# Appendix 3 – Bootle & Southport Health Check Assessments

# BOOTLE & SOUTHPORT HEALTH CHECK ASSESSMENTS

## Introduction

Set out below is WYG's assessment of the vitality and viability of the two key centres in Sefton, namely: Bootle and Southport.

## The Importance of Town Centres

These centres have an important role to play in Sefton for serving the needs of the local community. They form a focal point for the surrounding area and provide a wide range of services that are accessible to the population, including retail, employment, leisure and education facilities.

The National Planning Policy Framework (March 2012) emphasises the need for local authorities to monitor the health of their town centres and determine how they are changing over time. Indeed, vital and viable town centres help to foster civic pride, promote local identity and contribute towards the aims of sustainable development.

Since the turn of the century, town centres nationally have witnessed high levels of vitality and viability with strong retail sales growth and the implementation of major town centre redevelopment schemes. Therefore, despite the growth of out-of-centre retail development, development activity has been focused within established centres primarily linked to the ambitious expansion plans of national department stores and key retailers such as Debenhams, Primark and Next. However, the recent recession has had an impact on consumer spending which in turn has had a negative impact on the vitality of the high street nationally. This has led to an increase in vacancy rates within many town centres, as retailers attempt to compete in a challenging market and shop owners struggle to let their stores to retailers.

## Purpose of the Health Checks

It is important that these centres therefore remain competitive in light of increased competition and continue to attract shoppers, visitors and businesses. To achieve this, they must continually strive to build on their strengths, alleviate their weaknesses and improve the facilities they provide to the community. Successful town centres must also respond effectively to the changing needs and demand of their users.

## Methodology

In order to accurately determine and assess the vitality and viability of the centres, an up-to-date evidence base has been created by WYG. The majority of the health check work was undertaken during the initial site visits of each of the centres in order to obtain the most up-to-date evidence and photographs, with this information being supplemented by a number of other sources, including:

- Experian Goad mapping to determine the floorspace, retailer representation and vacancies data;
- Previous retail and leisure studies of relevance to the centres;
- Desk-based research using data from several sources, including Venuescore's UK Shopping Venue Rankings (2010), Valuation Office Agency data (July 2008), Estates Gazette and Focus; and
- Experian MMG3 Mapping Software, to obtain the existing and future projections of the population and expenditure figures.

## Health Check Indicators

The National Planning Policy Framework (NPPF) recognises the importance of local authorities preparing an up-to-date and sound evidence base to plan positively for town centre uses. In particular, it notes that this evidence base should be used to assess the role and function of town centres and the relationship between them, including any trends in the performance of the centres. Although the Framework does not provide a list of indicators which should be used to assess the health of a centre, the former Planning Policy Statement (PPS) 4: Planning For Sustainable Economic Growth (December 2009) had set out a number of key indicators which should be monitored on a regular basis in order to judge the health of a centre and its performance over time. The performance indicators outlined in PPS4 comprised the following:

### Health Check Indicator A1 – Diversity of Main Uses

The A1 indicator makes reference to the need to review the diversity of main town centre uses (by number, type and amount of floorspace). This will include reviewing the different function of each unit to determine whether it represents a convenience, comparison, retail service, leisure service or financial and business service use. This information is obtained from Experian Goad, though it should be noted that smaller centres are less likely to have been surveyed by Experian. The analysis by WYG compares the proportion of different uses in each centre against the UK national average rates.

### Health Check Indicator A2 – The Amount of Retail, Leisure and Office Floorspace in Edge-of-Centre and Out-of-Centre Locations

In addition to reviewing the diversity of retail, leisure and office uses in a town centre, there is also a requirement to review the quantum of floorspace which exists in edge-of-centre and out-of-centre locations. The NPPF defines that retail units at edge-of-centre locations are defined as being well connected and up to 300 metres from the Primary Shopping Area of the town centre, and that for all other main town centre uses, it should be within 300 metres of a town centre boundary.

### Health Check Indicator A3 – Potential Capacity for Growth or Change

This indicator involves a review of the opportunities available for the centre to expand or consolidate, with this information typically measured in the amount of land available for new or more intensive forms of town centre development. The indicator also requires the review of any extant or emerging planning permissions for new town centre uses, both within and out of the centre. In addition, land which has been allocated within the development plan for town centre uses and which may have not come forward and/or which may be vacant will also be identified to assess any potential new development sites for town centre uses.

**Health Check Indicator A4 – Retailer Representation and Retailer Demand**

Indicator A4 should be used to determine the existing retailer representation in a given centre and intentions to change representation within centres, including the demand of retailers wanting to come into a centre. The Focus database is used to identify commercial demand and retailer requirements for floorspace in town centres, whilst also recognising that this source only represents a limited number of operators. WYG note that such requirement searches will also not identify independent retailers considering premises in the area. In addition, it should be noted that retailer demand can also be strongly influenced by the provision of new schemes being made available and effectively marketed. The analysis can also include a review of the number of national or independent retailers which are present within a centre, recognising that multiple retailers (such as Boots, Marks & Spencer and Debenhams) can act as anchor tenants in the centre, thus adding to its appeal and attracting a greater number of shoppers. Venuescore's UK Shopping Venue Rankings (2011) is used to identify the retail hierarchy of the centres, using a weighted scoring system which takes account of the presence in each location of multiple retailers.

**Health Check Indicator A5 – Shopping Rents**

An analysis of the rate of Zone A shopping rental patterns in the primary shopping area of a town centre can provide an important indication of the overall strength and competitiveness of the centre. It is also important to review the movement of rental patterns over a few years and compare the figures with other nearby centres. Zone A rents is defined as the value for the first six metres of floorspace in retail units from the shop window. The data can be obtained from Estates Gazette and Focus, which uses Colliers CRE's data in respect of open market Zone A rents.

**Health Check Indicator A6 – Vacant Street-Level Property**

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

**Health Check Indicator A7 – Commercial Yields**

The commercial yield on non-domestic property data is obtained from the Valuation Office Agency (July 2008) and is deemed a reliable indicator of general health as it reflects investor confidence in a centre. The yield value is calculated by determining the open market rent of a unit as a percentage of its capital value. A low yield generally indicates that a town is considered to be attractive and, as a result, be more likely to attract investment than a town with high yields. The data can also demonstrate the confidence of investors in the long-term profitability of the centre for retail, office and other commercial developments.

**Health Check Indicator A8 – Land Values**

The land value of a site and the length of time it may have remained undeveloped can provide an important indication as to how flexible the planning policies on the site can be and can help to inform planning decisions. However, it should be recognised that each parcel of land is often subject to a unique set of circumstances, for example physical or ownership constraints, which could affect the likelihood of the land being developed.

**Health Check Indicator A9 – Pedestrian Footfall**

The analysis of the pedestrian footfall of a town centre is deemed as a key indicator of the vitality of the area. It is measured by recording the number and movement of people in different areas of a centre.

**Health Check Indicator A10 – Accessibility**

The accessibility of a centre is a key measure of its vitality and viability, noting that this will be determined by the ease and convenience of access by a choice of means of travel (including the quality, quantity and type of car parking; the frequency and quality of public transport services; and the range of customer origins served), quality of provision for pedestrians, cyclists and disabled people and the ease of access from the main arrival points to the main attractions in the centre.

**Health Check Indicator A11 – Customer and Residents' Views and Behaviour**

Regular surveys are often used by local authorities to obtain the views of customers and residents in their area, with the findings often helpful for monitoring and evaluating the effectiveness of town centre improvements and for identifying future priorities. The survey can either be undertaken in the town centre or at home, with WYG regularly appointing survey companies to determine the pattern of retail and leisure expenditure patterns in the local area and to establish the degree of linked trips.

**Health Check Indicator A12 – Perception of Safety and Occurrence of Crime**

The perception of the safety and security of a town centre can include a number of indicators, for example: the number of CCTV systems in operation; the crime levels; the police presence in the street; whether there is a Pub Watch/Street Watch scheme in operation; and any other issues associated with the night-time economy.

**Health Check Indicator A13 – Town Centre Environmental Quality**

The final indicator requires a review of the quality of the town centre environment, including an assessment of the positive and negative factors affecting environmental quality, such as the provision of trees, open spaces and landscapes, as well as potential problems, including noise, clutter, litter and graffiti.

# SEFTON RETAIL STRATEGY REVIEW 2011

This health check update report of Bootle and Southport by WYG has been informed by a number of other specific information sources, including the following:

- Sefton District Centres, Local Centres and Shopping Parades Study (WYG, March 2004);
- Sefton Retail Strategy Review 2005 (WYG, February 2006);
- Sefton Retail Strategy Review Update 2009 (WYG, June 2009); and
- Southport Town Centre Retail Strategy (WYG, February 2011).

WYG has drawn on the findings from these studies and, where possible, made comparisons with the data to identfiy any historic changes in the centres.

The health check analysis by WYG has focused on an assessment of the performance of the two argest centres in Sefton which are Bootle and Southport. A comprehensive and detailed evidence base is available for these centres, with GOAD mapping providing the floorspace data used to determine the diversity of use.

The following section summarises the key findings from the health check analysis, with the PPS4 indicator headings used to categorise the analysis and figures from the site visit and other evidence resources. It is then followed by an in-depth review of the vitality and viability for each of the centres.

