Appendix 3

Southport Town Centre Health Check Assessment

Southport Town Centre Health Check Assessment

Centre Overview

Southport town centre is the principal retail, commercial and administrative centre of the Borough, with strong links to the other nearby major settlements of Preston, the centre of which is located 30km away, and Liverpool (31km), as well as the smaller neighbouring settlements of Formby (13km) and Ormskirk (13km).

Southport is the largest shopping centre in the Borough and is one of the North West's key seaside resorts. Sefton annually attracts 5.48 million visits from UK tourists, accounting for £184.5 million of expenditure.[1] The town centre serves the role as both a key shopping location for the local community and as a major destination for tourists and day visitors throughout the year. The Draft Sefton Local Plan (Publication Draft, January 2015)[2] identifies the need to secure further urban regeneration and that Bootle and Southport continue to be priorities for regeneration. The Draft Local Plan establishes that retail, leisure and other main town centre uses will be directed towards the Borough's existing centres in accordance with the retail hierarchy, with the town centres of Bootle and Southport at the top of this hierarchy of centres.

The main shopping streets within the town centre are Chapel Street, Eastbank Street and Lord Street. Chapel Street is pedestrianised and accommodates a number of national multiples occupying large format stores which include Marks & Spencer, BHS and Boots. Lord Street similarly accommodates many of the national multiple retailers present in the town centre alongside a variety of independent retailers and leisure uses. The street benefits from many examples of high quality Victorian architecture which provide for a unique shopping environment. The largest foodstore in the wider town centre area is the Morrisons store on Duke Street. Other supermarkets within the town centre boundary are the Sainsbury's on Lord Street, the Lidl on Virginia Street and the Iceland on King Street.[3] The town centre has a number of indoor malls including Marble Place Shopping Centre, Cambridge Arcade and Wayfarers Arcade. The town's market within the recently renovated Market Hall, opens six days a week, and accommodates a variety of independent retailers and retail service providers

In addition to the core commercial area in Southport, the Central 12 Shopping Park is located to the south east of the traditional shopping core, within the identified town centre boundary as set out in the Draft Sefton Local Plan. The shopping park is anchored by an Asda store, alongside 13 other retail units which are occupied by national retailers.

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[1] *Visit England: GB Day Visitor Statistics 2014*

[2] *No material changes of relevance have been made to the Local Plan between the Publication Draft (January 2015) document and the Local Plan Submission (July 2015) document.*

[3] *The Morrisons, Sainsbury's, Lidl and Iceland stores are each found in 'edge of centre' locations, outside of the Primary Shopping Area as defined by the emerging Sefton Local Plan.*

Site visits of Southport town centre were undertaken in May 2015 to enable the latest health check analysis, ensuring that the most up-to-date diversity of use and floorspace figures are available. We have utilised the centre boundary as identified by Goad for our analysis in order to consider an extensive area and to allow a direct comparison with the national average figures (which are calculated using Goad's assessment of the boundary of each centre). The Goad boundary largely corresponds with Southport's designated town centre boundary as identified in the Draft Local Plan[2], although there are some subtle differences, the main difference being that the Central 12 Shopping Park is omitted from Goad's town centre boundary. A number of areas on the outskirts of the town centre are also included within the Goad boundary, but designated outside of the Draft Local Plan town centre boundary. These include units at the northern end of Portland Street and on King Street including the Prince of Wales Hotel, premises around the junction of Nevill Street and the Promenade which include Victoria Baths and retail units on the southern side of Hoghton Street and the eastern side of London Street to the east of Southport Railway Station. A further area on the eastern side of the town which includes units on Union Street, the eastern side of Hill Street and on the southern side of Lord Street is also included within the Goad boundary but outside of the Draft Local Plan town centre boundary.

The survey information collected has been used to compare the relevant data with the national average figures and, where necessary, to identify any potential issues with the centre. WYG's survey identified that there was a total of 742 units within Goad's defined town centre boundary, comprising a total gross floorspace of 149,591 sq.m. The health check assessment considers any changes that have occurred since WYG produced Town Centre Health Checks for Southport in 2010 and, most recently, in July 2011.

Sub-Regional Shopping Hierarchy

Table 1: The Sub-Regional Shopping Hierarchy

Centre	Score (2014/15)	Location Grade	Rank (2010)	Rank (2013/14)	Rank (2014/15)	Change in Rank 2010 – 2014/15	Market Position Classification
Liverpool	569	Major City	4	5	5	+1	Upper Middle
Preston	243	Major Regional	53	60	52	-1	Middle
Blackpool	206	Regional	91	86	83	-8	Middle
Southport	**190**	**Regional**	**107**	**93**	**96**	**-11**	**Middle**
Wigan	184	Regional	101	109	108	+7	Middle
Bootle	**108**	**Sub-Regional**	**243**	**229**	**235**	**-8**	**Lower**
Ormskirk	66	Major District	372	405	437	+65	Lower Middle
Aintree Retail Park	**58**	**Major District**	**461**	**522**	**503**	**+42**	**Upper Middle**
Formby	**42**	**District**	**727**	**752**	**709**	**-18**	**Middle**
Southport Central 12 Shopping Park	**31**	**Minor District**	**941**	**1,061**	**989**	**+48**	**Middle**
Maghull	**29**	**Minor District**	**986**	**1,061**	**1,061**	**+75**	**Lower Middle**
Crosby	**23**	**Minor District**	**1,183**	**1,155**	**1,313**	**-130**	**Lower Middle**
Kew Retail Park	**21**	**Minor District**	**1,493**	**1,383**	**1,406**	**-87**	**Middle**
Aintree	**20**	**Minor District**	**1,306**	**1,452**	**1,468**	**+162**	**Lower**
Waterloo	**19**	**Local**	**1,414**	**1,524**	**1,531**	**+117**	**Lower Middle**
Meols Cop Retail Park	**18**	**Local**	**1,493**	**1,383**	**1,599**	**+106**	**Lower Middle**
Ocean Plaza Shopping Park	**17**	**Local**	**1,499**	**1,452**	**1,680**	**+181**	**Middle**

Source: Venuescore 2014-15

Venuescore ranks each centre in accordance with the number of national multiples and anchor stores, as well as units within the food service, convenience and comparison sectors. The score attached to each operator is weighted to reflect the overall impact on shopping patterns. Southport town centre has a Venuescore of 190 and is ranked 96th in the country, with the centre's rank improving by 11 places from the 107th position it occupied in the 2010 rankings. This time period has seen the town centre's Venuescore increase by 11 points. More recently, over the last 12 months, the town centre's rank has declined very slightly by three places, from a high of 93rd in 2013/14. Southport is the highest ranking centre in the Sefton local authority area and is identified as the only Regional centre in the Borough indicating its importance. The town centre ranks between the other neighbouring Regional centres of Blackpool (83rd) and Wigan (108th).

Southport Town Centre

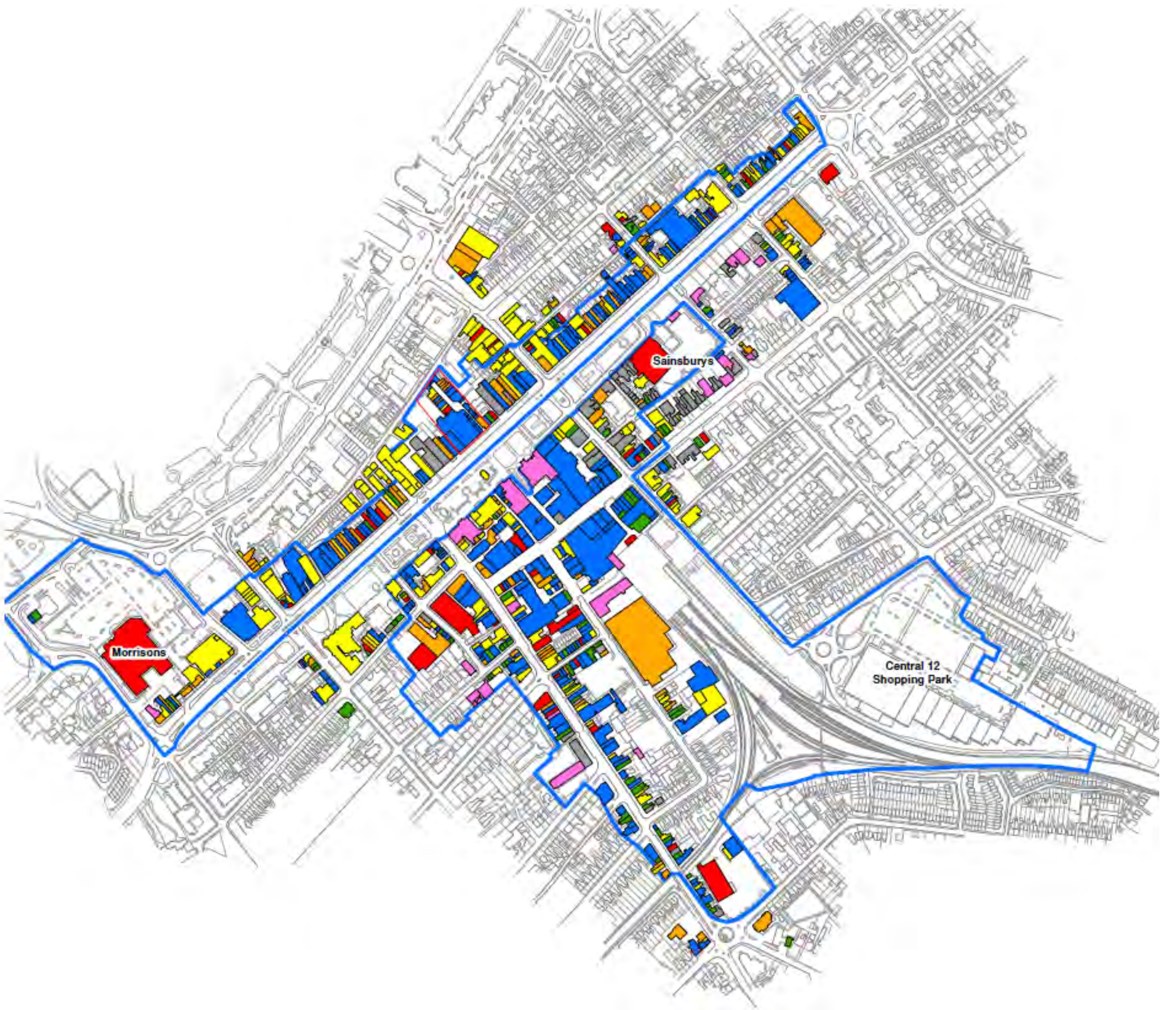
Photographs of Southport Town Centre (May 2015)

Photograph (top left): Entrance to Southport railway station, Chapel Street
Photograph (top centre): Pedestrianised area of Chapel Street
Photograph (top right): Wayfarers Arcade, Lord Street

Photograph (bottom left): Pedestrian environment, Lord Street
Photograph (bottom centre): Covered walkway of Cambridge Arcade
Photograph (bottom right): Bus stop and retail units, Eastbank Street

Diversity of Main Town Centre Uses

Diversity of Uses in Southport Town Centre (May 2015)



Wayfarers Arcade, First Floor

Diversity of Uses

- Convenience
- Comparison
- Leisure Service
- Retail Service
- Financial & Business Services
- Other Main Town Centre Use
- Vacant
- Draft PolicyED2: Town Centres Boundary
- Wayfarers Arcade

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Diversity of Main Town Centre Uses

Table 2: Units in Southport Town Centre at February 2010

	Number of Outlets		
	No	Southport TC	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**	**100.0%**	**100.0%**

Source: Experian Goad Report updated by WYG site visit (February 2010)
UK average from the Experian Goad Category Report (February 2010)

Table 3: Floorspace in Southport Town Centre at February 2010

	Floorspace		
	Sq m	Southport TC	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**	**100.0%**	**100.0%**

Source: Experian Goad Report updated by WYG site visit (February 2010)
UK average from the Experian Goad Category Report (February 2010)

Table 4: Units in Southport town centre at July 2011

	Number of Units		
	No.	Southport TC	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 Service	64	8.4%	11.0%
Vacant	102	13.4%	11.8%
Total	**760**	**100.0%**	**100.0%**

Source: Experian Goad Report updated by WYG site visit (July 2011)
UK average from the Experian Goad Category Report (July 2011)

Table 5: Floorspace in Southport town centre at July 2011

	Floorspace		
	Sq.m	Southport TC	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 Service	11,600	7.3%	8.4%
Vacant	21,620	13.6%	9.8%
Total	**159,420**	**100.0%**	**100.0%**

Source: Experian Goad Report updated by WYG site visit (July 2011)
UK average from the Experian Goad Category Report (July 2011)

Table 6: Units in Southport town centre at May 2015

	Number of Units		
	No.	Southport TC	UK
Convenience	48	6.5%	8.5%
Comparison	265	35.7%	32.4%
Retail Service	89	12.0%	14.2%
Leisure Service	178	24.0%	22.5%
Financial and Business Service	65	8.8%	10.8%
Vacant	97	13.1%	11.4%
Total	**742**	**100.0%**	**100.0%**

Source: WYG site visit (May 2015).
UK average from the Experian Goad Category Report (April 2015)

Table 7: Floorspace in Southport town centre at May 2015

	Floorspace		
	Sq.m	Southport TC	UK
Convenience	16,930	11.3%	15.1%
Comparison	57,120	38.2%	36.1%
Retail Service	7,116	4.8%	7.4%
Leisure Service	35,717	23.9%	23.3%
Financial and Business Service	10,292	6.9%	8.2%
Vacant	22,416	15.0%	9.2%
Total	**149,591**	**100.0%**	**100.0%**

Source: WYG site visit (May 2015).
UK average from Experian Goad Category Report (April 2015)

All figures based on Experian Goad town centre boundaries. WYG's 2015 floorspace figures have been calculated directly from OS data. Figures for 2010 and 2011 have been calculated from Experian Goad reports. The change in methodology adopted results in a difference to the total identified floorspace between the latest survey and those of previous years.

