prospectus. • City Deal as a driver for investment in major housing, employment and infrastructure projects. • A healthy diverse city centre with scope for growth in the leisure and food and beverage sectors, within an existing environment containing high quality contemporary public realm and well maintained green infrastructure assets (e.g. Winckley Square, street trees), set near a riverside park. THREATS • Despite the number of regeneration projects coming forward in the centre being a positive indicator, there is a risk these may not be fully realised or stall entirely. • Threats from out of centre retail and leisure development both within and outside of Preston which could divert trade away from the city centre. • Lack of larger modern properties (over 500 and 1,000 sq.m) in the core retail areas limiting the potential of the centre to attract additional national multiple retailers. • Concentrations of small vacant units, pointing to a structural issue. • Wider macro-economic trends which show the decline in bricks-and-mortar retailing • Several major retailers (e.g. New Look, Debenhams, Marks & Spencer) have

	announced financial difficulties and have subsequently announced store closures will be necessary. At this point in time, the final list of store closures has not been confirmed but could include branches in the town centre.