**Table 1:** Summary of Bootle and Southport (July 2011)

| Centre | Total No. of Outlets | Total Amount of Floorspace (Sq m) |
|---|---|---|
| Bootle | 210 | 44,050 |
| Southport | 760 | 159,420 |

Source: Site Visit-July 2011 and Goad database

## Health Check Indicator A1 – Diversity of Main Town Centre Uses

**Table 2:** Diversity of Use Figures of Bootle and Southport (July 2011)

| July 2011 | Convenience | | Comparison | | Retail Service | | Leisure Service | | Financial/Business Service | | Vacant | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | No. | % | No. | % | No. | % | No. | % | No. | % | No. | % |
| Bootle | 21 | 10.0% | 75 | 35.7% | 22 | 10.5% | 29 | 13.8% | 23 | 11.0% | 40 | 19.0% |
| Southport | 50 | 6.6% | 275 | 36.2% | 82 | 10.8% | 187 | 24.6% | 64 | 8.4% | 102 | 13.4% |
| **UK Average*** | - | **8.4%** | - | **33.5%** | - | **13.2%** | - | **21.8%** | - | **11.0%** | - | **11.8%** |

Source: Site Visit, July 2011 and Goad database
*UK Average Figure, Goad, July 2011

**Table 3:** Floorspace Figures of Bootle and Southport (July 2011)

| July 2011 | Convenience | | Comparison | | Retail Service | | Leisure Service | | Financial/Business Service | | Vacant | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Sq m | % | Sq m | % | Sq m | % | Sq m | % | Sq m | % | Sq m | % |
| Bootle | 6,290 | 14.3% | 18,370 | 41.7% | 3,220 | 7.3% | 7,120 | 16.2% | 3,800 | 8.6% | 5,250 | 11.9% |
| Southport | 16,690 | 10.5% | 58,960 | 37.0% | 9,660 | 6.1% | 40,890 | 25.6% | 11,600 | 7.3% | 21,620 | 13.6% |
| **UK Average*** | - | **14.3%** | - | **37.0%** | - | **7.0%** | - | **22.8%** | - | **8.4%** | | **9.8%** |

Source: Site Visit, July 2011 and Goad database
*UK Average Figure, Goad, July 2011

# HEALTH CHECK ASSESSMENTS
# ANALYSIS OF PUBLISHED DATA SOURCES

## Health Check Indicator A4 – Retailer Representation and Retailer Demand

**Regional Retail Hierarchy**

Table 4 illustrates the position of Bootle and Southport within the hierarchy of centres based on the Venuescore's UK Shopping Venue Rankings (2011). The index ranks 2,291 retail venues within the UK (including town centres, stand-alone malls, retail warehouse parks and factory outlet centres) based on current retail provision. Towns and major shopping centres are rated using a scoring system which takes account of the presence in each location of multiple retailers – including anchor stores, fashion operators and non-fashion multiples.

Southport is classed as a regional centre by Venuescore (2011) and is currently ranked 81$^{st}$ out of all of the retail venues surveyed, placing it within the top 4% of UK shopping venues. Its retail ranking has decreased from a peak of 44$^{th}$ in 2005, with no data available for 2007. The retail ranking for Bootle 'classified as a major district centre' has also declined slightly between 2005 and 2011, with a ranking of 247$^{th}$ in 2005, 267$^{th}$ in 2007 and 260$^{th}$ in 2011.

Other important nearby centres include Liverpool (identified as a major city), Preston (major regional), St Helens (regional) and Birkenhead (regional), with Liverpool and Preston the only major centres to experience an improvement in their retail ranking. It is evident that many of these other centres are performing well and have a strong influence on shopping patterns within the study area – particularly Liverpool.

**Table 4:** The Sub-Regional Shopping Hierarchy

| Centre | Score | Location Grade | Rank 2011 | Rank 2007 | Rank 2005 | Change in Rank 2005-2011 |
|---|---|---|---|---|---|---|
| Liverpool | 539 | Major City | 4 | 12 | 15 | ↑ + 11 |
| Preston | 283 | Major Regional | 29 | 35 | 36 | ↑ + 7 |
| **Southport** | **198** | **Regional** | **81** | **n/a** | **44** | **↓ - 37** |
| Birkenhead | 157 | Regional | 136 | 107 | 96 | ↓ - 40 |
| St Helens | 152 | Regional | 143 | 126 | 93 | ↓ - 50 |
| **Bootle** | **98** | **Major District** | **260** | **267** | **247** | **↓ - 13** |
| Aintree | 92 | Major District | 282 | 310 | 352 | ↑ + 70 |
| Ormskirk | 64 | District | 449 | 361 | 345 | ↓ - 104 |
| Huyton | 57 | District | 500 | 434 | 533 | ↑ + 33 |
| Kirkby | 45 | Minor District | 637 | 611 | 626 | ↓ - 11 |
| Formby | 43 | Minor District | 667 | 543 | 605 | ↓ - 62 |
| Maghull | 38 | Minor District | 760 | 590 | 581 | ↓ - 179 |
| Crosby | 23 | Local | 1,261 | 886 | 1,002 | ↓ - 259 |
| Netherton | 20 | Local | 1,436 | 1,448 | 1,222 | ↓ - 214 |
| Litherland | 14 | Local | 1,915 | n/a | n/a | - |
| Waterloo | 13 | Local | 2,029 | 1,304 | 1,282 | ↓ - 747 |
| Garston | 13 | Local | 2,029 | 1,383 | 1,362 | ↓ - 667 |

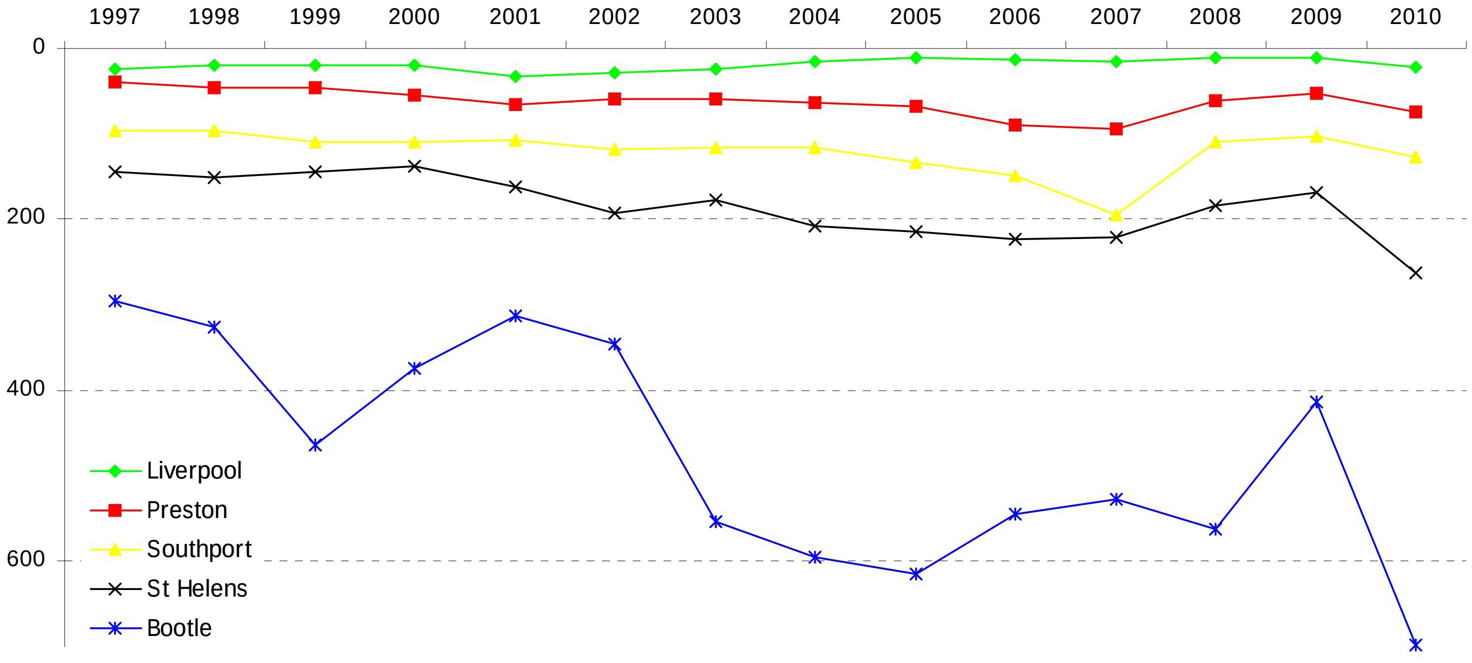
Source: Venuescore (2011)

**Retailer Demand / Ranking**

The Focus reports produced for Bootle and Southport were also reviewed to examine their retail ranking (based on retailer demand) between 1997 and 2010. The Focus reports for Liverpool, Preston and St Helens were also studied in order to compare how other nearby competing centres were performing.

Between 2009 and 2010, each of the five centres experienced a reduction in their retail ranking, with Bootle in particular experiencing a significant decline in its retail ranking. The retail ranking of Liverpool declined from 12th to 22nd, which is surprising considering its improved Venuescore in the sub-regional shopping hierarchy and the success of the Liverpool One shopping centre (albeit many of the requirements may have now been satisfied). Southport experienced a peak in its retail ranking in 1998 when it was ranked 96th, though it subsequently declined to 194th in 2007.