Diversity of Main Town Centre Uses

Convenience Goods Units

Southport is considered to be well represented in terms of convenience provision given the town centre's standing in the retail hierarchy and its key role as a comparison goods shopping destination within the region. The town centre currently has 48 convenience units, within the Goad town centre boundary, representing 6.5% of all units and 11.3% of the town centre's total floorspace. This level of provision is found to be below the national averages for convenience retail (8.5% of outlets and 15.1% of town centre floorspace). However, the Asda store at the Central 12 Shopping Park is not included in the diversity of use figures recorded as a result of the park's location outside the Goad town centre boundary area. The inclusion of this store, which provides 6,407 sq.m of floorspace and is located within the town centre boundary identified by the Publication Draft Sefton Local Plan[2], would increase the convenience provision to 15.0% of the town centre's total floorspace, just shy of the national average. Comparing the latest diversity of uses data to WYG's healthcheck in 2011, the number of convenience outlets has reduced by two units, with the level of floorspace recorded to have increased by 240 sq.m.

National supermarket brands retain a strong presence in the town centre. Other than the Asda store at the Central 12 Shopping Park, supermarkets within the wider town centre boundary include Morrisons (Duke Street, 5,485 sq.m), Sainsburys (Lord Street, 2,323 sq.m), Lidl (Virginia Street, 1,411 sq.m) and Iceland (King Street, 884 sq.m). There are also a number of other national convenience traders occupying smaller units within the town centre, including Tesco Express, Thorntons and Holland & Barrett. The town's popular indoor market, located on King Street/Market street occupies the refurbished Market Hall building which provides in the manner of 25 stalls. Further outdoor markets are frequently held on Chapel Street and King Street, offering accommodation for independents and new businesses.

Comparison Goods Units

Comparison retailers represent 35.7% of the retail outlets within Southport town centre, which is above the national average of 32.4%. With respect to floorspace, the 265 comparison outlets occupy 38.2% of the town centre's total floorspace, which similarly is above the national average of 36.1%. The number of comparison outlets has been found to have decreased by 10 units since 2011 from 275 units to 265 units, with a resultant decrease in comparison floorspace of 1,840 sq.m. This can be partly accounted for by an increase in the number of retail service outlets within the town centre, which mirrors the trend nationally, as well as an increase in the level of vacant floorspace. Notwithstanding this, Southport retains a substantial comparison retail offering, particularly along Lord Street and Chapel Street.

Chapel Street provides a location for many of the major national retailers, with a number of the town centre's largest stores found on this street including Marks & Spencer (3,688 sq.m), H&M/New Look (2,514 sq.m), Boots (1,462 sq.m) and BHS (1,307 sq.m). Lord Street offers a range of higher order shops such as jewellers and fashion outlets, again alongside a number of larger stores such as Beales Department Stores (2,942), Debenhams (2,000 sq.m), and B&M Bargains (1,597 sq.m). Other concentrations of comparison retailers are found along Eastbank Street and Wesley Street. The indoor malls of Wayfarers Arcade and Cambridge Arcade provide important facilities for independent traders, providing a range of small retail units (many of which between 30 and 100 sq.m), alongside some larger retail premises.

Retail Services

Southport town centre currently has 89 retail service units, which comprise 12.0% of the total number of outlets. The town centre has been found to have gained seven retail service outlets since 2011. The amount of retail service floorspace, however, has decreased since 2011 from 9,660 sq.m to 7,116 sq.m and now represents 4.8% of the total commercial floorspace. The proportion of outlets and the extent of floorspace in use by retail service providers are both below the respective national averages of 14.2% and 7.4%. However, a higher number of retail service providers are now trading compared to that recorded in 2011.

The retail service units are mainly small in size, with the vast majority being smaller than 120 sq.m. The most common types of retail service operator are within the health and beauty sector, which accounts for 67.4% of retail service units. Other retail services outside this sector include travel agents, opticians, drycleaners, and the Post Office.

Leisure Services

Southport is well represented in terms of the amount of leisure service units and floorspace, a reflection of the town's role as a destination for tourists and day visitors. Leisure service uses include food and beverage businesses such as restaurants, cafes, public houses and fast food take-aways as well as other service provisions such as betting shops and hotels. The town centre has 178 leisure service outlets, which represent 24.0% of the total number of units. This is above the national average of 22.5%. With respect to the extent of floorspace, leisure uses account for 23.9% of the town centre's total provision, which is again marginally above the average found nationally of 23.3%. Despite this strong provision, the town centre's leisure offer has contracted since 2011, with nine fewer units and a reduction in the proportion of floorspace dedicated to leisure uses. The latest healthcheck indicates that within the town centre, the number of leisure service outlets has returned to a level comparable to that recorded in 2010, when 179 outlets were identified. Compared to 2011, the latest diversity of uses data identifies a reduction in leisure floorspace of 3,443 sq.m within the Goad town centre boundary (although this can be partly accounted for by WYG change in recording methodology for the 2015 survey).

Despite a drop in leisure provision being recorded since 2011, significant investment in this sector has been secured in recent years. Notable developments include the new Genting Casino which opened in May 2013 as part of the £30 million Waterfront development on The Promenade; the £2 million refurbishment of the former Carlton Hotel building on Lord Street to include Eighty Eight Bar, which opened in December 2013, and the Vincent Hotel, also on Lord Street, which opened in 2008.

In terms of location, leisure service uses are distributed across the town centre although concentrations exist on Coronation Walk, Scarisbrick Avenue, Waverley Street and Nevill Street, which each lead towards the Promenade to the north of the town centre. It is considered that there is scope to improve the pedestrian links between the promenade and the leisure uses found on the northern edges of the town centre. In total, the town centre was recorded as having 43 cafes, 42 restaurants, 36 public houses or bars, 31 fast food and take away units and seven bingo or amusement halls, as well as a night club and two theatres. These leisure businesses are complemented by four hotels within the Goad town centre boundary, as well as the Ramada Plaza Hotel located just outside the Goad boundary area to the north.

Financial and Business Services

Southport has 65 financial and business service units, which comprise 8.8% of the total number of units. This is below the national average of 10.8%. The same pattern is seen in terms of the amount of financial and business service floorspace, which currently comprise 10,292 sq.m of floorspace and accounts for 6.9% of the town centre's total floorspace, below that of the national average of 8.2%. Comparing previous health check surveys for the town, the number of financial and business units has remained largely static since 2010, with the latest survey indicating a rise of one unit since 2011.

Businesses within the property services sector, which includes estate agents, comprise the highest number of financial and business service operators, accounting for 25 units. In addition, there are also nine businesses offering financial services, nine businesses offering legal services, eight retail banks and three employment and careers agencies. Financial and business service businesses are heavily focused towards the north eastern side of the town centre around London Street, Houghton Street and the southern side of Lord Street. Other national operators, such as Santander (Chapel Street), HSBC (Lord Street) and Barclays (Lord Street), occupy more central locations.

Non-Retail Units

In addition to the retail offering within Southport, other key uses provided within the town centre include the Atkinson Centre with its library, performance and exhibition space, four religious buildings, community premises and 16 office buildings.

Proportion of Vacant Street Level Property

In May 2015, there were 97 vacant units present in Southport town centre, which account for 13.1% of the total number of units. This is above the national average of 11.4%. The vacant units comprise 22,416 sq.m of floorspace, which is 15.0% of the total amount of town centre floorspace, above the national average of 9.2%.

The largest vacant retail space is found at the ground floor units of the Tulketh Street multi-storey car park (6,697 sq.m), which was also vacant at the time of WYG's last survey in July 2011. Removing this long term vacant property from the diversity of uses floorspace survey data would result in the quantum of vacant floorspace within the town centre dropping from 15.0% of the total floorspace to 11.0%. With this unit removed from the analysis, Southport's vacancy rate is more comparable to the national rate of 9.2%. The three attached vacant units of 176, 178-180 and 182 Lord Street found at the north-eastern extremity of the town centre represent the second largest extent of vacant floorspace within the town centre. Together these three units amount to 2,477 sq.m of floorspace. The largest of the three units is 182 Lord Street, the former Grand Casino building, which is 2,006 sq.m in size. Other significant vacant floorspace is identified at the former

YMCA unit on King Street (1,121 sq.m) and multiple units ranging from between 22 sq.m and 180 sq.m within Wayfarers Arcade. As well as shop unit vacancies, there are a number of vacant stalls within Southport Market. The market provides approximately 25 stalls and counters. At the time of WYG's visit to the market there were eight vacant stalls, largely located towards the rear of the Market Hall building.

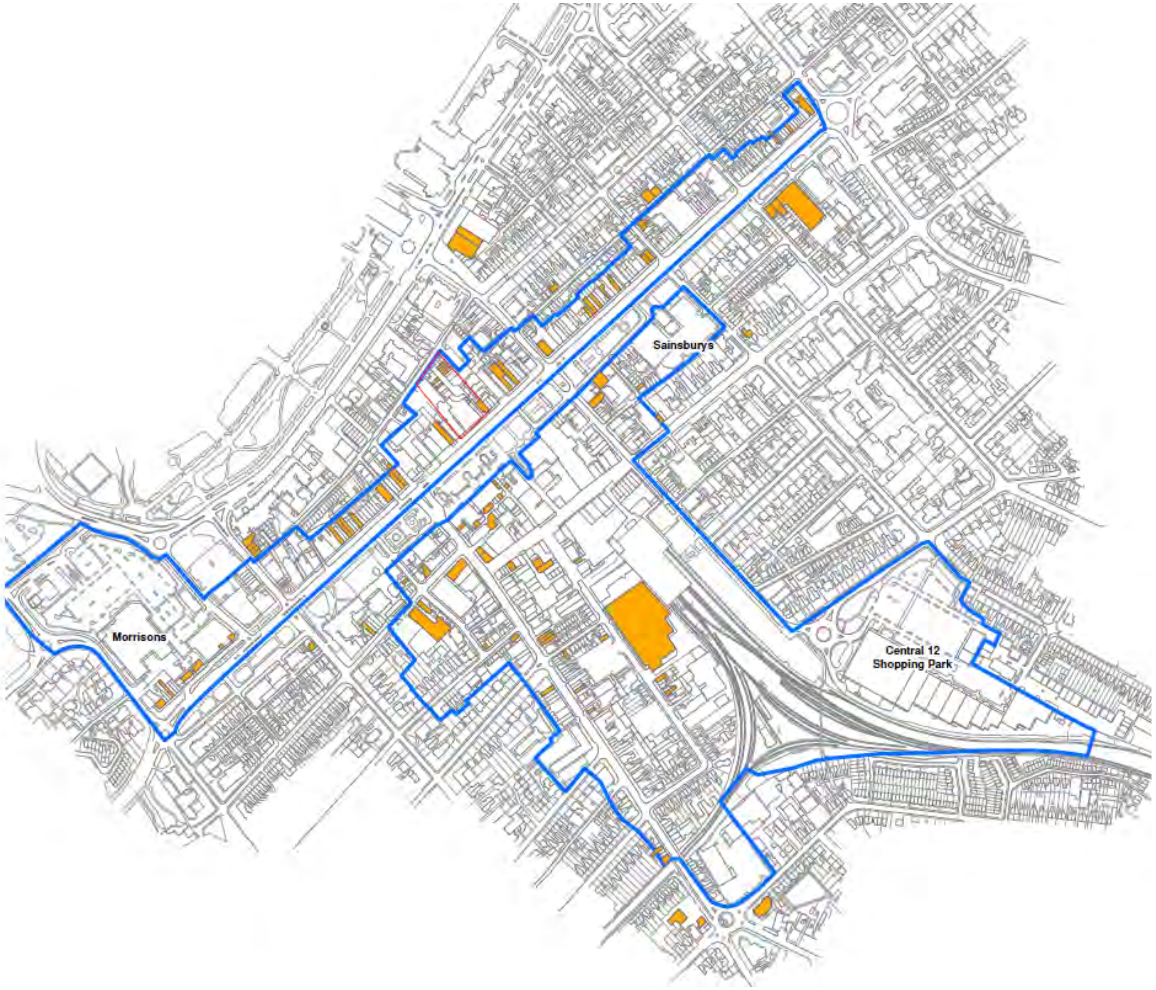
With 97 vacant units, the vacancy rate within the town centre is above the national average. However, the position appears to have improved over recent years, with 102 vacant units recorded in 2011, and 110 vacant units in 2010. The total amount of vacant floorspace is greater, by 796 sq.m, than in 2011, although the total is 4,854 sq.m less than recorded by WYG in 2010. Vacant floorspace currently represents 15.0% of the town centre's overall stock, which represents a decrease from the figure of 17.1% recorded in 2010, identifying an improvement over the last five years.

