



Sefton Council

Sefton Retail Strategy Review 2015

Final Report

October 2015

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1.0 Introduction

Instruction

- 1.01 WYG Planning (hereafter referred to as 'WYG') was commissioned by Sefton Council ('the Council') in September 2015 to undertake an update of the Sefton Retail Strategy Review (RSR). This study is to provide a comprehensive update of the Sefton RSR published in 2012 that informed the Local Plan (Part 1).
- 1.02 A key purpose of this Study is to provide an assessment of retail needs and capacity in the period to 2030, and to review the current performance of Southport, Bootle town centres as well as consideration of the performance of the Borough network of four district centres, but also take into account the results of the Local Centres and Parades Study prepared in 2012. The Study will act as the evidence base to assist in the formulation of future development plan policy, as well as providing baseline information to assist in the determination of planning applications for retail development. The Study also provides recommendations in respect to the Council's future strategy for Southport and Bootle town centres in order to help safeguard their future vitality and viability.
- 1.03 The Study draws upon new empirical research, with NEMS Market Research Limited (NEMS) undertaking surveys of 1,000 households within the defined Study Area in September 2015. The Study Area for the household survey comprises the same eight zones contained within the Sefton RSR which are based on postcode sectors grouped to reflect areas which are likely to exhibit similar patterns of shopping behaviour across the Borough and beyond. The Study draws upon the most recent Experian Micromarketer G3 population and expenditure data (published October 2014) in order to establish the up-to-date position with regard to both convenience and comparison goods capacity.

Structure of Report

- 1.04 Our Study is structured as follows:
- Section 2 provides a context for the Retail Study by providing an analysis of key retail trends;
 - Section 3 considers the up-to-date position in respect of relevant national retail and town centre planning policy;



- Section 4 sets out a review of the survey research and considers changes in shopping behaviour that have occurred since the undertaking of the previous Sefton RSR;
- Section 5 sets out an overview of the vitality and viability of Southport and Bootle town centres as well as a summary of the Borough's District centres and local centres and parades which cover the Borough;
- Section 6 identifies current and future population and expenditure levels within the Study Area;
- Section 7 provides our assessment of the quantitative and qualitative need for further convenience and comparison goods retail floorspace over the assessment period;
- Section 8 sets out our recommendations in respect of the future retail strategy for Sefton Borough.



2.0 Current and Emerging Retail Trends

Introduction

- 2.01 The retail property landscape across the UK has evolved significantly over the past 50 years, from post-war redevelopment in town centres, through to the emergence of retail warehouse parks and out-of-town regional shopping malls. For most of this period, the retail and leisure sectors have experienced considerable expenditure growth, which has been attributed to a number of factors, including greater disposable income, availability of credit, new technology and a general overall increase in our standard of living. However, recent economic conditions have had a clear impact on expenditure and convenience goods spending per capita has actually reduced in recent years. The way in which goods are purchased has also altered due to the increased popularity of 'e-tailing', which now claims more than one in every ten pounds spent in the UK.
- 2.02 The retail and leisure market and the need for new development continually evolves as a result of numerous factors including demographics, consumer demands, car ownership, planning policy and technological advancements. The share of retail spending has undergone a significant shift in the decade since 2002, with Verdict identifying that town centre spending as a proportion of overall spending declined from 47.7% to 39.9% at 2012. In contrast, spending in out of centre locations has increased over the same period by 2.1% and non-store locations (principally internet retailers) by 6.6%¹. These changes have had a major impact on the format and location of retail and leisure floorspace, which has led to recent Governments reaffirming their commitment to the 'town centre first' policy approach that is now outlined in the National Planning Policy Framework (NPPF) (March 2012).

Current Retail Picture

- 2.03 A recent report by Colliers² provides information regarding recent trends, together with forecasts for the future of retailing in the UK. The findings confirm that the retail sector has been significantly affected by the wider economic climate and that there is considerable uncertainty about the strength and durability of future growth. However, Colliers reports that the recent improved economic outlook is beginning to result in increased consumer

¹ 'UK Out of Town Retailing', Verdict Datamonitor, April 2012

² 'National Retail Barometer: Summer 2014', Colliers, September 2014



confidence and pockets of retailer expansion which are resulting in a reduction in vacant retail space. Furthermore, it is evident that the UK unemployment rate is currently falling (recorded as being 5.7% between October and December 2014, compared to 6.0% between July and September 2014)³ and that average pay for employees in Great Britain increased 2.1% between October and December 2014 compared to the same period 12 months earlier⁴.