**Figure 1:** Retail Ranking



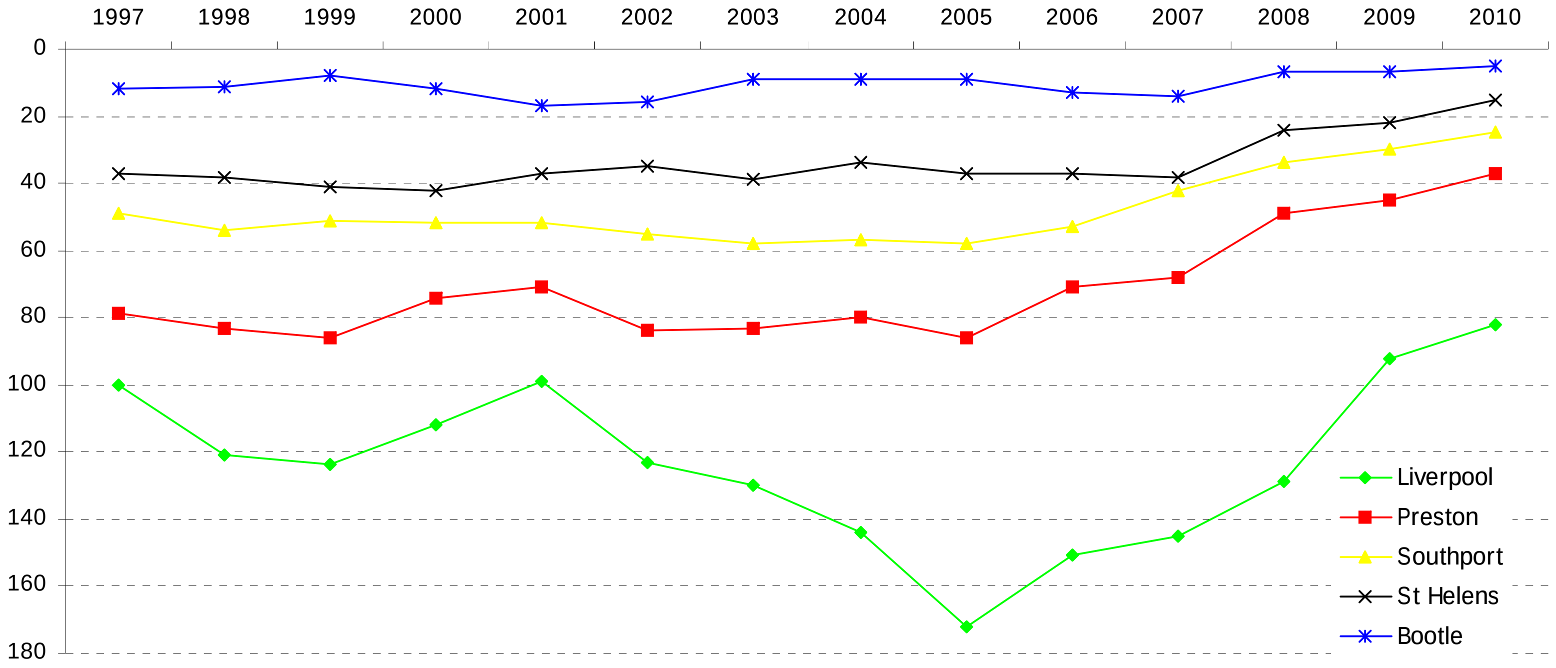

Source: Focus Report (July 2011)

**Retailer Requirements**

The Focus reports for the centres of Southport and Bootle were reviewed to determine the number of retailers who are seeking representation in both of the centres. The Focus reports for Liverpool, Preston and St Helens were also studied in order to compare how other nearby competing centres are performing.

It is evident that, in-line with the retail ranking of the centres, Liverpool, Preston and Southport are subject to the greatest number of retailers seeking representation, with 82 retailers having a requirement in Liverpool, 37 in Preston and 25 in Southport in 2010. In contrast, St Helens and Bootle have fewer retailers wishing to locate in these centres, with both centres experiencing a peak in the retailer requirements in 2000/2001. Since then, with the exception of a slight improvement between 2005 and 2007, there has been a decline in the retailer requirements. A total of 15 retailers were seeking representation in St Helens and just 5 retailers in Bootle in 2010.

**Figure 2:** Retail Requirements




Source: Focus Report (July 2011)

## Health Check Indicator A5 – Shopping Rents

Table 5 identifies the changes in Zone A rents in Liverpool, Preston, St Helens, Southport and Bootle between June 2003 and June 2009. It is evident that the rental level for Liverpool is far in excess of the other nearby centres, reflecting its important role as a key retail and commercial destination in the North West Region. The shopping rental levels for St Helens are surprisingly high when reviewing it against its retail ranking and it is the only centre to have not experienced a reduction in its rental value between June 2008 and June 2009.

**Table 5:** Prime Pitch Zone A Rents (£/sq m)

| Centre | June '03 | June '04 | June '05 | June '06 | June '07 | June '08 | June '09 |
|---|---|---|---|---|---|---|---|
| Liverpool | £2,960 | £2,960 | £3,229 | £3,445 | £3,445 | £3,445 | £2,906 |
| Preston | £1,507 | £1,507 | £1,507 | £1,507 | £1,507 | £1,561 | £1,399 |
| St Helens | £1,076 | £1,076 | £1,076 | £1,076 | £1,076 | £1,130 | £1,130 |
| Southport | £915 | £861 | £861 | £861 | £915 | £915 | £753 |
| Bootle | £700 | £700 | £753 | £753 | £753 | £753 | £646 |

Source: Focus Report based on Colliers CRE's opinion of open market Zone A rents

## Health Check Indicator A6 – Vacant Street – Level Property

Table 6 indicates the number of vacant units in the centres, with both Bootle and Southport having an above average number of vacant units and amount of vacant floorspace, in comparison to the national average figures. In July 2011, it was recorded that 19.0% of units in Bootle and 13.4% of units in Southport were vacant, in contrast to the UK figure of 11.8%. In terms of the amount of vacant floorspace, the centres were only slightly above the respective national figure of 9.8%, with 11.9% of the floorspace in Bootle (5,250 sq m) and 13.6% in Southport identified as being vacant in July 2011.

**Table 6:** Vacant Units in July 2011

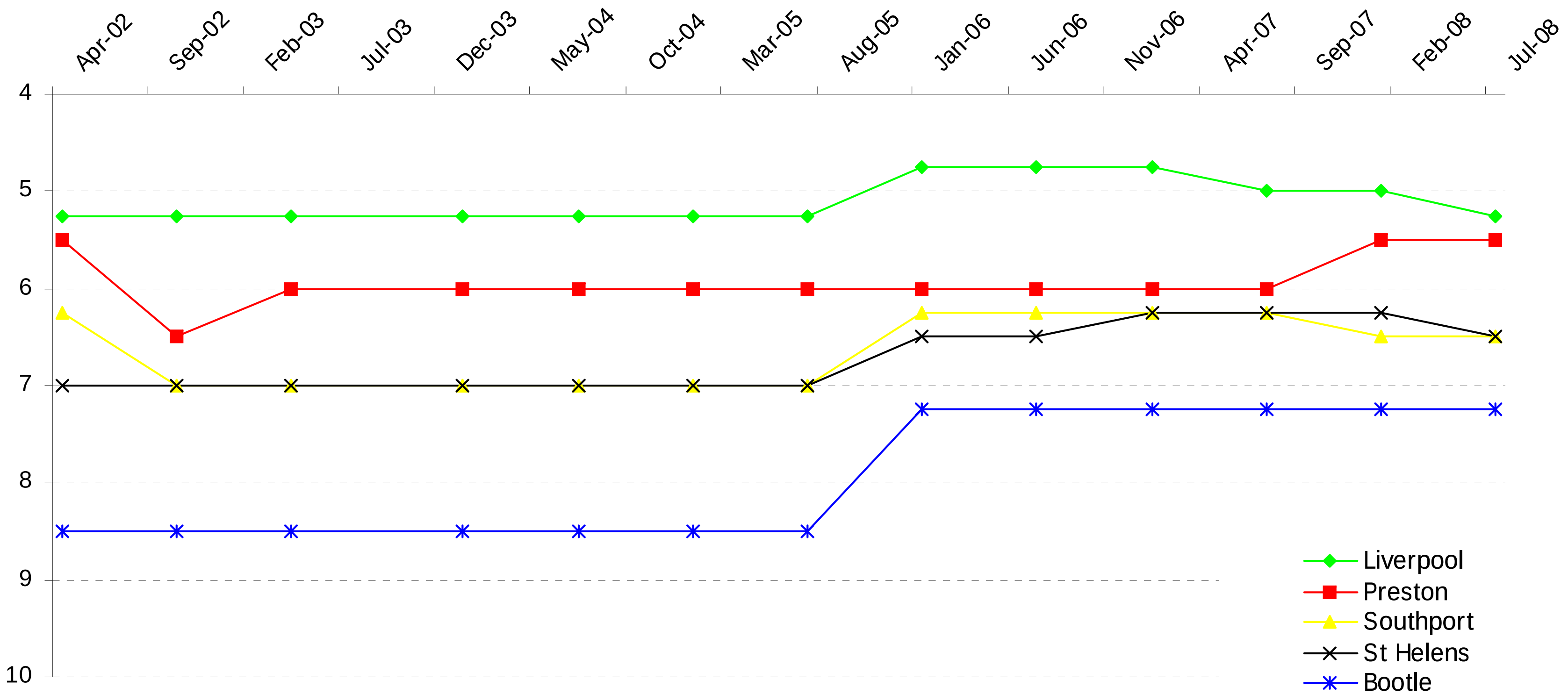
| Centre | Total No. of Vacant Outlets | % of Outlets | Total Amount of Vacant Floorspace (sq m) | % of Floorspace |
|---|---|---|---|---|
| Bootle | 40 | 19.0% | 5,250 | 11.9% |
| Southport | 102 | 13.4% | 21,620 | 13.6% |
| **UK Average*** | **-** | **11.8%** | **-** | **9.8%** |