It was noted during WYG site survey that a number of the vacant units within the town centre had either recently been refurbished or were in the process of being refurbished. Similarly, it was evident that a number of vacancies had resulted from businesses recently relocating to alternative premises within the town centre. As such, it is considered that vacancy levels have the potential to improve over the coming 12 months.

Photograph (left): Refurbished vacant units, Coronation Walk
Photograph (centre): Vacant ground floor units at Tulketh Street multi-storey car park
Photograph (right): Building under refurbishment with ground floor vacant units, King Street adjacent to Market Hall

Proportion of Vacant Street Level Property

Plan of vacant properties Southport town centre (May 2015)



Wayfarers Arcade, First Floor

Key

- Vacancies -First Floor Level
- Draft PolicyED2: Town Centres Boundary
- Wayfarers Arcade

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Retailer Representation and Intentions to Change Representation

Multiple retailers, such as Boots, Marks & Spencer and Primark, can act as anchor tenants in a centre and can add to its appeal and create additional pedestrian footfall. Experian Goad produces a list of the top comparison retailers, which acts as a measure of the vitality and viability of a centre. As shown in Table 1, Southport contains 21 of the top 27 retailers within the Goad town centre boundary, (it should be noted that Phones 4U entered administration in September 2014). A further four of the top 27 retailers are located at the Central 12 Shopping Park. The prevalence of national retailers in Southport illustrates the importance of the centre to both residents of the Borough and retailers alike.

Alongside a strong presence of national multiple retailers and service providers, independent retailers make an important contribution to the town centre offer. Independent retailers help to provide a wide range of products and services and add variety and unique qualities to the shopping provision. It is noted that although markets, as a whole, are classified as a single convenience unit, Southport Market has in the region of 17 independent traders offering a broad range of goods and services, including cafes, a florist, a butchers, a green grocers, a barbers, shoe repairs and clothing stalls. These traders are not accounted for within the total number of units recorded in the town centre diversity of use figures.

A review of the recent planning applications in Southport utilising data held by EGi has found no large developments presently planned in Southport town centre.

Several planning applications for changes at Meols Cop Retail Park have been submitted in recent years. Currently an application for a new supermarket at Meols Cop Retail Park (reference DC/2014/00887), to be occupied by Sainsbury's and totalling 10,942 sq.m, has been 'called-in' for determination by the Secretary of State. Planning permission for a change of use to the Halfords unit (1B) from Sui Generis to Class A1 along with the subdivision of the unit into two separate units and the creation of mezzanine floors was granted in July 2013 (reference S/2013/0619). Further applications for the construction of mezzanine floors within units 4 (reference S/2011/0637) and 6 (reference S/2009/0671) were granted in 2011. An application to extend the existing Aldi store at the retail park was also granted in April 2014 (reference DC/2014/0045).

Table 8: Experian Goad list of Major Comparison Retailers

Retailer	In town centre?
Argos	Yes
BHS	Yes
Boots the Chemist	Yes
Burton	No
Carphone Warehouse	Yes
Clarks	Yes
Clintons	Yes
Debenhams	Yes
Dorothy Perkins	No
H&M	Yes
HMV	Yes
House of Frasier	No
John Lewis	No
Marks & Spencer	Yes
New Look	Yes
Next	Yes
O2	Yes
Phones 4U	No
Primark	Yes
River Island	Yes
Superdrug	Yes
TK Maxx	Yes
Topman	No
Topshop	No
Vodafone	Yes
Waterstones	Yes
WHSmith	Yes
Wilkinsons	Yes

Source: WYG site visit, May 2015

Market Indicators

To help assess the state of the retail property market within Southport town centre, a review of retail units currently being marketed has been undertaken. The views of property agents working within the town have also been gained to help inform a view on the latest market climate.

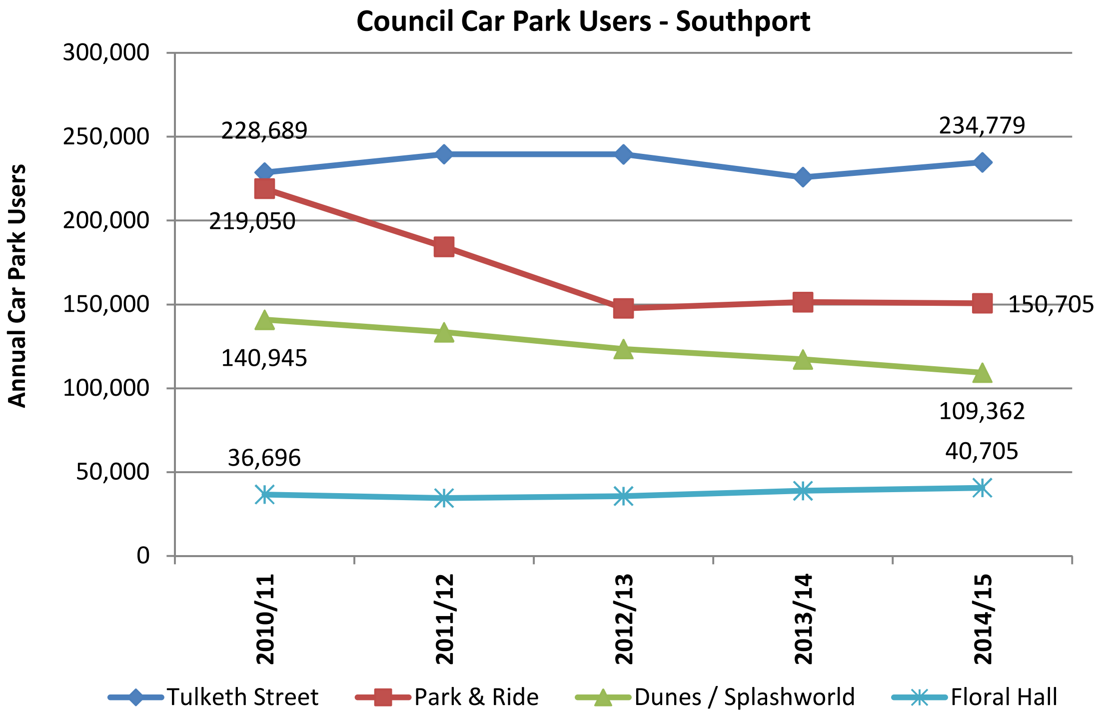
Through conversations with letting agents, it is evident that potential tenants are seeking to take short-term tenancies to test the market. Rental values have declined over recent years as a result of the challenging economic climate. This trend has been felt across the town centre, and is common to both prime and more secondary retail locations.

Historic data available from the Valuation's Office Agency for commercial yield values identified that in 2008 retail properties in Southport were achieving on average yields of 6.5%. Analysis of current retail units available on the market and insight from agents indicates that yield values have increased from this time and now typically range from between 7% and 11% dependent on the location and specifics of the unit. Feedback received from local agents has been that Zone A rental values are generally not of relevance for benchmarking purposes in Southport, given the varied composition of units and the inherent differences present in the character of the town's shopping streets.

Business rates are evidently a key concern for potential retail occupants, representing a major cost to businesses. A review of available units has found business rates payable in the town in some cases to be approaching the level of annual rental costs.

Pedestrian Flows

Data has been provided by Sefton Council on the number of users using Council operated car parks both in and on the edge of Southport town centre. This data has helped to establish both the popularity of the respective parking facilities and as to from which direction visitors are entering the town centre after parking. The graph below illustrates that the Park and Ride, Dunes/Splashworld and Floral Hall car parks to the north of the town centre have dropped in popularity since 2010/11, with the Park and Ride car park experiencing the greatest reduction in annual users, falling by 68,345 between 2010/11 and 2014/15. The surface car parking on Tulketh Road, south of the main shopping activity, is the only car parking facility of those for which data is available which has recorded an increase in annual users between 2010/11 and 2014/15, increasing by 6,090 over this time. This is in line with WYG's site observations which found Tulketh Street to be a popular parking destination, providing two surface car parks alongside the multi-storey facility managed by Euro Car Parks.



On-street pay and display car parking spaces within the town centre provides an important source of parking and revenue. The total annual recorded users of on-street pay-and-display parking is identified within the Council's data as surpassing the combined number of users using the Tulketh Street, Park & Ride, Dunes/Splashworld and Floral Hall car parks in 2014/15. On-street pay-and-display parking attracted 901,377 users in 2014/15 compared to 535,551 users of the Council operated car parks analysed above. The high numbers of visitors using on-street parking indicates that shoppers like the convenience this provides and the opportunities provided to park in alternative locations outside of the town's main car parks.

Springboard data identifies that the town centre attracted footfall of 1,034,632 in the month of May 2015, which represented an increase of 0.7% on the same month in 2014 but a decrease of 2.9% on May 2013. In 2014 Southport experienced a fall in footfall of 3.6% across the year, compared to a fall of 0.9% on average across the UK as a whole.

Springboard data recorded footfall on Chapel Street of 190,439 for May 2015, an increase of 5,522 (+2.9%) from the same month in 2014, but a decrease of 6,900 (-3.5%) on May 2013. Springboard records significantly lower levels of footfall on Lord Street compared to Chapel Street. For May 2015 footfall on Lord Street was recorded as 68,219. This represents a decrease of 3,790 (-5.3%) from May 2014 but a lesser decrease on footfall recorded for May 2013 of 848 (-1.2%).

Generally, Southport is considered to have reasonably high overall levels of pedestrian activity, as witnessed at the times of WYG's visits to the centre. The busiest locations were found to be the principal shopping streets of Chapel Street, Lord Street, Eastbank Street and King Street, reflecting the importance of the national multiple retailers in attracting shoppers to the town. North of Lord Street towards the promenade, footfall was observed to be more limited. Footfall within the town centre diminishes towards the western and eastern ends of Lord Street and at the southern end of Eastbank Street.

Good levels of pedestrian activity were observed around the Market Hall. During WYG's visits to the locality, it appeared that the food offering within the market in the shape of the cafes, food outlets and traders selling fresh produce, along with the provision of indoor and outdoor seating opportunities, helps to drive footfall in this area.

The number of pedestrians travelling along London Street between the Central 12 Shopping Park and the principal shopping environment around Chapel Street was observed to be modest. The distance between these two shopping locations, although only amounting to approximately a five minute walk, along with the relatively limited shopping offer along London Street, appears to limit the willingness of shoppers to visit both locations in a single trip to the centre, at least on foot.