- 2.04 Notwithstanding these very recent encouraging signs, the economic conditions of the past few years have had a significant impact on the public's ability and willingness to spend their earnings on retail goods. Since 2010 there have also been increases in taxation (for example in VAT, national insurance contributions and capital gains tax) which also impact upon households' spending. Furthermore, in recent years inflation has consistently been at a level beyond average earnings growth and a delay in reviewing business rates has been identified by both the Portas⁵ and Grimsey⁶ Reviews as a key factor affecting the success of many operators.
- 2.05 Recent economic conditions have resulted in significant structural changes to the high street, whereby the pressure on retailers to remain solvent has meant that many are showing increased signs of caution in their investment decisions. In particular, retailers are rationalising their physical store portfolios by reducing their number of stores, abandoning their representation in weaker centres and concentrating on acquiring sites in city centres and major regional shopping centres. The Grimsey Review identified that the national vacancy rate at 2013 equated to over 22,000 empty shops across the top 650 town centres. The Centre for Retail Research⁷ estimates that overall store numbers will fall by 61,930 between 2012 and 2018, with the main impact being upon non-food stores. The report also estimates that 316,000 people will become unemployed, permanently or temporarily, as a result of these store closures.
- 2.06 To address this, many retailers have sought to re-negotiate their lease terms with landlords in order to enable them to switch from quarterly rents to monthly agreements, with several high street firms (including Monsoon and New Look) trying to ease the cash flow burden of paying

³ 'Labour Market Statistics, February 2015 Release', ONS, February 2015

⁴ Ibid

⁵ 'The Portas Review', December 2011

⁶ 'The Grimsey Review – An Alternative Future for the High Street', September 2013

⁷ 'Retail Futures 2018', Centre for Retail Research, May 2013



rent three months in advance. Furthermore, some retailers are finding it increasingly difficult to justify being represented in every town in the UK and in less profitable markets. As a consequence, demand has reduced considerably for 'poorer quality premises' in secondary locations and in many smaller towns with a commensurate drop in value (and often rent). Large cities and towns are likely to suffer less compared to smaller centres, given that they provide an enhanced choice for customers and offer the greater retail and leisure 'experience' that consumers increasingly desire.

- 2.07 In summary, there has been a marked polarisation and divergence in retailer spending, characterised by diminishing demand for secondary premises in smaller peripheral centres and increasing interest for well located and appropriately configured floorspace in key centres. It is evident that whilst Central London, regional city centres and regional shopping malls are relatively stable, a significant number of small and medium sized towns which serve a localised catchment may need to implement innovative ideas in order to compete for expenditure and reduce trade leakage.
- 2.08 In terms of retail rental values, Colliers⁸ notes that national rates increased by 0.1% in Quarter 1 of 2014, to end 11 consecutive months of decline and to provide evidence that conditions in the retail mark are stabilising. However, Colliers also reports that this position is skewed by growth in London and a small number of other destinations, with towns that have benefitted from growth typically being able to offer: an under-supply of retail floorspace; a tight prime pitch; strong tenant demand; affordable rents; a wealthy demographic; and, limited out of town provision.
- 2.09 Given current spending patterns and the wider uncertain economic climate, it is unsurprising that Experian, which monitors and forecasts retail consumer expenditure in the UK, has in recent years identified significant changes when reviewing its forecast growth rates for both convenience and comparison goods expenditure over the short term. Experian's⁹ forecast annual per capita convenience goods growth rate is -0.5% at 2014, +0.5% at 2015 and +0.4% at 2016. By way of contrast, Experian¹⁰ forecast in 2009 that per capita convenience goods growth would equate to +1.1% per annum across these same three reporting years.