Source: Site Visit, July 2011 and Goad database, *UK Average Figure, Goad, July 2011

## Health Check Indicator A7 – Commercial Yields

The most recent commercial yields figures from the Valuations Office Agency (July 2008) demonstrate the confidence of investors in each of the five centres (Liverpool, Preston, Southport, St Helens and Bootle). Figure 3 indicates that Liverpool has the lowest yield of the centres, reaching 5.25% in July 2008. This indicates that it has the greatest level of investor confidence, whilst also noting that it had experienced a decline from its peak of 4.75% between January 2006 to 2007. The commercial yields acheieved in the nearby centres of Preston and Bootle have gradually increased between 2002 and 2008, with Bootle having a yield of 7.25% in July 2008.

**Figure 3:** Commercial Yield Value




Source: Valuations Office Agency (July 2008)

# BOOTLE HEALTH CHECK ASSESSMENT

**Status:** Town Centre (Sefton UDP 2006)

## Centre Overview

Bootle Town Centre is the second largest shopping centre in Sefton and is the main centre serving the south of the Borough. The Sefton Core Strategy Options Paper (May 2011) notes that the primary aim of the document is to support the urban regeneration of the Borough, especially in Bootle and Central Southport.

The main focus of retailing within Bootle is the Strand Shopping Centre located between Washington Parade and Stanley Road. This was opened in 1968 and subsequently extended in 1999. Since then, ING (a Dutch financial services company) bought the Strand from previous owner Catalyst Capital (October 2004) for £380m. Other retail units are also located along Stanley Road, although they tend to attract independent retailers and service providers. The Tesco Metro store at the Strand Shopping Centre and the Lidl store on Stanley Road are the main anchor foodstores in Bootle, in addition to the edge of centre Asda store and Aldi. The Marks and Spencer, Wilkinson and B&M Bargains stores are three of the largest comparison retailers in the centre.

Bootle is located at the junction of the A565 and A5058, 4 km to the north of Liverpool and 27 km to the south of Southport.

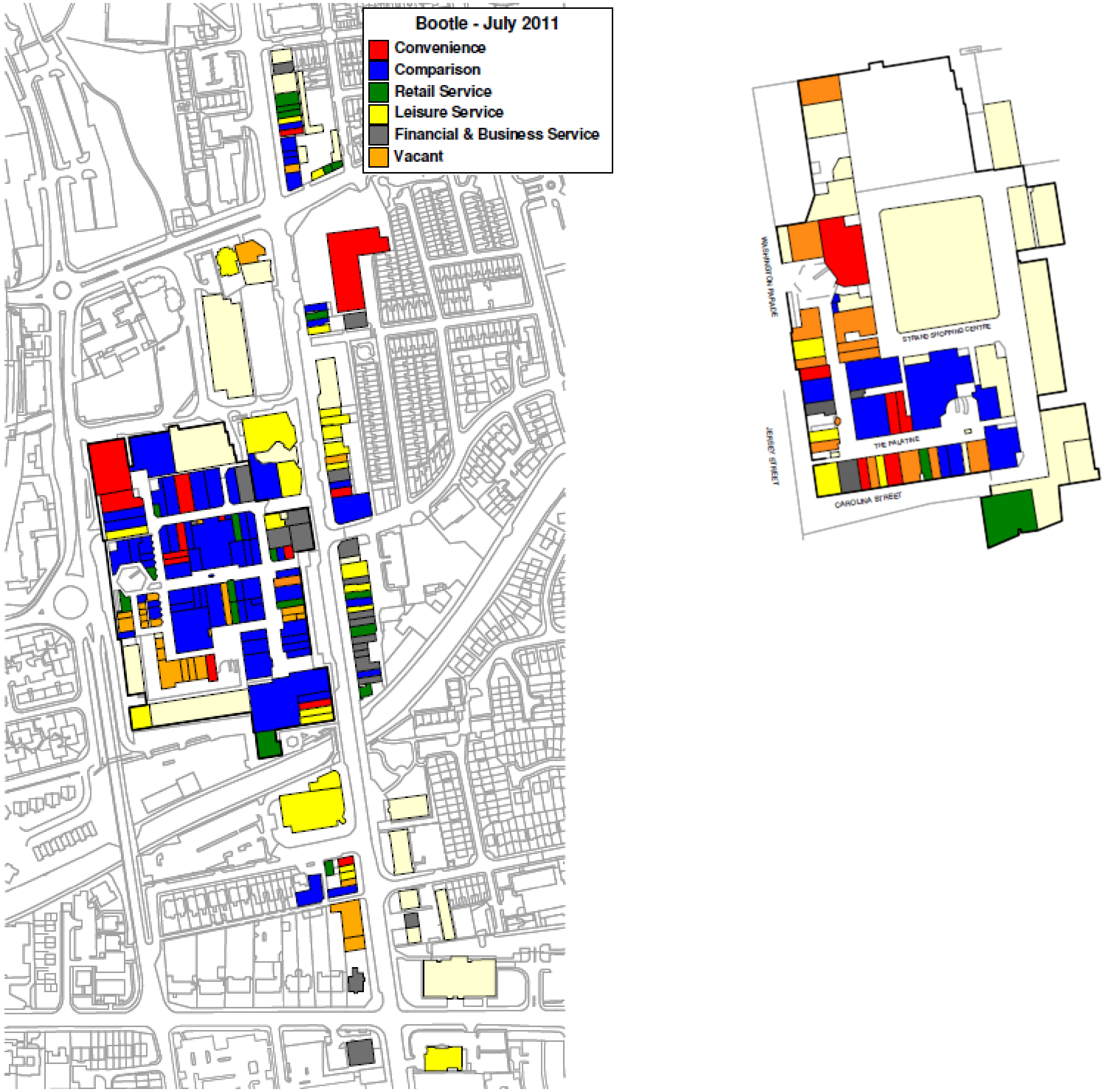
A site visit of the town centre was undertaken (in July 2011) in order to ensure that the health check analysis could be compiled using the most up-to-date diversity of use and floorspace figures. This information has then been used to compare the relevant data of Bootle town centre with the UK national average figures and, where necessary, identify any potential issues with the centre. The site visit data from July 2011 identified that there was a total of 210 ground floor units within Bootle town centre, comprising a total floorspace of 44,050 sq m. It is evident that the town centre is under represented in terms of the amount of retail service and leisure service units, whilst there is a good provision of convenience, comparison and financial & business service units. The figures indicate that there is an above average number of vacancies in the centre, with the amount of vacant floorspace also above the national average.

**Photographs of Bootle Town Centre (July 2011)**




**Photograph 1 (top left):** The Strand Shopping Centre
**Photograph 2 (top centre):** Lidl store, Stanley Road
**Photograph 3 (top right):** Bootle Bus Station & The Strand Shopping Centre, Washington Parade
**Photograph 4 (bottom left):** Stanley Road
**Photograph 5 (bottom centre):** Vacant unit, The Strand Shopping Centre
**Photograph 6 (bottom right):** Tesco Metro, The Strand Shopping Centre

**Figure 4:** Land Use Plan for Bootle Town Centre (July 2011)




Source: Site Visit (July 2011)

## Health Check Indicator A1 – Diversity of main town centre uses - Bootle

**Table 7:** Previous Diversity of Uses in Bootle Town Centre (December 2007)

| | Number of Units | | |
|---|---|---|---|
| | Number | Bootle | UK |
| Convenience | 22 | 10.4% | 8.5% |
| Comparison | 89 | 42.2% | 36.7% |
| Retail Service | 21 | 10.0% | 12.7% |
| Leisure Services | 31 | 14.7% | 20.9% |
| Financial and Business Services | 25 | 11.8% | 11.6% |
| Vacant | 23 | 10.9% | 9.7% |
| **Total** | **211** | **100%** | **100%** |

Source: Experian GOAD Report (December 2007)

**Table 8:** Previous Diversity of Uses in Bootle Town Centre (April 2009)

| | Number of Units | | |
|---|---|---|---|
| | Number | Bootle | UK |
| Convenience | 22 | 10.5% | 8.8% |
| Comparison | 78 | 37.1% | 34.9% |
| Retail Service | 19 | 9.0% | 13.0% |
| Leisure Services | 32 | 15.2% | 21.4% |
| Financial and Business Services | 23 | 11.0% | 11.3% |
| Vacant | 36 | 17.1% | 10.4% |
| **Total** | **210** | **100%** | **100%** |