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 and leads to the M58 which is found 24 kilometres to the south of the town. Traffic along the A565 and the A570 were not found to be problematic or restricting to access at the times of WYG's visits to the centre.

Car Parking: The town centre is served by significant number of car parks, which together provide a quantum of car parking which is considered generally capable of meeting demand on a day-to-day basis. However, a number of the car parks are not ideally located to provide users convenient access to the heart the town centre. There are ten Council operated car parks in and around the town centre which include The Central 12 Shopping Park (640 spaces), the Esplanade (657 marked bays with additional capacity for 550 cars on the unmarked overspill section), Tulketh Street West (100 spaces), Tulketh Street East (70 spaces), Dunes Leisure Centre (173 spaces), Dunes Splashworld (113 spaces) and Floral Hall (156 spaces). There is also space for 55 coaches within the designated bays in the town centre.

Additionally, privately run car parks within the town centre include the multi-storey facility on Tulketh Street, the NCP car park to the east of the railway station on London Street, surface car parking accessed from the Promenade and further surface car parking at the rear of Wayfarers Arcade on West Street. Car parks at the Morrisons (550 spaces), Sainsbury's (150 spaces) and Lidl (120 spaces) supermarkets provide further parking opportunities, although these facilities are limited to short stays and in the case of the Sainsbury's and Lidl car parks are limited to store customers only.

The majority of the car parks operate a pay and display system, with parking charges varying considerably. The popular surface car parks on Tulketh Street provide parking for two hours for £1.40 and four hours for £2.80. A number of other car parks serving the town centre are similarly priced. The multi-storey car park on Tulketh Street managed by Euro Car Parks offers long stay parking with 12 hours priced at £3.90. Additionally, all day parking is offered for £2.25 with entry before 11.00am Monday to Saturday and for £1.00 on Sundays. The NCP car park alongside the railway station generally has higher charges, with two hours being £4.80 and up to four hours being £6.80, although all day parking is offered for £2.50 for users arriving before 9.30am.

The Central 12 car park limits stays to a maximum of three hours, which does not help to encourage longer stays for visitors or trips into other areas of the town centre. Despite this, the parking charges are considered competitive being £0.40 for one hour, £1.40 for two hours and £2.00 for three hours. On-street pay-and-display parking within the town centre, which performs an important role in meeting parking needs charges £0.70 for 30 minutes, £1.40 for one hour and £2.80 for the maximum stay of two hours.

Based on recent similar health check surveys undertaken by WYG, we consider that the Council managed car parking charges are slightly cheaper than found at other town centres which serve a similar shopping role, with 2 hours typically found to cost around £2.00 and 4 hours to cost between £3.50 and £4.00. Free parking is commonly available at out of centre retail parks, such as is the case at the Ocean Plaza Retail Park.

A park and ride service is in operation from the Eco Visitor Centre. Buses run every 10 minutes with a charge of £1.50 per car. Car parking data provided by the Council shows that users of the Esplanade park and ride car park have decreased by 31.2% between 2010/11 and 2014/15, although it is noted that since 2012/2013 user numbers have remained relatively static.

Public Transport: Southport's railway station is ideally located to provide access to the centre of the town's shopping area, with the main entrance and exit located on Chapel Street. Direct services are provided to the major key regional destinations of Liverpool, Manchester (and Manchester Airport), Wigan and Bolton as well as important more closely located centres such as Birkdale, Ainsdale, Formby and Bootle. Prices for a return ticket to these centres typically range from between £3.75 to £11.60 dependent on the length of journey. Although well located, the covered entrance way into the railway station is not particularly inviting, being a rather dark space without an outlook onto the surrounding area.

Frequent bus services to Preston, as well as the neighbouring local centres of Birkdale, Ainsdale and Churchtown and Formby district centre are available. Although there is no centralised bus interchange, many of the key bus services can be conveniently accessed from bus stops on Eastbank Street and Lord Street. On Eastbank Street, 13 bus services can be accessed with 21 services accessible from Lord Street. Bus shelters in the most part are relatively new and well maintained.

Walking, Cycling and Disabled Access: Southport has been granted 'Cycling Town' status and has benefited from financial investment from the Department for Transport's Local Sustainability Transport Fund in recent years to develop cycling infrastructure. It is considered that further opportunities exist to help improve accessibility for cyclists on the road network in and around the town centre. Bicycles can be hired at both the Southport Railway Station and from the Eco Visitor Centre. A sizeable cycle storage facility is provided at Southport Railway Station, with capacity for 162 bicycles. As well as this, Sheffield stands are located across the town in a number of visible and conveniently positioned places. Relatively modest traffic speeds on the highway network along the key routes into the town centre provide a conducive environment to enable access by bicycle.

Pedestrian access within the main shopping area is generally good, without suffering from significant problems relating to traffic interference. There can be considered to be two main core shopping areas, these being the shops around Chapel Street and East Bank Street and the shops along the northern side of Lord Street. Well positioned pelican crossing points allow pedestrians to navigate across Lord Street and Eastbank Street without too much difficulty.

Canopies over shop frontages on Lord Street, as well as a number of indoor shopping arcades within the town centre, both provide opportunities for shelter for visitors whilst they undertake their shopping. The footways within the shopping area are generally of a good standard. The pedestrianised Chapel Street, as well as Lord Street with its wide pavements, both provide suitable environments for shoppers to browse at their leisure. It is considered that there are ample formal and informal seating opportunities for shoppers.

During WYG's site visits we noted that footfall at the far western and eastern ends of Lord Street reduces greatly, with shops in these locations somewhat detached from the main activity associated to the town centre, due to their peripheral location. Similarly, pedestrian travel between the Central 12 Shopping Park and Chapel Street was observed to be relatively modest.

Disabled access within the town centre is generally of a good standard. There are dedicated disabled parking bays within many of the cars parks. The spacious footways along Chapel Street and Lord Street are beneficial to disabled visitor access. It was observed that the majority of retail units have level access, with relatively few stores trading on more than one floor.

Perception of Safety and Occurrence of Crime

Crime statistics provide a monthly snapshot of incidents of crime within the North Sefton neighbourhood area as identified by Merseyside Police. This neighbourhood area encompasses Southport town centre and the surrounding local area, extending to cover Churchtown to the north and Hillside to the south.

Table 9: Incidents of Crime, North Sefton Neighbourhood

Month	Incidents of Crime by Category										
	ASB	Burglary	Robbery	Vehicle	Violent	Drugs	Criminal Damage & Arson	Shoplifting	Theft	Other	Total
April 2015	228	36	7	25	108	27	51	53	69	23	627
April 2013	201	49	0	35	48	18	48	46	61	12	518
April 2011	292	48	1	14	45	205					605

Source: www.ukcrimestats.com

The highest proportion of incidents of crime in the North Sefton Neighbourhood consistently relate to anti-social behaviour (ASB), accounting for 36.4% of incidents in April 2015. This is a smaller proportion than recorded for across the Merseyside Police area as a whole, in which 42.6% of incidents in April were categorised as relating to ASB. Incidences of violent crime have been found to have experienced the greatest increase within the North Sefton neighbourhood since April 2011. Incidents of violent crime which occurred within the town centre in April 2015 were in the most part located in areas north of Lord Street, where much of the town centre's evening/night time economy is based. Overall, monthly incidents of crime within the North Sefton Neighbourhood have remained relatively consistent since

2011.

Southport town centre is considered to generally provide an environment which feels safe and secure for visitors. The main shopping areas benefit from healthy levels of pedestrian activity and active retail frontages, with good levels of natural surveillance. The open public realm spaces on Lord Street, complemented by well maintained planting schemes and street furniture help to give the impression of a well cared for town centre.

Few visible signs of anti-social activity such as vandalism or heavy-duty crime prevention measures were found to be apparent in the town. CCTV cameras are located across the town covering areas with high levels of activity. These measures help to provide a deterrent to criminal activity. Public realm spaces, particularly along Lord Street are of a very high quality, helping to convey a sense of safety.

The railway station entrance walkway, which is an enclosed and relatively narrow space does not provide the best environmental conditions to offer a sense of security and safety to visitors. During busy times of the day, the entrance and exits from the railway station benefit from high levels of footfall and consequently natural surveillance is provided by passing pedestrians, however, at quieter times it is considered that perceptions of safety are likely to be less positive.

The Southport Business Improvement District (BID) manages a crime prevention resource which draws on collective involvement from local businesses. The 'Southport Business Against Crime' initiative is an information sharing service which works to reduce low-level crime and anti-social behaviour and helps to improve security in the town through the collaboration of local businesses.

State of Town Centre Environmental Quality

WYG's site visits found the town centre environment to generally be of a good quality. The highest quality areas in terms of the town centre's physical environment are found along Lord Street. The Victorian facades found on Lord Street are complemented by the green open spaces on the southern side of the highway, which provide attractive spaces for sitting and rest. The municipal buildings on the southern side of the street further complement the qualities of the area. The tree lined 'boulevard' character of Lord Street is a unique quality of Southport which is evidently well cared for and managed. The indoor shopping malls of Wayfarers Arcade and Cambridge Arcade are other examples of facilities which offer interest and character to the town centre.

The traditional canopies found above many shop units on Lord Street are known to be an ongoing issue for the Council and the BID. Their upkeep and maintenance, which is the responsibility of the individual owners and occupiers, is considered to vary in standard. In some cases, the canopies are of poor quality, which in turn detracts from the street scene. The quality of the signage at shop units on Lord Street is also perceived to be an issue for the Council in seeking to provide a high-quality shopping and leisure environment. The two Conservation Areas found within the town centre (Lord Street and Promenade) are presently both considered to be at risk, a reflection of the physical challenges being faced in these two areas.

The pedestrian Chapel Street offers a more typical high street environment, with modern shop fronts. The public realm of this street is well maintained with planting, street furniture and lighting evidently upgraded in recent years. It is considered that the main entrance/exit to the railway station could be improved to the benefit of the environmental quality of the area.

The Market Hall provides good quality modern premises for Southport Market. Footfall attracted by the market as well as on street activity created by outdoor seating space on Market Street contributes to the vitality of the area. Market Street has also benefited from improvement works to the public footways. Along Eastbank Street the town centre's environment is less inviting to pedestrians by virtue of narrower pavements and the presence of regular passing traffic, including regular buses.

It is considered that there are relatively few examples of poor quality retail units which detract from the town centre's environmental quality, although notable exceptions include sizable vacant premises at the multi-storey car park on Tulketh Street, the former Victoria Indoor Baths on The Promenade and the former Grand Casino building on Lord Street.

Conclusions

Southport town centre is the principal retail, commercial and administrative centre within the Sefton local authority area. Our assessment of the town centre has found its health to be generally good. There are 742 units within the identified Goad town centre boundary which together occupy 149,591 sq.m of floorspace. The town centre has a strong comparison and leisure service offer, considered to be a reflection of its importance as a key shopping location and as a popular destination for tourists. The extent of convenience floorspace within the town centre is below that of the national average, however, it is considered that there is a relatively strong offering in place, with Morrisons, Sainsbury's, and Aldi supermarkets all operating, as well as an Asda superstore within the Central 12 Shopping Park.

The vacancy rate is above the national average, both in terms of a proportion of the town centre's retail outlets and as proportion of the centre's total retail floorspace. Notwithstanding this, the centre provides a wide ranging retail, leisure and service offering, with 20 out of 27 of Experian Goad's top multiple retailers found within the Goad town centre boundary. Southport is consequently classified by Venuescore as a Regional centre indicating its importance within the wider area.

For the most part, the town centre receives high level of pedestrian activity. Footfall was found to be weaker at the western and eastern ends of Lord Street and the southern end of Eastbank Street. The number of pedestrians travelling between the principal shopping area around Chapel Street and the Central 12 Shopping Park along London Street were observed to be relatively few in number.

The town centre is well connected to the strategic road network, with both the A570 and A565 passing through the town. Southport has car parks of varying sizes distributed around the town centre which overall are considered fit for purpose and relatively competitively priced. Rail links from Southport are strong, with direct trains to many of the surrounding settlements and the major towns and cities available. In terms of accessibility for cyclists, parking provision is excellent, with the road network not considered to be restricting to promoting travel by bicycle.