⁸ 'Midsummer Retail Report 2014: Coming Up for Air', Colliers, July 2014

⁹ Experian Retail Planner Briefing Note 12.1 (Figure 1a), October 2014

¹⁰ Experian Retail Planner Briefing Note 7.1 (Figure 1), August 2009



- 2.10 However, Experian's forecast annual per capita comparison goods growth rates are significantly more positive than in the recent years and are similar to those recorded prior to the recession. Experian identifies per capita growth of +5.6% at 2014, +4.4% at 2014 and +3.1% at 2015.
- 2.11 Despite difficulties in recent years across the comparison goods sector, certain types of retail have continued to perform well. The market for recreational goods has, on the whole, performed strongly in recent years, with healthy growth attributed to supermarket sales together with the growing popularity of online shopping, which continues to see an increase in sales year-on-year. However, the manner in which such purchases are made has changed considerably, with the increasing popularity of the internet to purchase books and music having a notable impact on the composition of town centres, with such stores all but disappearing from the high street. Other businesses have experienced growth in the last two years, with the Grimsey Review¹¹ reporting a 12% increase (equating to an additional 1,100 stores) in 'value-related retailing' outlets, including second-hand, discount and charity shops. The Grimsey Review also makes reference to the expansion of pawnbrokers, pay-day lenders and betting shops which have collectively experienced a 17% growth in the number of such outlets since 2011.

Trends in Comparison Goods Retailing

- 2.12 Whilst it is not anticipated that growth in retail spending over the next ten years will mirror that achieved after the turn of the millennium, there is expected to be some growth in comparison goods expenditure in coming years. Consequently, there is an increasing focus from retailers on achieving more efficient use of their floorspace, particularly given the recent poor performance of certain national multiples, many of which have been affected by the significant increase in e-tailing and increases in rental levels secured before 2008. As a result of the current economic climate, retailers are more reluctant to commit to new development than they have been in previous decades. Instead, they are more selective and are holding out for accommodation that is appropriate both in terms of location and the type of premises provided. Indeed, retailers are seeking to occupy larger units in order to achieve more efficient use of floorspace and attract shoppers from a wider area. These larger floor plates

¹¹ 'The Grimsey Review – An Alternative Future for the High Street', September 2013



enable operators to provide a greater range of goods; for example, in 2011, when the retail market was generally stagnant, Primark opened one million sq.ft of new retail space.

- 2.13 International market conditions and price deflation in some key sectors have also meant that many high street names are becoming increasingly vulnerable to takeover. This is being pursued through disposals, company voluntary administrations (CVAs), informal arrangements with landlords, lease expiries and break options. More generally, whilst there is likely to be continued demand for larger, modern retail units in the future, increased sensitivity over future viability will mean a cautious approach to new investment for many key national retailers. Marginal locations within centres will increasingly be rejected. Many national retailers, who would have previously considered smaller/lower order centres in order to increase their market share, are now assessing their future strategies given the ongoing downturn in the economy. Consequently, many investment decisions will be influenced by the scale of commitment from other retailers; developers will increasingly need to promote large town centre redevelopment schemes with anchor tenants if they are to attract other high quality retailers.

Trends in Food Retailing

- 2.14 In the aftermath of the growth in the number of edge and out of centre large format supermarkets during the 1990s, development of such facilities is now more limited due to stricter planning laws (following the publication of PPS4 and, subsequently, the NPPF) and a lack of suitable sites. As a result, the national multiples in the food retailing sector are finding a range of other measures to improve their market share. These include:
- Offering a wider product range, such as financial and insurance products, petrol and non-food goods;
 - Developing a wide range of retail models, for example small-format convenience stores in town centres (e.g. Sainsbury's Local, Tesco Express), smaller supermarkets mostly in town centres (e.g. Tesco Metro), superstores (e.g. Tesco) and hypermarkets (e.g. Tesco Extra, Asda Supercentres);
 - Extended opening hours;
 - Offering cheap products and no-frills service;
 - Providing an attractive and powerful brand image; and



- Offering a home delivery service.

2.15 Mintel¹² identifies that the recession – allied with a period of higher inflation – has had an impact on consumer behaviour and the wider dynamics of grocery retailing. Price, or specifically value, is now identified as the key issue for consumers, and more shoppers are assessing whether purchases represent value for money. Shoppers now realise that they are able to 'trade down' and switch to own-label ranges or to discount retailer to save money without sacrificing on quality. Indeed, customers are mixing value and premium in the same basket. It is noted that as weekly food budgets fall and consumers alter their shopping habits, growth will be limited and the battle for market share will intensify further. Winning a share of consumer spend will require more than low prices, with shoppers increasingly seeking to source high-quality, good value food.