Source: Experian Goad Report Updated by WYG Site Visit (April 2009)

**Table 9:** Existing Diversity of Uses in Bootle Town Centre (July 2011)

| | Number of Units | | |
|---|---|---|---|
| | Number | Bootle | UK* |
| Convenience | 21 | 10.0% | 8.4% |
| Comparison | 75 | 35.7% | 33.5% |
| Retail Service | 22 | 10.5% | 13.2% |
| Leisure Service | 29 | 13.8% | 21.8% |
| Financial and Business Service | 23 | 11.0% | 11.0% |
| Vacant | 40 | 19.0% | 11.8% |
| **Total** | **210** | **100%** | **100%** |

Source: Experian Goad Report Updated by WYG Site Visit (July 2011)
* UK Average Figure, Goad, July 2011

**Table 10:** Previous Floorspace in Bootle Town Centre (December 2007)

| | Previous Floorspace | | |
|---|---|---|---|
| | Sq m | Bootle | UK |
| Convenience | 6,510 | 14.8% | 13.7% |
| Comparison | 18,310 | 41.6% | 39.5% |
| Retail Service | 3,230 | 7.3% | 7.0% |
| Leisure Services | 7,770 | 17.6% | 22.5% |
| Financial and Business Services | 4,190 | 9.5% | 9.3% |
| Vacant | 4,020 | 9.1% | 8.0% |
| **Total** | **44,030** | **100%** | **100%** |

Source: Experian GOAD Report (December 2007)

**Table 11:** Previous Floorspace in Bootle Town Centre (April 2009)

| | Previous Floorspace | | |
|---|---|---|---|
| | Sq m | Bootle | UK |
| Convenience | 6,250 | 14.2% | 14.1% |
| Comparison | 18,910 | 42.9% | 38.2% |
| Retail Service | 3,120 | 7.1% | 7.0% |
| Leisure Services | 7,410 | 16.8% | 22.7% |
| Financial and Business Services | 3,760 | 8.5% | 8.8% |
| Vacant | 4,660 | 10.6% | 8.5% |
| **Total** | **44,110** | **100%** | **100%** |

Source: Experian Goad Report Updated by WYG Site Visit (April 2009)

**Table 12:** Existing Floorspace in Bootle Town Centre (July 2011)

| | Existing Floorspace | | |
|---|---|---|---|
| | Sq m | Bootle | UK* |
| Convenience | 6,290 | 14.3% | 14.3% |
| Comparison | 18,370 | 41.7% | 37.0% |
| Retail Service | 3,220 | 7.3% | 7.0% |
| Leisure Service | 7,120 | 16.2% | 22.8% |
| Financial and Business Service | 3,800 | 8.6% | 8.4% |
| Vacant | 5,250 | 11.9% | 9.8% |
| **Total** | **44,050** | **100%** | **100%** |

Source: Experian Goad Report Updated by WYG Site Visit (July 2011)
* UK Average Figure, Goad, July 2011

## Health Check Indicator A1 – Diversity of main town centre uses

**Convenience Units**

Table 9 shows the diversity of use in Bootle town centre in July 2011, with the 21 convenience units accounting for 6,290 sq m of floorspace. The percentage of units (10.0%) in use for the sale of convenience goods is slightly above the national average figure of 8.4%. The largest convenience units comprise the Lidl store on Stanley Road (1,830 sq m) and the Tesco Metro unit in the Strand Shopping Centre (1,210 sq m), with several other national retailers in the centre including Thorntons, Greggs, Cool Trader, Heron Foods and Iceland. There has been a decline of one convenience goods unit between April 2009 and July 2011, with an increase in floorspace of 40 sq m.

**Comparison Units**

Comparison traders in Bootle occupy 35.7% of all outlets in the town centre, which is slightly above the national average rate of 33.5%. In terms of the comparison goods floorspace provision in the centre, the 75 units account for 18,370 sq m of floorspace, with the percentage of floorspace in use for comparison goods (35.7%) slightly above the national average figure of 33.5%. The largest comparison goods units in Bootle comprise the Marks & Spencer, Wilkinson and B&M Bargains stores, with all three units located within the Strand Shopping Centre. There are a number of other national comparison retailers in the centre, including Argos, New Look, Vodafone, WH Smith and Superdrug. (T J Hughes on Mariners Way in the Strand was included in the data analysis by WYG but has since closed following the company's adminstration).

**Retail Services**

Retail services, which comprise such uses as hairdressers, dry cleaners and petrol filling stations, account for 10.5% of outlets (22 units) and 7.3% of floorspace (3,220 sq m) in Bootle, which compares to respective national averages of 13.2% and 7.0%. 'Health and beauty' traders are particularly dominant in this sector, with a total of 12 such businesses, followed by travel agents and opticians (three). There is a Post Office which is located in The Strand Shopping Centre. There are a number of national retail service operators in Bootle, including Specsavers, Max Spielmann and Thomas Cook.

**Leisure Services**

Leisure services, as defined by Experian GOAD, include uses such as restaurants, cafes, bookmakers and public houses. There is a limited provision of leisure service units and floorspace in Bootle in comparison to the national average, with a reduction of this sector identified between April 2009 and July 2011. There are currently eight casinos and betting offices in the centre, including several national operators, such as Ladbrokes and William Hill. The leisure service sector in Bootle also includes seven fast food and take away units, six public houses, three bingo and amusements arcades, three cafes, one restaurant and one bar.

**Financial and Business Services**

In terms of financial and business services in Bootle, the proportion of outlets occupied by such uses (11.0%) is identical to the national average figures, whilst the proportion of floorspace occupied by such uses (8.6%) is slightly above the national average level (8.4%). There are a total of seven financial service units in the centre, with this sector comprising a number of pawnbrokers and cheque centre-type operators. There are also seven retail banks (including HSBC, Santander and Halifax), six legal service units, one building society and one employment/careers service.

**Non-Retail Units**

In addition to the retail service on offer within Bootle, there are a number of non-retail uses, including: three government and municipal buildings, two information and advice centres and a library on Stanley Road.

## Health Check Indicator A4 – Retailer Representation and Retailer Demand

**Retail Rankings (Venuescore)**

As noted in **Table 4**, Bootle has experienced a decline of 13 places in its retail ranking, from 247$^{th}$ in 2005, 267$^{th}$ in 2007 and 260$^{th}$ in 2011. However, in contrast to other local town centres of St Helens, Southport, Aintree and Ormskirk, the rate of decline has been slower.

**Retailer Demand/Ranking (Focus database)**

The retail ranking (based on retailer demand) of Bootle has varied significantly between 1997 and 2010 (as indicated in **Table 13**), from a peak of 296$^{th}$ in 1997 and 312$^{th}$ in 2001, to 614$^{th}$ in 2005. More recently, the retail ranking of the town centre improved to 413$^{th}$ in 2009, though by 2010 Bootle had a greatly reduced ranking of 697$^{th}$.

**Table 13:** Retail Ranking/Demand

| Centre | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bootle | 296 | 325 | 464 | 375 | 312 | 345 | 553 | 594 | 614 | 545 | 528 | 562 | 413 | 697 |

Source: Focus (July 2011)

**National and Independent Retailers (Goad) and Top 20 Retailers (Focus)**

Bootle town centre accommodates a variety of independent and national retailers, with the majority of multiple operators accommodated within the Strand Shopping Centre. Focus identified in 2009 the 'Top Twenty Retailers' which are derived from ORC Data Service's ranking of the top 20 comparison goods multiples according to its forecast of average town centre sales for individual retailers within Great Britain. Noting that Woolworths and Rosebys have subsequently gone into administration, Bootle town centre accommodates seven of the 'Top Twenty Retailers' identified by Focus.

**Table 14:** Top 20 Retailers

| Rank | Retailer |
|---|---|
| **1** | **Boots** |
| **2** | **Marks & Spencer** |
| **3** | **Argos** |
| ~~4~~ | ~~Woolworths~~ |
| 5 | Debenhams |
| 6 | John Lewis |
| **7** | **WH Smith** |
| 8 | BHS |
| 9 | Next |
| 10 | Dixons |
| **11** | **Superdrug** |
| 12 | Lloyds Pharmacy |
| **13** | **Wilkinson** |
| 14 | Co-op Department Stores |
| 15 | Primark |
| **16** | **New Look** |
| 17 | HMV |
| 18 | Dorothy Perkins |
| ~~19~~ | ~~Rosebys~~ |
| 20 | Waterstones |

Source: Focus (2009)

**Retailer Requirements (Focus report and database)**

Table 15 identifies that the number of retailers seeking representation in Bootle has declined, from a peak of 17 in 2001 to 5 in 2010. The most up-to-date data from Focus (November 2011) identifies that there is currently two retailers seeking representation in Bootle, namely: The Chinese Buffet (557 sq m to 1,394 sq m) and Storm Clothing (93 sq m to 372 sq m).