The quality of the town centre environment promotes a strong sense of safety and security at most locations. The distinct historic built environment and pleasant public realm as a result of previous programmes of investment which is found along Lord Street provides unique qualities and character to the town. Away from Lord Street, the town centre environment remains generally of a good quality, with isolated examples of buildings which detract from the physical qualities of the town. However, we note that the maintenance of historic canopies above units, particularly along Lord Street, is mixed and in some instances very poor, presenting an ongoing issue for the BID and the Council which is still to be addressed. We also note that both of the town centre's Conservation Areas are considered to be 'at risk'.

A review of recent and current planning applications indicates that there are few new schemes of note planned within the town centre. However, signs of recent investment at existing premises were observed within the centre, with a number of retail premises having been either recently renovated or in the process of being renovated at the time of WYG's visits.

Appendix 4

Bootle Town Centre Health Check Assessment

Bootle Town Centre Health Check Assessment

Centre Overview

Bootle town centre is the second largest retail, commercial and administrative centre within the Sefton. The town is particularly well connected to Liverpool, being just 5.6km to the north of the city, and linked by a direct rail route. The smaller neighbouring settlements of Crosby (6.8km), Kirkby (8.7km) and Maghull (8.7km) are found to the north of the town. Aintree Shopping Park[1], located 5.8Km to the north east of the town accommodates a number of national multiple retailers.

The town centre serves the role of an important shopping destination within the southern half of the Borough, for both convenience and comparison goods, as well as for providing access to retail and non-retail services. The Draft Sefton Local Plan (Publication Draft, January 2015) identifies the need to secure further urban regeneration and that Bootle and Southport continue to be priorities for regeneration. The Draft Local Plan establishes that retail, leisure and other main town centre uses will be directed towards the Borough's existing centres in accordance with the retail hierarchy, with the town centres of Bootle and Southport at the top of this hierarchy of centres.

The town centre is focused around the New Strand Shopping Centre. The centre was opened in 1968 and subsequently extended in 1999. The indoor shopping environment incorporates retail units of various sizes across ground and lower ground floors, tenanted by a range of both national multiples and independent retailers. The shopping centre was purchased in October 2014 by Ellandi, who are progressing with development plans to revitalise areas of the shopping centre and bring in new retailers.

Further to the shopping facilities located within the Strand, retail units are also found along Stanley Road which runs alongside the eastern side of the shopping centre. The convenience shopping offer within the town centre is provided by the large Asda store on Strand Road, the Iceland store within the Strand and a Lidl store found on Stanley Road. This is in addition to the Aldi store (which is outside the Goad town centre boundary) on Hornby Road.

A site visit to Bootle town centre was undertaken on Thursday 28th May 2015 to enable the latest health check analysis, ensuring that the most up-to-date diversity of use and floorspace figures are available. We have utilised the centre boundary as identified by Goad for our analysis in order to consider an extensive area and to allow a direct comparison with the national average figures (which are calculated using Goad's assessment of the boundary of each centre). The Goad town centre boundary encompasses a wider area than that of the town centre boundary set out in the Draft Local Plan. The Goad boundary additionally includes the Asda store and Stella Nova development on the western side of the centre, a terrace of retail units on the eastern side of Stanley Road north of Marsh Lane, units on the western side of Stanley Road north of the Strand and buildings on both sides of Stanley Road south of the canal crossing which include Bootle Library and Castle Bingo.

[1] For the purposes of this report Aintree Shopping Park is considered to comprise both Aintree Retail Park and the Racecourse Retail Park.

The survey information collected has been used to compare the relevant data with the national average figures and, where necessary, to identify any potential issues within the centre. WYG's survey identified that there was a total of 204 units within Goad's defined town centre boundary, comprising a total gross floorspace of 51,751 sq.m. The health check assessment considers any changes that have occurred since WYG's previous surveys of the town centre in April 2009 and July 2011 which informed the subsequent health check assessments produced.

Sub-Regional Shopping Hierarchy

Table 1: The Sub-Regional Shopping Hierarchy

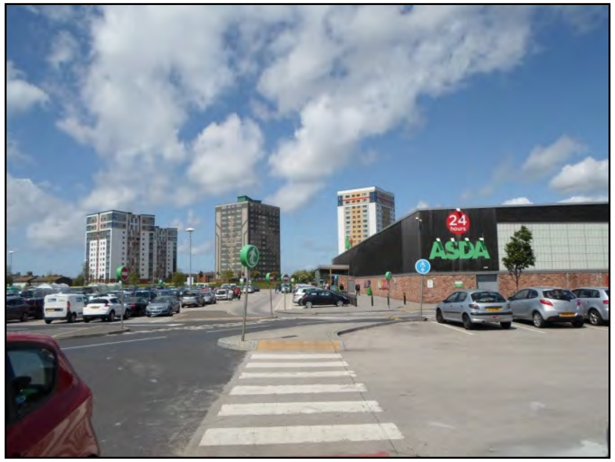
Centre	Score (2014/15)	Location Grade	Rank (2010)	Rank (2013/14)	Rank (2014/15)	Change in Rank 2010 – 2014/15	Market Position Classification
Liverpool	569	Major City	4	5	5	+1	Upper Middle
Preston	243	Major Regional	53	60	52	-1	Middle
Blackpool	206	Regional	91	86	83	-8	Middle
Southport	**190**	**Regional**	**107**	**93**	**96**	**-11**	**Middle**
Wigan	184	Regional	101	109	108	+7	Middle
Bootle	**108**	**Sub-Regional**	**243**	**229**	**235**	**-8**	**Lower**
Ormskirk	66	Major District	372	405	437	+65	Lower Middle
Aintree Retail Park	**58**	**Major District**	**461**	**522**	**503**	**+42**	**Upper Middle**
Formby	**42**	**District**	**727**	**752**	**709**	**-18**	**Middle**
Southport Central 12 Shopping Park	**31**	**Minor District**	**941**	**1,061**	**989**	**+48**	**Middle**
Maghull	**29**	**Minor District**	**986**	**1,061**	**1,061**	**+75**	**Lower Middle**
Crosby	**23**	**Minor District**	**1,183**	**1,155**	**1,313**	**-130**	**Lower Middle**
Kew Retail Park	**21**	**Minor District**	**1,493**	**1,383**	**1,406**	**-87**	**Middle**
Aintree	**20**	**Minor District**	**1,306**	**1,452**	**1,468**	**+162**	**Lower**
Waterloo	**19**	**Local**	**1,414**	**1,524**	**1,531**	**+117**	**Lower Middle**
Meols Cop Retail Park	**18**	**Local**	**1,493**	**1,383**	**1,599**	**+106**	**Lower Middle**
Ocean Plaza Shopping Park	**17**	**Local**	**1,499**	**1,452**	**1,680**	**+181**	**Middle**

Source: Venuescore 2014-15

Venuescore ranks the UK's top 3,000 retail destinations in accordance with the number of national multiples and anchor stores, as well as units within the food service, convenience and comparison sectors. The score attached to each operator is weighted to reflect the overall impact on shopping patterns. Within the latest rankings Bootle town centre records a Venuescore of 108 points providing the centre a rank of 235th in the country. This represents an improved ranking position of 8 places from the centre's previous ranking of 243rd back in 2010. This time period has seen the town centre's Venuescore increase by 25 points. Bootle is the second highest ranking centre in the Sefton local authority area and is identified as the only Sub-Regional centre in the district, graded below only Southport, which provides an indication of the centre's role and importance.

Bootle Town Centre

Photographs of Bootle Town Centre (May 2015)

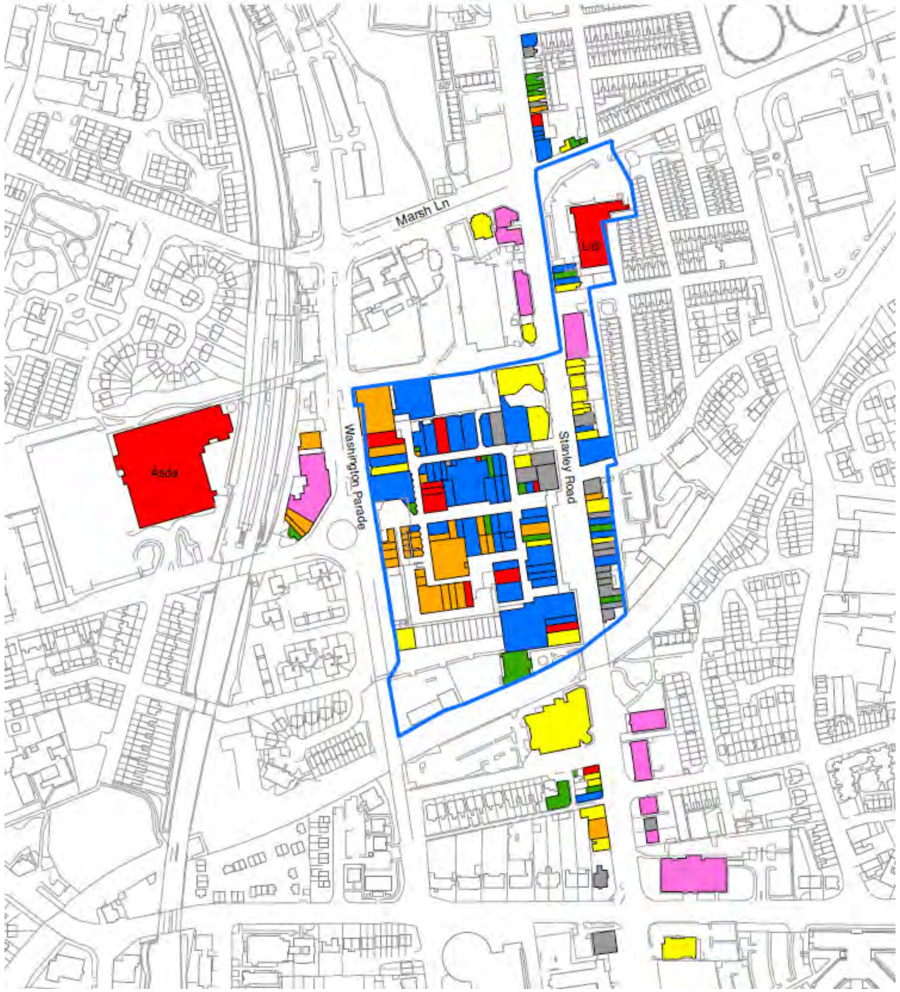


Photograph (top left): Stanley Road entrance to the Strand
Photograph (top centre): Washington Parade entrance to the Strand
Photograph (top right): Shop units on Stanley Road

Photograph (bottom left): Bus stations on Stanley Road
Photograph (bottom centre): Bootle Bus Station
Photograph (bottom right): Asda supermarket, Strand Road

Diversity of Main Town Centre Uses

Diversity of Uses in Bootle Town Centre (May 2015)



The Strand, Lower Ground Level

Diversity of Uses

- Convenience
- Comparison
- Leisure Service
- Retail Service
- Financial & Business Services
- Other Main Town Centre Use
- Vacant
- Draft Policy ED2: Town Centre Boundary

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Diversity of Main Town Centre Uses

Table 2: Units in Bootle Town Centre (April 2009)

Number of Outlets			
	No	Bootle TC	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**	**100.0%**	**100.0%**

Source: Experian Goad Report updated by WYG site visit (April 2009)
UK average from the Experian Goad Category Report (April 2009)

Table 3: Floorspace in Bootle Town Centre (April 2009)

Floorspace			
	Sq m	Bootle TC	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**	**100.0%**	**100.0%**

Source: Experian Goad Report updated by WYG site visit (April 2009)
UK average from the Experian Goad Category Report (April 2009)

Table 4: Units in Bootle Town Centre (July 2011)

Number of Units			
	No.	Bootle TC	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**	**100.0%**	**100.0%**

Source: Experian Goad Report updated by WYG site visit (July 2011)
UK average from the Experian Goad Category Report (July 2011)

Table 5: Floorspace in Bootle Town Centre (July 2011)

Floorspace			
	Sq.m	Bootle TC	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**	**100.0%**	**100.0%**

Source: Experian Goad Report updated by WYG site visit (July 2011)
UK average from the Experian Goad Category Report (July 2011)

Table 6: Units in Bootle Town Centre (May 2015)

Number of Units			
	No.	Bootle TC	UK
Convenience	19	9.3%	8.5%
Comparison	62	30.4%	32.4%
Retail Service	21	10.3%	14.2%
Leisure Service	31	15.2%	22.5%
Financial and Business Service	24	11.8%	10.8%
Vacant	47	23.0%	11.4%
Total	**204**	**100.0%**	**100.0%**

Source: WYG site visit (May 2015).
UK average from the Experian Goad Category Report (April 2015)

Table 7: Floorspace in Bootle Town Centre (May 2015)

Floorspace			
	Sq.m	Bootle TC	UK
Convenience	11,873	22.9%	15.1%
Comparison	17,175	33.2%	36.1%
Retail Service	2,731	5.3%	7.4%
Leisure Service	8,198	15.8%	23.3%
Financial and Business Service	3,714	7.2%	8.2%
Vacant	8,060	15.6%	9.2%
Total	**51,751**	**100.0%**	**100.0%**

Source: WYG site visit (May 2015).
UK average from Experian Goad Category Report (April 2015)

All figures based on Experian Goad town centre boundaries. WYG's 2015 floorspace figures have been calculated directly from OS data. Figures for 2009 and 2011 have been calculated from Experian Goad reports. The change in methodology adopted can results in a disparity in the total identified floorspace between the latest survey and those of previous years.

Diversity of Main Town Centre Uses

WYG's latest diversity of uses survey identifies that the total town centre floorspace has increased by an additional 7,701 sq.m since the previous survey was undertaken in July 2011. This is largely as a result of changes to the Goad town centre boundary and the development of some additional units within the town centre.

Principally, for WYG's health check assessment made in July 2011 the Asda store on Strand Road was identified as outside the Goad town centre boundary and therefore was not included within the previous diversity of uses floorspace figures. The inclusion of this store within the town centre's floorspace analysis for the latest health check assessment largely accounts for the increases recorded to both the overall and convenience floorspace totals since 2011. Additional retail units within the town centre are also now in operation as part of the Stella Nova development on Washington Parade and within Mainland House on Stanley Road.

Convenience Good Units

Bootle is currently well represented in terms of convenience shopping provision, with four major supermarket retailers having stores either within or on the edge of the town centre. The town centre currently has 19 convenience units within the Goad town centre boundary, representing 9.3% of all units and 22.9% of the total town centre floorspace. This level of provision is above the national average as provided by Goad which is for 8.5% of outlets and 15.1% of town centre floorspace to be occupied by convenience retailers. Since 2011 a net reduction of two convenience units has occurred.

The largest supermarket within the centre is the Asda superstore on Strand Road. This store, which opened in 2008, provides 6,882 sq.m of floorspace and benefits from its own sizable car park. Although somewhat separated from the main shopping activity within the Strand and along Stanley Road, the store is now identified within Goad's town centre boundary and as such is incorporated within the diversity of use figures for WYG's latest survey. It is noted that the store is not within the town centre boundary as identified within the Publication Draft of the Sefton Local Plan. Omitting this store from the town centre's latest diversity of uses survey to allow a comparison with previous health check surveys identifies that convenience floorspace has dropped from 6,290 sq.m in 2011 to 4,991 sq.m in 2015, a net reduction of 1,299 sq.m. This can be accounted for by the closure of the Tesco Metro store from within the Strand, which previously provided 1,210 sq.m of floorspace. The closure of this store was announced as part of the retailer's 43 planned store closures which were made public in January 2015.

Other major supermarket retailers present include Iceland within the Strand (781 sq.m) and Lidl on Stanley Road (1,619 sq.m). The M&S Outlet store within the Strand also has a food department in store. The edge of centre Aldi store on Hornby Road which is identified outside both the Goad town centre boundary and the town centre boundary as set out in the Publication Draft of the Local Plan, is a short walk from the Strand, and consequently may also attract linked trips into the centre. Other national convenience traders occupying smaller units within the town centre include Cooltrader, Heron and Greggs alongside a number of independent convenience retailers.

Comparison Good Units

Comparison retailers represent 30.4% of the retail outlets within Bootle town centre. This is below the national average of 32.4%. In terms of floorspace, comparison retailers occupy 33.2% of the town centre's total floorspace, which is again below the national average of 36.1%. Comparison goods retailing is identified as the sector which has experienced the largest decline when compared to the previous health check surveys undertaken by WYG. It is noted that the significant increase in both the town centre's total floorspace and convenience floorspace as a result of the Asda store's inclusion in the latest diversity of uses data results in a knock-on effect in respect to the centre's proportional percentage of comparison floorspace reducing from that recorded in 2011. Despite this, in comparing the latest survey to that undertaken in 2011, the number of comparison outlets has reduced by 13 units from 75 to 62. Over the same time period, the amount of comparison floorspace has contracted by 1,195 sq.m from 18,370 sq.m in 2011 to 17,175 sq.m in 2015. It is considered that this reduction has occurred due to a loss of comparison retailers from the Strand such as TJ Hughes and a number of independent comparison retailers in combination with an increased offering within the leisure service sector.

The largest comparison units within Bootle are occupied by Marks & Spencer (2,024 sq.m), B&M Bargins (1,146 sq.m), and Wilkinson (1,095 sq.m). Further national comparison retailers within the Strand include fashion retailers such as Peacocks and New Look as well as other major high street names such as Argos, Boots and Superdrug.

It is understood that TJ Hughes, who previously occupied a unit on Mariners Way in the Strand, has agreed to take tenancy of a sizable unit within the shopping centre. This would return a further key anchor retailer to the Strand.

Retail Services

Retail service uses incorporate a wide range of businesses such as hairdressers, beauty salons, opticians and post offices alongside many other specialist services which are typically found on the high street. Bootle town centre currently has 21 retail service units, which comprise 10.3% of the town centre's outlets. Since 2011 the centre has experienced a net loss of one retail service unit, with the amount of floorspace within this sector reducing by 489 sq.m from 3,220 sq.m in 2011 to 2,731 sq.m in 2015, now accounting for 5.3% of the centre's total commercial floorspace. The proportion of outlets and the extent of floorspace in use by retail service providers are both below the respective national averages of 14.2% and 7.4%. With consideration given over a longer period of time, in 2009 the centre was recorded as having 19 retail service units, two fewer than found in the latest survey, indicating that the provision in this sector has remained relatively stable over the last six years, although in the UK context this sector has been seen to have grown.

The town centre's retail service units are mainly small in size, with the vast majority being smaller than 120 sq.m. The most frequently found retail service operators within the town centre are within the health and beauty sector, which accounts for 47.6% of the retail service units. Other retail services outside this sector include two travel agents, three opticians and a post office.

Leisure Services

Leisure service uses include food and beverage businesses such as restaurants, cafes, public houses and fast food takeaways as well as other service provisions such as betting shops and hotels. Bootle's leisure service provision remains significantly below the national average, as was found to be the case in previous health check surveys in 2009 and 2011. This is as would be expected given composition of the centre, being heavily focused around the Strand scheme which retains a strong shopping focus.

Despite this, the provision in this sector has increased over time, with a net addition of two leisure units recorded between WYG's 2011 and 2015 surveys and the extent of leisure service floorspace being found to have increased from 7,120 sq.m in 2011 to 8,199 sq.m in 2015. Currently there are 31 leisure service units within the centre, compared to 29 in July 2011. The current provision represents 15.2% of the total number of retail outlets within the centre, considerably below the national average of 22.5%. In terms of floorspace, leisure outlets occupy 15.8% of the town centre's total floorspace, which is again considerably below the national average of 23.3%.

In terms of location, many of the leisure service outlets are located along Stanley Road, outside of the shopping environment of the Strand. The largest leisure service unit is the Castle Casino which occupies 2,214 sq.m of floorspace. In total, the town centre includes ten fast food & take away outlets, seven bars or public houses, five betting offices, four cafes, two bingo and amusement businesses and two restaurants.

Financial and Business Services

Bootle has 24 financial and business service units, which comprise 11.8% of the total number of units. This is above the national average of 10.8%. With respect to the extent of floorspace, this sector proportionally accounts for less floorspace than the national average, with 15.8% of the centre's total floorspace occupied by businesses in this sector compared to a national average of 23.3%.

Comparing previous health check surveys for the town, the number of financial and business units has remained largely static since 2011, with the latest survey indicating a net increase of one unit since 2011. Retail banks, financial service providers and legal service providers are the most represented types of business within the sector. Six retail banks, seven financial services business and seven legal services businesses are presently found within the centre. National multiples include HSBC, Halifax, Barclays, Natwest, Santander and Nationwide, most of which occupy prominent positions on Stanley Road.

Non-Retail Units

In addition to the retail offering within Bootle, other key services and land uses provided within the town centre include Bootle Library, a Council One Stop Shop, Sefton Magistrates Court, Job Centre Plus, a doctors surgery, two dental surgeries and a number of private office buildings.

Proportion of Vacant Street Level Property

In May 2015, there were 47 vacant units present in Bootle town centre, which account for 23.0% of the total number of units. This is currently more than double the national average of 11.4%. The vacant units comprise 8,060 sq.m of floorspace, which represents 15.6% of the total amount of town centre floorspace, which is again significantly above the national average of 9.2%.

The majority of the vacant units are located within the Strand. At the time of WYG's visit to the centre, a significant area of the shopping mall along Mariners Way leading to Mons Square was closed off, with boarding in place to prevent entry. The closure is understood to be related to plans to reconfigure the internal arrangement within this section of the mall and create a single larger retail unit (to be occupied by TJ Hughes) as proposed through planning permission DC/2015/00194, which was granted in April 2015. In total, 42 vacant units were identified within the Strand, 31 at ground floor level and a further 11 at lower ground level. Of these vacancies, 20 of the units at ground level are located along the closed section of Mariners Way, and as such, cannot be accessed. As a consequence, the vacancy rate at present is significantly influenced by the necessary closure of part of the shopping centre. Once re-opened, it is considered likely that the vacancy rate would improve following retailers returning to units in the presently closed section. Were the 20 units in the closed section of the Strand to be occupied, the vacancy rate across the town centre would improve to 13.2%, which would still be above the national average of 11.4%.

Omitting the 20 vacant units within the Strand which are presently inaccessible from the diversity of uses data for the centre as a whole identifies that 14.7% of units are currently vacant, again above the national average. Although this analysis should be considered to represent an underestimate of the level of vacancies within the town, this calculation does provide a more accurate reflection of the current picture across the centre than that of the headline vacancy rate figure of 23.0% identified within Table 6 on page 5.

With consideration given to the areas of the Strand which have remained open, the ground floor level retains a healthy occupancy rate, with nine units found to be vacant. With the exception of the larger former Tesco Metro and TJ Hughes units, these vacant units range in size from 20 sq.m to 280 sq.m. The lower ground floor level, which provides significantly fewer units than the level above, currently has a higher proportion of vacant units. Ten of the 31 units within the mall at lower ground level were found to be vacant, representing 32.3% of the units, ranging in size from 84 sq.m to 465 sq.m. Outside of the Strand, only six vacant units were identified, three of which being at the relatively new Stella Nova development on Washington Parade and a further three on Stanley Road.

Comparing the latest survey results to the 2011 survey undertaken by WYG, the number of vacancies has increased by seven units from 40 recorded in 2011 to 47 in 2015. Many of the vacancies within the Strand identified in 2011 were located along the section of Mariners Way which is currently closed. However, eight units within this section of the mall were recorded as being occupied in 2011. The full closure of this portion of the mall therefore is the major attribute to the rise in vacancies recorded since the previous survey was undertaken. Vacant floorspace is recorded as increasing from 5,250 sq.m in 8,060 sq.m in 2015, again, with the majority of this floorspace located within the closed section of the mall.