**Table 15:** Retail Requirements

| Centre | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bootle | 12 | 11 | 8 | 12 | 17 | 16 | 9 | 9 | 9 | 13 | 14 | 7 | 7 | 5 |

Source: Focus (July 2011)

## Health Check Indicator A5 – Shopping Rents

Table 16 identifies the changes in Zone A rents in Bootle between 2003 and 2009. The Zone A Rents in the town centre reached a peak of £753 per sq m between June 2005 and 2008, with the most recent data in the Focus report from June 2009 identifying a value of £646 per sq m.

**Table 16:** Prime Pitch Zone A Rents (£/sq m)

| Centre | June '03 | June '04 | June '05 | June '06 | June '07 | June '08 | June '09 |
|---|---|---|---|---|---|---|---|
| Bootle | £700 | £700 | £753 | £753 | £753 | £753 | £646 |

Source: Focus Report (2011) based on Colliers CRE's assessment of open market Zone A rents

## Health Check Indicator A6 – Vacant Street-Level Property

The site visit in July 2011 found that the 40 vacant units in Bootle accounted for 5,250 sq m of the total floorspace in the town centre. The rate of vacant outlets (19.0%) was above the national average rate of 11.8%, whilst the actual proportion of total floorspace (11.9%) is also just above the UK average figure (9.8%).

**Table 17:** Vacancies in Bootle (July 2011)

| Vacancy Figures | | | |
|---|---|---|---|
| | Total | Bootle (%) | UK (%) |
| No. of Outlets | 40 | 19.0% | 11.8% |
| Floorspace (sq m) | 5,250 | 11.9% | 9.8% |

Source: Site Visit (July 2011)

The largest vacant unit in the town centre is the 490 sq m units on Stanley Road which was identified as being a Sullivan's bar and restaurant in April 2009. Both the number of vacant units and amount of vacant floorspace has increased since 2009, with an additional 4 vacancies and 590 sq m of floorspace.

**Figure 6:** Vacancies in Bootle Town Centre (July 2011)



Source: Site Visit (July 2011)

## Health Check Indicator A7 – Commercial Yields

The commercial yield of Bootle has gradually improved over the past decade. Commercial yields were at 9% in April 1995 and then improved to 8.5% in October 1999, and then remained at this figure until July 2005. Since then, commercial yields have improved again to 7.25%, which would suggest an increase in investor confidence in Bootle Town Centre.

## Health Check Indicator A9 – Pedestrian Footfall

A general pedestrian flow count was recorded during the site visit to Bootle in order to identify those areas of movement with a high or low pedestrian footfall. Certain units within the Strand Shopping Centre appeared to be extremely popular retail destinations, notably the Marks and Spencer, Tesco and Wilkinsons stores. There appeared to be good levels of pedestrian flows between the Lidl store on Stanley Road and the Strand Shopping Centre, with strong linkages between these units.

## Health Check Indicator A10 – Accessibility

**Car:** Bootle is situated between the A565 and the A5058, which connects to Liverpool in the south and Knowsley to the east. The nearest motorways to Bootle are the M57 (junction 5) and M62 (junction 4) and the M58.

**Car parks:** There are two main car parks in Bootle, both long stay and short stay. These car parks include: Bootle Leisure Centre (173 spaces); and Bootle New Strand (432 spaces).

**Public transport:** The town centre also benefits from good accessibility by public transport. There are two railway stations served by frequent electric services from Liverpool to Southport. They are the Oriel Road stations near the Victorian Civic Centre, and New Strand station, which is located adjacent to the Strand Shopping Centre. In addition, a bus station is located below the Strand Shopping Centre on Vermont Way which provides frequent services to the surrounding area and beyond.

# SOUTHPORT HEALTH CHECK ASSESSMENT

**Status:** Town Centre (Sefton UDP 2006)

## Centre Overview

Southport is the main shopping centre for the north of the Borough and is one of the North West's key seaside resorts. The centre not only serves the shopping needs of the local community but is a major destination for visitors and tourists throughout the year. The Sefton Core Strategy Options Paper (May 2011) notes that the primary aim of the document is to support the urban regeneration of the Borough, especially in Bootle and Central Southport. The Paper also identifies that Southport town centre will be the main focus of new shopping, leisure and other services in the area, with the smaller local centres of Ainsdale, Birkdale, Churchtown and Shakespeare Street to be protected and promoted as locations in which Sefton Council will encourage uses that meet a local need.

The main shopping facilities in the town centre are located along Chapel Street, Eastbank Street and Lord Street. Chapel Street is pedestrianised and accommodates a number of national multiples including Marks & Spencer, Debenhams and BHS. The main anchor foodstores in the town centre comprise the Morrisons store on Duke Street, the Sainsbury's on Lord Street, Lidl on Virginia Street and Iceland on King Street. Lord Street also accommodates many national multiple retailers and benefits from high quality Victorian architecture which create a unique shopping environment.

A site visit of the town centre has been undertaken in order to ensure that the health check analysis could be compiled using the most up-to-date diversity of use and floorspace figures. This information has then been used to compare the relevant data of Southport town centre with the UK national average figures and, where necessary, identify any potential issues with the centre. The site visit data from July 2011 identified that there was a total of 760 ground floor units within Southport town centre, comprising a total floorspace of 159,420 sq m. There is a strong level of comparison and leisure service units in the centre, whilst the level of convenience, retail service and financial and business service units is marginally below the national average. Both the percentage of units and amount of vacant floorspace is above the national average figures, though a reduction in vacancies was noted between February 2010 and July 2011.

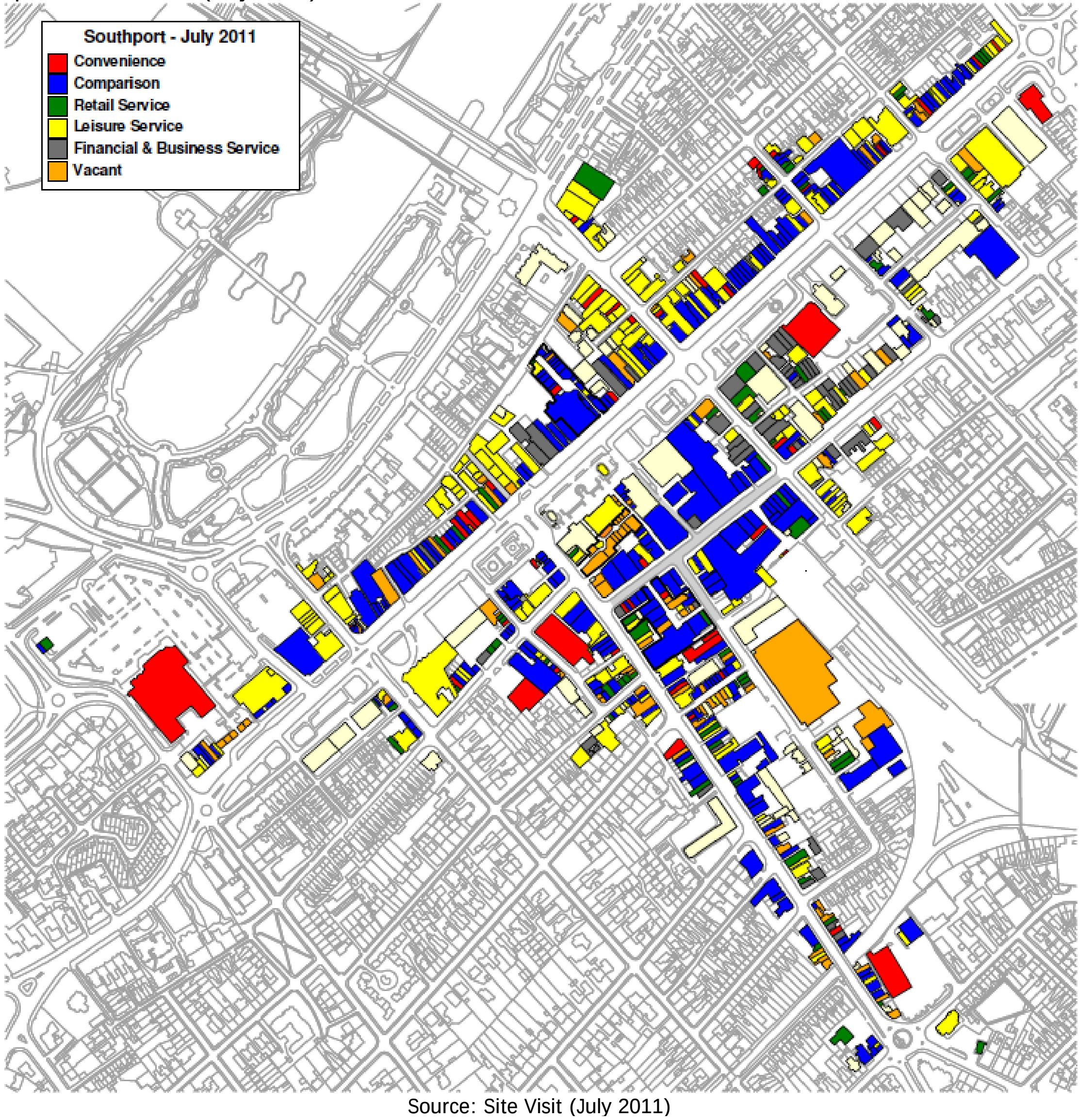
# Health Check Indicator A1 – Diversity of main town centre uses