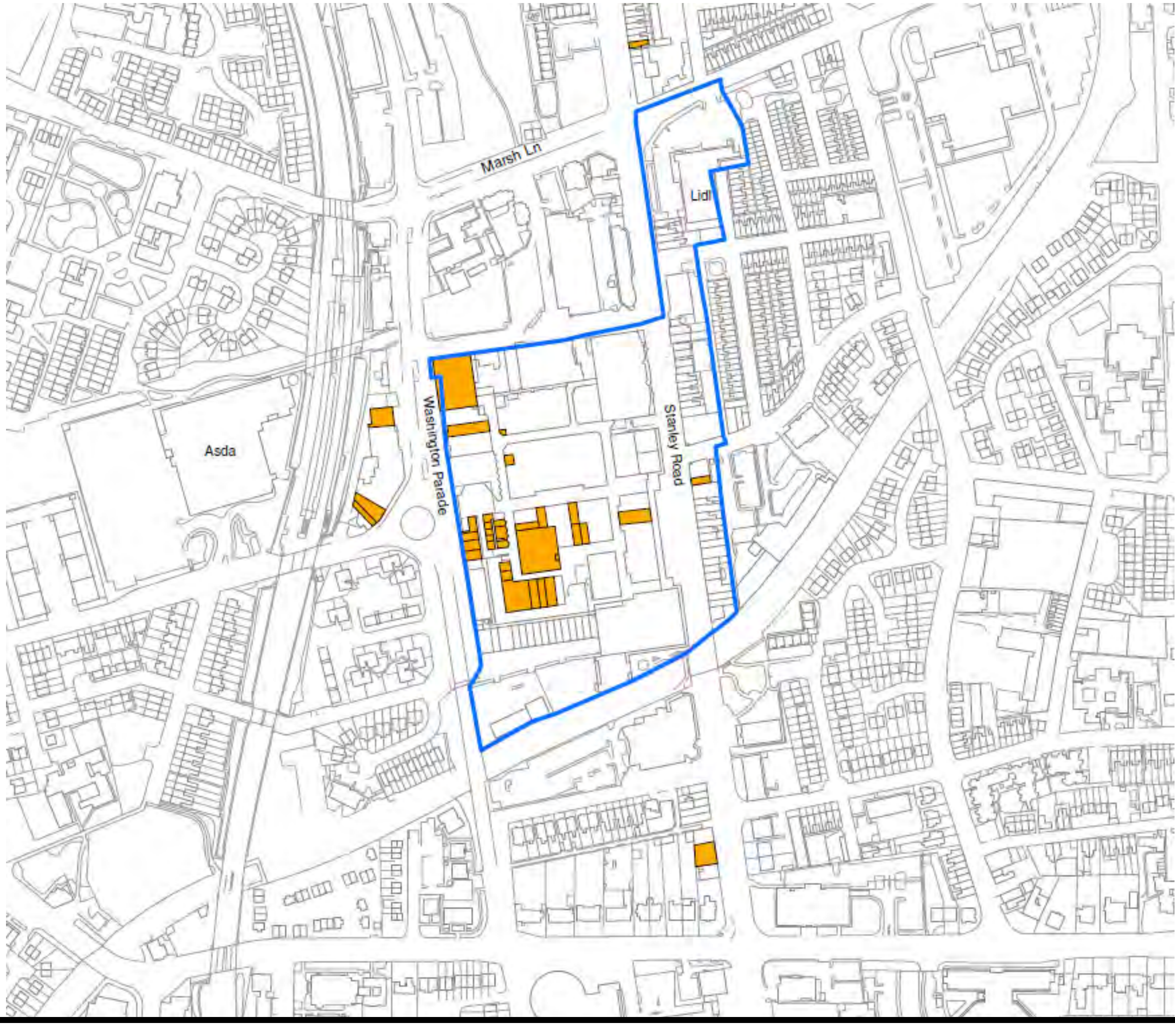
The largest vacant retail unit within the centre is the former Tesco Metro unit within the Strand, which provides 1,186 sq.m of floorspace. The second largest vacant unit is 140-147 The Strand, which was occupied by TJ Hughes at the time of WYG's 2011 survey. As mentioned, TJ Hughes are known to have recently agreed to take occupancy within the centre again. Other sizable vacant units within the centre include 122 The Strand, within the currently closed section of the mall, and 113-114 The Strand located on the lower ground level.

Overall, comparing previous surveys of the town centre undertaken in 2009 and 2011 to the findings of the latest survey, both the number of vacancies and the amount of vacant floorspace have been found to have increased progressively over the last six years. Notwithstanding this fact, the increasing extent of vacancies can be largely attributed to the management strategy being taken at the Strand to reconfigure the internal space, with a realistic probability that the situation will improve should the planned works be carried out. Outside of the Strand, vacancies in other areas of the town centre remain relatively few in number.


Photograph (left): Boarded frontage to the Strand Shopping Centre on Washington Parade
Photograph (centre): Vacant units within the Strand Shopping Centre
Photograph (right): Vacant unit, 284 Stanley Road

Proportion of Vacant Street Level Property

Plan of vacant property Bootle Town Centre (May 2015)



The Strand, Lower Ground Level

Key

Vacant

Draft Policy ED2: Town Centre Boundary

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Retailer Representation and Intentions to Change Representation

Multiple retailers, such as Boots, Marks & Spencer and Primark, can act as anchor tenants in a centre and can add to its appeal and create additional pedestrian footfall. Experian Goad produces a list of the top comparison retailers, which acts as a measure of the vitality and viability of a centre. As shown in Table 8, Bootle contains ten of the top 27 retailers within the Goad town centre boundary, (it should be noted that Phones 4 U entered administration in September 2014). All of the ten top retailers identified occupy units within the Strand. Other important national multiples such as retail banks including Halifax, Barclays, Natwest and Santander alongside a number of national supermarket retailers are also present within the centre, serving to complement the shopping offer. The presence of a considerable number of national retailers in Bootle helps to illustrate the level of importance of the centre to both the residents of the Borough and retailers alike.

Independent retailers can help to provide a wide range of products and services and add variety and unique qualities to the shopping offer of a town. Within Bootle, independent retailers are considered to be making an important contribution to the centre. However, the configuration of the centre, dominated by the Strand, dictates that independents frequently occupy more secondary locations within the centre. The town centre does not necessarily provide the best platform to encourage the growth of small independent retailers, lacking a facility such as a market area for small scale businesses to locate. The Strand's composition in generally providing larger retail spaces of between 100 sq.m and 400 sq.m is more suited to attracting more established retailers.

On 1st April 2015 planning permission was granted for the enlargement of Unit 140-147 The Strand at ground floor level to include the removal of units 105-110A, 122-125 and 148 and the closure of part of Mariners Way, as well as the creation of new entrances fronting Mons Square and Medway (reference DC/2015/00194). The proposal would create an additional 594 sq.m of retail floorspace and significantly change the mall environment. The total number of units within the Strand would be reduced and the current internal pedestrian walkway along Mariners Way to Mons Square would be removed.

Table 8: Experian Goad list of Major Comparison Retailers

Retailer	In town centre?
Argos	Yes
BHS	No
Boots the Chemist	Yes
Burton	No
Carphone Warehouse	Yes
Clarks	No
Clintons	No
Debenhams	No
Dorothy Perkins	No
H&M	No
HMV	No
House of Frasier	No
John Lewis	No
Marks & Spencer	Yes
New Look	Yes
Next	No
O2	Yes
Phones 4U	No
Primark	No
River Island	No
Superdrug	Yes
TK Maxx	No
Topman	No
Topshop	No
Vodafone	Yes
Waterstones	No
WHSmith	Yes
Wilkinsons	Yes

Source: WYG site visit, May 2015

Market Indicators

To help assess the state of the retail property market within Bootle town centre, a review of retail units currently being marketed has been undertaken. The views of property agents working within the town have also been gained to help inform a view on the latest market climate.

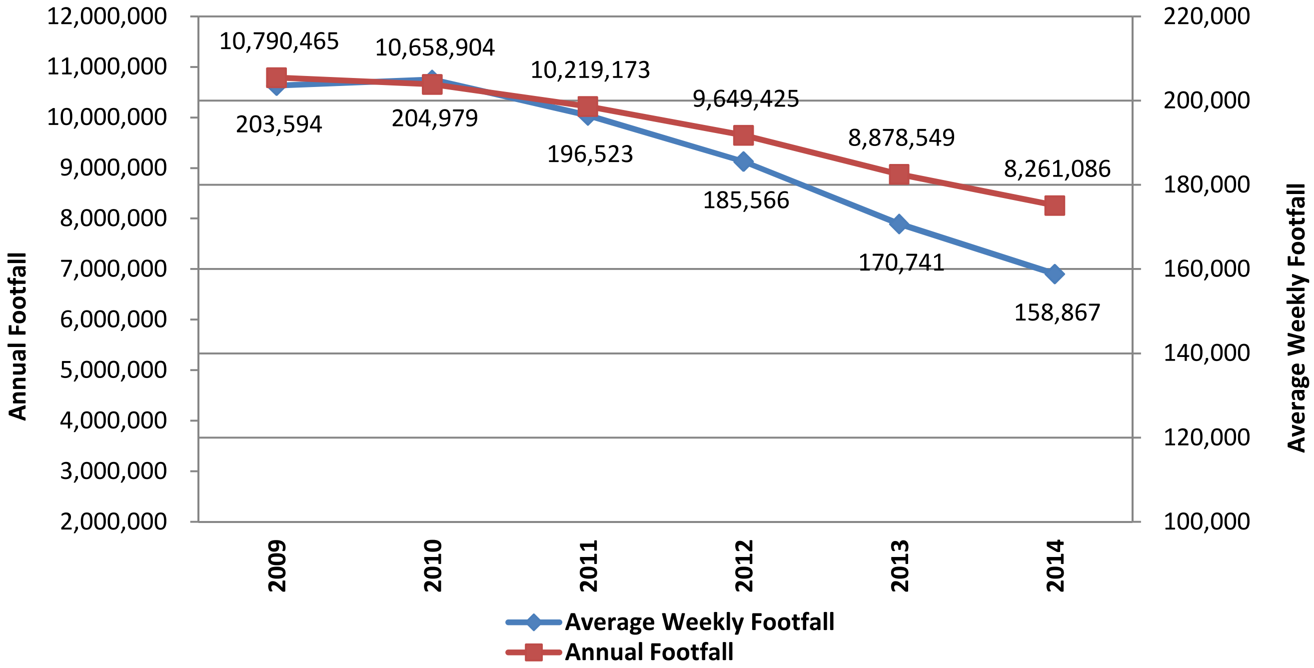
Through conversations with letting agents, it is considered that confidence levels of potential occupants is relatively weak and has not evidently improved over the last 12 months post-recession. Rental values have declined over recent years in response to the challenging wider economic climate and the financially prudent approach shown by retailers towards investment.

Historic data identifies that prime pitch Zone A rents within Bootle were estimated at 753 £/sq.m (70 £/sq.ft) between June 2005 and June 2008, declining to £646 £/sq.m (60 £/sq.ft) in June 2009.[2] Discussions with agents suggest that Zone A rental values over more recently have declined further to around 538 £/sq.m (50 £ sq/ft) and have now stabilised at this level. No reliable published data is currently available with respect to typical yield values within the town. Business rates are evidently a key concern for potential retail occupants in representing a major cost for businesses.

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

Pedestrian Flows

Footfall data has been provided by the management for the Strand. Customer footfall counts for the shopping centre identify that over the preceding six years period (2009-2014) the Strand has on average attracted 811,911 shopping visits per month, equating to a weekly average of 187,364.



The above graph illustrates that between 2009 and 2014, visitor footfall has been found to have decreased, as has the total annual visitor count for the centre. The decrease in average monthly footfall between 2009 and 2014 is recorded as 12.0%. The overall figures demonstrate that the shopping centre continues to attract very significant numbers of visitors, in excess of 8 million shopping visits per year, although this has declined from nearly 11 million visits in 2009.

Analysis of car park data shows a similar level of decline in visitor numbers. The number of vehicles recorded utilising the Strand multi-storey car park in 2012 was 321,930, with this number reducing to 259,382 in 2014, a decline of 19.4%.[3] Vehicle numbers using the Council operated multi-storey car park on Delaware Road are also recorded as declining in recent years, with 44,696 vehicles recorded in 2012/13, falling to 33,035 in 2014/15, a decline of 26.1%.[4]

At the time of WYG's visit to the centre, footfall was observed to be generally healthy within the Strand. Activity was experienced to be greatest around the main entrances on Stanley Road and along Parkside and Medway within the shopping mall. Significant numbers of visitors were also found to be entering the centre directly from the Strand's multi-storey car park. Footfall was observed to reduce on the lower ground level, with far fewer visitors entering and exiting the mall on Washington Parade than on Stanley Road. The decline in visitor activity on the lower ground level is considered to be a reflection of the limited number of national multiples on this level, coupled with a concentration of vacancies currently being found on this level.