**Photographs of Southport Town Centre (July 2011)**



**Photograph 7 (top left):** Outdoor market, Chapel Street
**Photograph 8 (top centre):** Eastbank Street
**Photograph 9 (top right):** Lord Street
**Photograph 10 (bottom left):** Southport Indoor Market, Market Street/King Street
**Photograph 11 (bottom centre):** Wesley Street
**Photograph 12 (bottom right):** Cambridge Walks

**Figure 7:** Land Use Plan for Southport Town Centre (July 2011)




Source: Site Visit (July 2011)

## Health Check Indicator A1 – Diversity of main town centre uses - Southport

**Table 18:** Previous Diversity of Uses in Southport Town Centre (April 2009)

| Number of Units | | | |
|---|---|---|---|
| | Number | Southport | UK |
| Convenience | 44 | 5.8% | 8.8% |
| Comparison | 279 | 36.5% | 34.9% |
| Retail Service | 75 | 9.8% | 13.0% |
| Leisure Services | 177 | 23.2% | 21.4% |
| Financial and Business Services | 64 | 8.4% | 11.3% |
| Vacant | 125 | 16.4% | 10.4% |
| **Total** | **764** | **100%** | **100%** |

Source: Experian Goad Report Updated by WYG Site Visit (April 2009)

**Table 19:** Previous Diversity of Uses in Southport Town Centre (February 2010)

| Number of Units | | | |
|---|---|---|---|
| | Number | Southport | UK |
| Convenience | 48 | 6.3% | 8.8% |
| Comparison | 287 | 37.7% | 34.1% |
| Retail Service | 76 | 10.0% | 13.1% |
| Leisure Services | 179 | 23.5% | 21.6% |
| Financial and Business Services | 62 | 8.1% | 11.1% |
| Vacant | 110 | 14.4% | 11.1% |
| **Total** | **762** | **100%** | **100%** |

Source: Experian Goad Report Updated by WYG Site Visit (February 2010)

**Table 20:** Existing Diversity of Uses in Southport Town Centre (July 2011)

| Number of Units | | | |
|---|---|---|---|
| | Number | Southport | UK* |
| Convenience | 50 | 6.6% | 8.4% |
| Comparison | 275 | 36.2% | 33.5% |
| Retail Service | 82 | 10.8% | 13.2% |
| Leisure Service | 187 | 24.6% | 21.8% |
| Financial and Business Services | 64 | 8.4% | 11.0% |
| Vacant | 102 | 13.4% | 11.8% |
| **Total** | **760** | **100%** | **100%** |

Source: Experian Goad Report Updated by WYG Site Visit (July 2011)
* UK Average Figure, Goad, July 2011

**Table 21:** Previous Floorspace in Southport Town Centre (April 2009)

| Previous Floorspace | | | |
|---|---|---|---|
| | Sq m | Southport | UK |
| Convenience | 15,270 | 9.6% | 14.1% |
| Comparison | 55,570 | 34.8% | 38.2% |
| Retail Service | 9,300 | 5.8% | 7.0% |
| Leisure Services | 38,730 | 24.3% | 22.7% |
| Financial and Business Services | 11,560 | 7.2% | 8.8% |
| Vacant | 29,170 | 18.3% | 8.5% |
| **Total** | **159,600** | **100%** | **100%** |

Source: Experian Goad Report Updated by WYG Site Visit (April 2009)

**Table 22:** Previous Floorspace in Southport Town Centre (February 2010)

| Previous Floorspace | | | |
|---|---|---|---|
| | Sq m | Southport | UK |
| Convenience | 15,730 | 9.9% | 14.3% |
| Comparison | 56,700 | 35.5% | 37.3% |
| Retail Service | 9,250 | 5.8% | 7.0% |
| Leisure Services | 39,160 | 24.5% | 22.7% |
| Financial and Business Services | 11,470 | 7.2% | 8.7% |
| Vacant | 27,270 | 17.1% | 9.3% |
| **Total** | **159,580** | **100%** | **100%** |

Source: Experian Goad Report Updated by WYG Site Visit (February 2010)

**Table 23:** Existing Floorspace in Southport Town Centre (July 2011)

| Existing Floorspace | | | |
|---|---|---|---|
| | Sq m | Southport | UK* |
| Convenience | 16,690 | 10.5% | 14.3% |
| Comparison | 58,960 | 37.0% | 37.0% |
| Retail Service | 9,660 | 6.1% | 7.0% |
| Leisure Service | 40,890 | 25.6% | 22.8% |
| Financial and Business Services | 11,600 | 7.3% | 8.4% |
| Vacant | 21,620 | 13.6% | 9.8% |
| **Total** | **159,420** | **100%** | **100%** |

Source: Experian Goad Report Updated by WYG Site Visit (July 2011)
* UK Average Figure, Goad, July 2011

## Health Check Indicator A1 – Diversity of main town centre uses

The data in Tables 18 to 23 has been obtained from the site visits in April 2009, February 2010 and July 2011.

**Convenience Units**

Table 20 shows the diversity of use in Southport town centre in July 2011, with the 50 convenience units accounting for 16,690 sq m of floorspace. The percentage of units (6.6%) and percentage of floorspace (10.5%) in use for the sale of convenience goods figures are both slightly below the respective national average figures of 8.4% and 14.3%. At present, there is a strong presence from national brands, namely Lidl (Virginia Street, 1,410 sq m), Sainsbury's (Lord Street, 2,120 sq m) and Morrisons (Duke Street, 5,490 sq m). There are also a number of other national convenience traders within the town centre, including Greggs bakery (Lord Street, 150 sq m), Thornton's (Chapel Street, 60 sq m) and Farmfoods (Lord Street, 770 sq m). An outdoor market is frequently held on Chapel Street, with an indoor market located on King Street/Market Street.

**Comparison Units**

Comparison traders in Southport occupy 36.2% of all outlets in the town centre, which is slightly above the national average rate of 33.5%. In terms of the comparison goods floorspace provision in the centre, the 275 units account for 58,960 sq m of floorspace, with the percentage of floorspace in use for comparison goods (36.2%) slightly above the national average figure of 37.0%. Lord Street, within the town centre, acts as the key high street within Southport and has a large variety of comparison units. The largest comparison units within Southport town centre comprise the Marks and Spencer (3,450 sq m) which is on Chapel Street, Debenhams on Lord Street (2,070 sq m) and Stokers furniture store (1,820 sq m) which is on Union Street. Other national comparison retailers in the town centre include BHS (Chapel Street, 1,360 sq.m), Wilkinsons (London Street, 780 sq m), Topman & Topshop (Chapel Street, 590 sq m) and Primark (Chapel Street, 580 sq m). The highest concentration of the smallest comparison trading units are concentrated along Eastbank Street, Wayfarers Arcade and Lord Street, with these units occupied by small independent traders, including clothing, jewellery and gift stores.

**Retail Services**

Retail services, which comprise such uses as hairdressers, dry cleaners and petrol filling stations, account for 10.8% of outlets (82 units) and 6.1% of floorspace (9,660 sq m) in Southport, which compares to respective national averages of 13.2% and 7.0%. 'Health and beauty' traders are particularly dominant in this sector, with a total of 52 such businesses, followed by opticians (six units) and travel agents (five units). There is a Post Office which is located Lord Street. There are a number of national retail service operators in Southport, including Max Spielmann, Specsavers and Thomas Cook.

**Leisure Services**

Leisure services, as defined by Experian GOAD, include uses such as restaurants, cafes, bookmakers and public houses. Southport is well-provided for in terms of the number of leisure units in the town centre, with the 187 units occupying 24.6% of all the outlets. The proportion of floorspace occupied by the leisure sector (25.6%) is above the national average (22.8%). There are a total of 49 cafes, 34 fast food & take away units and restaurants and 23 public houses in the town centre. There are several national leisure operators in Southport, including Starbucks, Ladbrokes, Dominos Pizza and Pizza Hut. A Ramada Jarvis hotel is also located outside of the defined Goad town centre boundary.

**Financial and Business Services**

In terms of the proportion of units occupied by financial and business services in Southport, the proportion of outlets (8.4%) is slightly below the national average figure (11.0%), whilst the proportion of floorspace occupied by such uses in the town centre (7.3%) is above the national average level (8.4%). There are a total of 64 financial and business service sector units in the town centre, including 18 property services in the town centre, 13 financial services, 10 retail banks and 8 legal services. There are a number of national operators in Southport, including Nationwide Building Society, Halifax and Santander.

**Non-Retail Units**

In addition to the retail service on offer within Southport town centre there is also several other non-retail units, including sixteen offices, five government and municipal buildings, four information and advice centres, four medical services and three religious institutions.

## Health Check Indicator A4 – Retailer Representation and Retailer Demand

**Retail Rankings (Venuescore)**

As noted in Table 4, Southport has experienced a decline in its retail ranking of 37 places, from a peak of 44$^{th}$ in 2005 to 81$^{st}$ in 2011. Southport is classed as a regional centre by Venuescore (2011) and is currently ranked within the top 5% of UK shopping venues.

**Retailer Demand / Ranking (Focus database)**

The retail ranking (based on retailer demand) of Southport has gradually declined, from a peak of 96$^{th}$ in 1998 to 194$^{th}$ in 2007. Since then, the ranking has improved to 126$^{th}$ in 2010.

**Table 24:** Retail Ranking/Demand

| Centre | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Southport | 97 | 96 | 109 | 109 | 107 | 118 | 115 | 116 | 133 | 149 | 194 | 109 | 103 | 126 |

Source: Focus (July 2011)

### National and Independent Retailers (Goad) and Top 20 Retailers (Focus)

Southport town centre accommodates a variety of independent and national retailers. Focus identified in 2009 the 'Top Twenty Retailers' which are derived from ORC Data Service's ranking of the top 20 comparison goods multiples according to its forecast of average town centre sales for individual retailers within Great Britain. Noting that Woolworths and Rosebys have subsequently gone into administration, the town centre accommodates thirteen of the 'Top Twenty Retailers' identified by Focus.

**Table 25:** Top 20 Retailers

| Rank | Retailer |
|---|---|
| **1** | **Boots** |
| **2** | **Marks & Spencer** |
| **3** | **Argos** |
| ~~4~~ | ~~Woolworths~~ |
| **5** | **Debenhams** |
| 6 | John Lewis |
| **7** | **WH Smith** |
| **8** | **BHS** |
| **9** | **Next** |
| 10 | Dixons |
| **11** | **Superdrug** |
| 12 | Lloyds Pharmacy |
| **13** | **Wilkinson** |
| 14 | Co-op Department Stores |
| **15** | **Primark** |
| **16** | **New Look** |
| **17** | **HMV** |
| **18** | **Dorothy Perkins** |
| ~~19~~ | ~~Rosebys~~ |
| 20 | Waterstones |

Source: Focus (2009)

**Retailer Requirements (Focus report and database)**

Table 26 identifies that the number of retailers seeking representation in Southport has declined, from a peak of 58 in 2003 and 2005 to 25 in 2010. The most up-to-date data from Focus (November 2011) identifies that there are currently only four retailers seeking representation in the town centre, namely: Bargain Book Time, Charles Clinkard and the Calendar Club.

**Table 26:** Retail Requirements

| Centre | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Southport | 49 | 54 | 51 | 52 | 52 | 55 | 58 | 57 | 58 | 53 | 42 | 34 | 30 | 25 |

Source: Focus (July 2011)

## Health Check Indicator A5 – Shopping Rents

Table 27 identifies the changes in Zone A rents in Southport between 2003 and 2009, with the town centre experiencing a reduction in its Zone A rental values from a peak of £915 per sq m in June 2007 and 2008 to £753 per sq m in June 2009.

**Table 27:** Prime Pitch Zone A Rents (£/sq m)

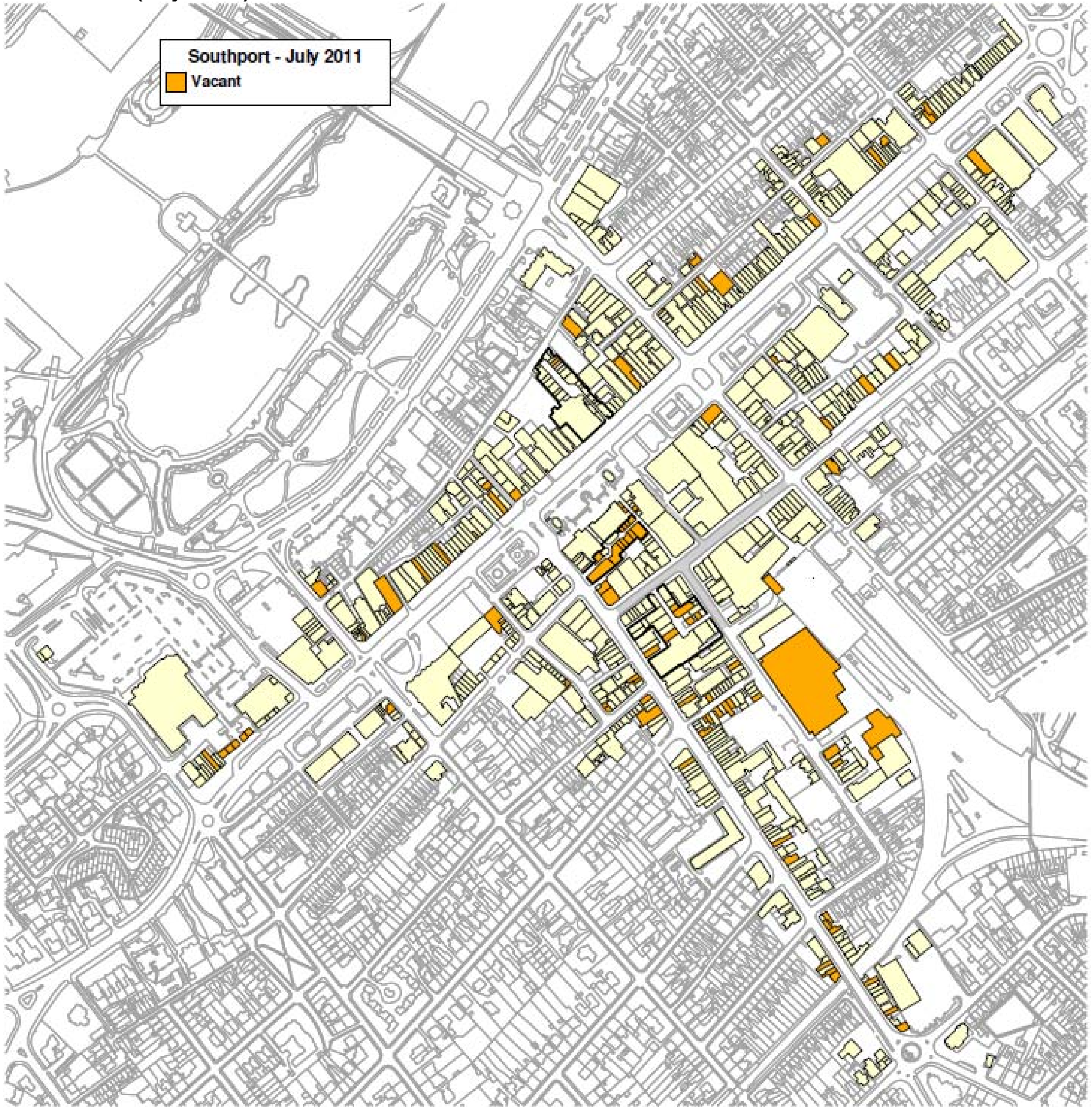
| Centre | June '03 | June '04 | June '05 | June '06 | June '07 | June '08 | June '09 |
|---|---|---|---|---|---|---|---|
| Southport | £915 | £861 | £861 | £861 | £915 | £915 | £753 |

Source: Focus Report (2011) based on Colliers CRE's assessment of open market Zone A rents

## Health Check Indicator A6 – Vacant Street-Level Property

The site visit in July 2011 found that the 102 vacant units in Southport accounted for 21,620 sq m of the total floorspace in the town centre. Both the rate of vacant outlets (13.4%) and percentage of vacant floorspace (13.9%) figures were above the national average rates of 11.8% and 9.8%. The largest vacant units are located on Tulketh Street (6,600 sq m) and Lord Street (2,250 sq m). The level of vacancies in the town centre has declined between February 2010 and July 2011, with a reduction of 8 units in terms of the number of vacancies and 5,650 sq m of vacant floorspace. The former Woolworths store on Chapel Street now accommodates a H&M, New Look and British Heart Foundation charity shop,

**Figure 8:** Vacancies in Southport Town Centre (July 2011)




Source: Site Visit (July 2011)

## Health Check Indicator A7 – Commercial Yields

The commercial yield of Southport has varied over the past decade. Commercial yields were at 6.25% in October 2000. They fell to 7% in October 2002 and remained at this level until July 2005. Commercial yields then improved to 6.25% in January 2006 and stayed at 6.25% until July 2007. However, commercial yields have increased slightly since then, which suggests a slight decrease in investor confidence in Southport town centre. However, this reflects the trend in many UK town centres since the economic downturn.

## Health Check Indicator A9 – Pedestrian Footfall

A general pedestrian flow count was recorded during the site visit to Southport in order to identify those areas of movement with a high or low pedestrian footfall. There appeared to be a strong level of pedestrian movement along Chapel Street, Eastbank Street and Lord Street, which reflects the important of the national multiple retailers in attracting shoppers to Southport town centre.

## Health Check Indicator A10 – Accessibility

**Road Access**: Southport is situated on the A565 which leads to Liverpool to the south and Preston to the north. The A570 which goes through Southport leads to Ormskirk and St Helens to the south east.

**Car parks**: There are ten council operated car parks including: Central 12 (640 spaces, owned by Aviva); Dunes Leisure Centre (173 spaces); Dunes Splashworld (113 spaces), Floral Hall (156 spaces); the Esplanade (657 marked parking bays, with additional capacity for 550 cars on the unmarked overspill section); Tulketh Street West (113 spaces); Tulketh Street East (71 spaces). There is also space for 55 coaches within the designated bays in the town centre.

**Public transport**: The town centre also benefits from good accessibility by public transport. Southport has a railway station with a service to Liverpool, Wigan, Bolton, Manchester and Rochdale. There are frequent bus services to the nearby centres of Churchtown and Formby amongst others. There is a park and ride service operational in Southport, which is especially useful when the town centre is busy. There is also a taxi rank situated off Lord Street.