Outside of the Strand, activity was found to be more modest, yet remaining relatively healthy along Stanley Road adjacent to the Strand, with pedestrians found to be drawn to this area to access bus services. Further away from the Strand footfall reduces sharply to the north of Vermont Way and south of the canal crossing. In the wider area, footfall on Washington Parade was observed to be low, other than for a limited number of shoppers travelling between the Asda store and the shopping centre. The Lidl store on Stanley Road is better connected to the main activity found at the Strand, lending itself to shoppers undertaking linked trips. Few shoppers were found to be travelling between the edge of centre Aldi Store and the Strand.

Accessibility

Road Access: Bootle is straddled by Washington Parade on the western side of the centre and Stanley Road to the eastern side of the centre. In the wider area, the M57 and M58 can both be reached in less than a 20 minute drive.

Road-side vehicle bays on either side of Stanley Road by the entrances to the Strand are restricted to use by buses, taxis and for loading only, meaning private vehicles seeking to drop-off shoppers are required to find alternative, less convenient locations to do so. Traffic in the area was not found to be problematic or restricting to access the centre at the time of WYG's visit between 12.00pm and 5.30pm on Thursday 28th May 2015.

[3] Source: Data provided by management for the Strand shopping centre, 2015

[4] Source: Sefton Council, 2015

Car Parking: Bootle provides a range of accessible and generally well maintained car parking options. The Strand incorporates its own multi-storey car park across 5 levels, providing 580 spaces. Alternatively, the Council operated multi-storey car park on Delaware Road provides 416 spaces. Both of these facilities are accessed via Vermont Way, which is a one-way highway. Signposting to these car parks was found to be good, with both facilities appearing to be relatively popular parking destinations and are well maintained. Additionally, a Council operated surface pay and display car park is located at Bootle Leisure Centre off Hornby Boulevard (173 spaces), as well as an NCP run car park on Merton Road (28 Spaces) and a larger privately operated car park further south of the centre accessed from Trinity Road.

The Strand multi-storey car park charges £1.50 for two hours, £2 for four hours and £7.50 for all day parking, with parking on Sundays being £1.00. The Council run multi-storey facility charges £1.00 for one hour, £1.60 for two hours, £2.90 for four hours and £4.20 for all day parking. The leisure centre car park is the cheapest facility and charges £0.50 for 1 hour, £1.00 for 2 hours, £1.80 for four hours and £4.00 for all day parking. Based on recent similar health check surveys undertaken by WYG, we consider that the charges at these facilities are slightly cheaper than found at other town centres which serve a similar shopping role, with 2 hours parking typically found to cost around £2.00 and 4 hours to cost between £3.50 and £4.00.

Further free car parking is available at the Lidl store (76 spaces), and at the Asda (circa 450 spaces) and Aldi (circa 90 spaces) stores, which are located a short walk from the Strand. Each of these car parks provide free parking for customers with stays limited to one hour at the Lidl car park and two and a half hours at the Asda car park. Each of these three car parks was found to be relatively well utilised.

Public Transport: Bootle New Stand Railway Station is very well located to provide access to the centre, being a two minute walk from entrances to the Strand on Washington Parade. Although well located for convenience, on exiting the railway station, the environment is not particularly welcoming for pedestrians who are required to cross Washington Parade to reach the Strand, which itself does not provide clear or inviting entrances on the Washington Parade frontage.

From Bootle New Strand Railway Station direct services are provided to Liverpool city centre, Southport, Ormskirk and Kirkby. Prices for a return fair to Liverpool cost in the region of £3.40, with a return fair to Southport costing £5.85. The train station itself was found to generally be appropriately maintained and free from litter, however, it is considered that signage directing users to the station could be improved.

Bus services to and from the centre can be accessed from either the designated covered bus station which forms part of the Strand, or from bus shelters located on Stanley Road. Both of these locations are within easy reach of the main shopping activity. In total, 11 separate bus services can be accessed from the covered station with 15 services accessible from Stanley Road. Together these two bus station locations provide a good coverage of services across the local surrounding area and beyond.

Walking, Cycling and Disabled Access: Cycle stands are installed on Washington Parade and at various points on Stanley Road. Further stands are also provided within the the customer car parks at the various supermarkets within the town centre. The location and number of cycle parking stands are considered suitable to appropriately meet demand. There are no cycle lanes in place on the approaching sections of Washington Parade or Stanley Road leading to the town centre. As such, access by cyclists is not actively aided or promoted in this regard.

Internally within the Strand, the covered shopping environment provides easy and convenient access to the majority of the centre's shops and services. In this location the shopping environment is easy to navigate and provides good accessibility for disabled visitors and for visitors with mobility difficulties, with level access provided to shop units. Lifts provide access from the Strand's multi-storey car park to the shopping levels.

Apart from the Strand, the majority of the shops are located along the length of Stanley Road. These units are all within relative close proximity to each other, however, the pedestrian experience is impacted by traffic passing along the highway. Pavements on Stanley Road are suitably wide and well maintained.

Accessibility for pedestrians is considered to be weakest on Washington Parade where safety barriers around the roundabout junction with Strand Road restrict the movement of pedestrians. Accessibility is not helped in this locality by the lack of active frontages along the western side of the Strand which would serve to help direct pedestrians to the entrances.

Perception of Safety and Occurrence of Crime

Crime statistics provide a monthly snapshot of incidents of crime within the South Sefton neighbourhood area as identified by Merseyside Police. This neighbourhood encompasses Bootle town centre and its surrounding area, extending north to include the surrounding local areas of Seaforth, Waterloo and Crosby. The data available therefore gives an insight into incidents of crime across this wider locality.

Table 9: Incidents of Crime, South Sefton Neighbourhood

Month	Incidents of Crime by Category										
	ASB	Burglary	Robbery	Vehicle	Violent	Drugs	Criminal Damage & Arson	Shoplifting	Theft	Other	Total
April 2015	292	58	9	47	96	28	101	42	74	19	766
April 2013	312	80	8	46	61	58	99	61	52	54	831
April 2011	473	65	9	46	77	355					1025

Source: www.ukcrimestats.com

The highest proportion of incidents of crime in the South Sefton Neighbourhood consistently relate to anti-social behaviour (ASB), accounting for 38.1% of incidents in April 2015. This is a smaller proportion than recorded for across the Merseyside Police area as a whole, in which 42.6% of incidents in April were categorised as relating to ASB. Incidences of violent crime have been found to have experienced an increase within the South Sefton neighbourhood since April 2011. An analysis of the locations of recorded incidents of violent crime within the South Sefton Neighbourhood suggests that Bootle town centre is not a specific hot-spot for this type of crime, with the recorded occurrences of such incidents found to distributed widely across the neighbourhood area. Incidents of theft are recorded as rising since April 2013. However, the number of crimes relating to thefts is recorded as fluctuating significantly between months during this two year time period. The monthly figures available show that shoplifting is generally found to be the most recorded type of crime within the town centre area.

Internally within the Strand, the environment provides a good perception of safety for shoppers, with a visible presence of security and management staff. Outside of the shopping centre on Stanley Road there continues to be a healthy level of pedestrian activity, with natural surveillance provided by both shoppers and from glazed retail frontages to shop units found on the eastern side of the road.

There is considerably less footfall along Washington Parade and as such perceptions of user safety are likely to be considerably lower, particularly during evening hours. The physical environment on Washington Parade is less engaging to pedestrians and with less activity occurring in this locality the area feels cut off from the activity occurring within the Strand and along Stanley Road. Pelican crossing points provide a safe route across Washington Parade for pedestrians moving between the Strand and the railway station or Asda store.

The town centre area was generally found to be free from signs of anti-social activity such as vandalism or graffiti. CCTV cameras are located internally with the Strand as well as at locations on Stanley Road, at Bootle bus station and at the Bootle New Strand Railway Station. These measures help to provide a deterrent to criminal activity. The creation of an improved frontage to the Strand on Washington Parade would help to encourage activity in this location and engender a stronger sense of safety.

State of Town Centre Environmental Quality

The Strand development is largely inward facing, which to some extent provides a disconnection with the other surrounding town centre uses. The main entrances to the Strand on Stanley Road are clearly identifiable and provide links between the centre and the high street environment outside of this entrance. The other entrance points are less clearly identifiable, particularly those on Washington Parade, and consequently could be improved to promote greater integration with the surrounding environment.

In a similar regard, the shopping centre does not provide active retail frontages on to either Stanley Road or Washington Parade. On Stanley Road, the majority of shop units which form part of the Strand were found to no longer provide an entrance point from the street. Instead units permanently retain security shutters in place or have screening applied to the inside of shop glazing, with access to the shops only available from within the shopping centre. This design approach means that the street scene is not provided with any animation normally associated with glazed shop frontages along shopping streets and the associated positive interaction with pedestrians. This lack of an active frontage is continued on Washington Parade where sections of the shopping centre's frontage were found to be boarded-up and not complementary to the visual amenity of the surroundings.

Internally, the Strand is suitably light and clean, providing a pleasant shopping environment. The centre appears to be relatively well maintained with modern shop frontages. The environmental quality of the shopping centre was found to be weakest on the lower ground floor level where empty and vacant units were most evident.

The bus station within the Strand, although suitably maintained, is not a particularly welcoming space for passengers to await bus serves. The partly enclosed station environment is disconnected from the main shopping activity with the public realm largely lacking any interest for users.

Away from the Strand, shop units on Stanley Road were generally found to be fit for purpose and maintained in a fair condition. At the northern extent of the town centre to the north of Marsh Lane, a minority of the shop units on Stanley Road were found to detract from the visual amenity of the area. This was as a consequence of units either being in need of physical improvement works or through an over-abundance of signage and advertisements being installed.

Across the town centre a number of modern developments are evident which have served to improve the environmental quality within the town centre over recent years. Notable examples include the Stella Nova development and the Council's One Stop Shop building. Public realm and landscaping improvements have also been secured through the development of the Asda store. The planting scheme adopted along Stanley Road is also beneficial to the public realm on this street.

Conclusions

Bootle town centre is the second largest retail, commercial and administrative centre within the Borough. The town centre performs an important role in providing for the convenience and comparison shopping needs of the local resident population in the south of the Borough, as well as being a key location to access a wide range of services. The centre accommodates ten out of 27 of Experian Goad's top multiple retailers and is classified by Venuescore as a sub-regional centre, indicating its importance within the wider area.

Our assessment has found that the town centre has largely retained the shopping offer found to be in place at the time of WYG's last survey of centre in July 2011, although some signs of decline have been found. The centre is considered to be currently in the process of significant change through planned changes at the Strand shopping centre. Planning permission was granted in April 2015 (reference DC/2015/00194) for a reconfiguration of units within part of the mall at ground floor level which would significantly change the internal dynamic of the shopping centre.

There are 204 units within the identified Goad town centre boundary, which together occupy 51,751 sq.m of floorspace. Total floorspace within the town centre is recorded as increasing by 7,701 sq.m since the previous survey of July 2011, largely attributed to the inclusion of the Asda store on Strand Road being included in the latest figures which itself amounts to 6,882 sq.m of floorspace. Overall, the town centre is well represented in terms of its convenience shopping offer, with a number of the major supermarket retailers represented.

The latest diversity of uses figures show that the centre has experienced a decline in its comparison shopping offer when compared to the situation recorded in 2009 and 2011. WYG's latest survey shows a loss of 13 comparison units against the total recorded in 2011 and a subsequent reduction in comparison goods floorspace across the town centre of 1,195 sq.m. The number of comparison outlets and the proportion of comparison floorspace within the centre remain below the Goad national average. Changes proposed to reconfigure the internal arrangement at the Strand means that part of the shopping centre remains closed. In total, 20 units in this section of the shopping centre were recorded as being vacant in WYG's survey, resulting in a significant increase in vacant floorspace.

Footfall within the Strand has been found to have declined significantly over recent years. Data from customer counters at the Strand show a decrease of 12.0% in average monthly footfall between 2009 and 2014, although the shopping centre still attracts in excess of 8 million shopping visits annually. Rental values are also thought to have reduced since the last health check of the centre was completed in 2011, with prime Zone A rents identified as reducing by as much as 30% since 2008.

Parking provision within the town centre is considered to be good, with a number of Council and private run facilities available at various price points. The internal shopping area of the Strand provides a pleasant shopping environment for visitors. However, the shopping centre's external frontages could be improved to relate more positively with the wider area and improve activity along the street scenes of Stanley Road and Washington Parade.