2.16 The changing UK demographics are also having a major impact on the food and grocery sector. For example, there has been a rise in single occupancy young professional households who are 'time poor' and relatively 'cash rich'. Though their baskets might be small, they tend to buy higher value items, therefore providing an opportunity to boost volume and value growth. Elsewhere, an ageing population profile is leading to a rise in time rich consumers who are likely to make more frequent small trips rather than do large weekly shops. The contrasting requirements of these markets means that retailers are seeking to open a variety of stores with a particular current focus on discount and small convenience stores.

2.17 Verdict¹³ estimates that the food and grocery sector was worth an £139.5 billion in 2014, equating to an annual growth of 2.8%. The four key supermarket chains in the UK have respective market shares of 27.0% (Tesco), 16.3% (Asda), 15.6% (Sainsbury's) and 10.1% (Morrisons). National multiple retailers, which also include operators such as Co-operative Food (5.1%), Aldi (4.2%) and Waitrose (4.0%), represent a total grocery market share of 90.9%.

2.18 There has been a recent slowdown in the growth plans of the majority of the principal supermarket operators. Tesco, for example, indicated in April 2013 that it had scrapped

¹² 'Food & Drink Retailing', Mintel, March 2013

¹³ 'UK Food & Grocery – Verdict Sector Report', Verdict, October 2013



plans for major store developments on more than 100 sites and would instead focus on developing medium size units. It then subsequently announced in January 2015 its intention to pull out of a further 49 store development and to close 43 existing stores.

- 2.19 Asda is the second largest supermarket retailer in the UK, with more than 550 stores nationwide. In contrast to Tesco's plans, it announced in February 2015 its intention to invest £600m opening 17 new supermarkets and revamping 62 more. It also intends to open a further number of petrol filling stations and develop locations where shoppers can pick up groceries ordered online. Asda's focus for additional openings is believed to be London and the south of England.
- 2.20 Morrisons also intends fewer larger stores once its current pipeline of development is completed. Its recent focus has been on developing the small-scale M Local convenience format store, which has significantly fewer stores than either Tesco Express or Sainsbury's Local. However, the retailer posted disappointing results for the year to 1 February 2015 and announced the closure of 23 M Local store with the loss of 300 jobs. Its current priority is believed to be investment into its existing portfolio of stores.
- 2.21 Sainsbury's announced in October 2014 its intention to further develop the Sainsbury's Local format and to improve its online offering. However, its most significant move is to enter the discount market under the Netto fascia, with Sainsbury's owning a half share in Netto's UK operation. Netto announced the trialling of 15 stores in November 2014 clustered around the M62 corridor between Liverpool and Hull in order to 'test the water'. Two new build openings were announced in March 2015 in Lymm and Hull, which appears to suggest confidence in the venture.
- 2.22 Emboldened by changing convenience goods shopping patterns and significant increases in their market share, Aldi and Lidl have both announced ambitious store opening targets that, if met, will further increase pressure on the 'main four' operators (these being Asda, Morrisons, Sainsbury's and Tesco). Recent announcements suggest that Aldi is seeking to add more than 1 million sq.ft of additional floorspace in 2015 through the opening of around 60 stores and that Lidl will also add around 340,000 sq.ft this year.



2.23 More generally, the role of supermarkets has continued to develop in recent years, with the large operators now offering a greater diversity of goods and services, via a larger number of formats and locations. Food and non-food sales are also increasingly being driven by large supermarket growth, with half of town centres competing with five or more supermarkets within a two mile radius¹⁴. Whilst the exact impacts which will arise from the opening of a new supermarket are dependent on local circumstances, British Council Shopping Centres (BCSC) notes that there has been a significant decline in the number of independent food retailers in recent times, including a reduction of 45% between 1996 and 2007 in the number of greengrocers. Over the same time period the market share of total retail sales secured by supermarkets increased from 38% to 42%.

Leisure Sector

2.24 The daytime and evening leisure sector has undergone a major shift in the last five years, with the reduction in the income levels of consumers having an impact on their ability to spend on these types of discretionary activities and items. Mintel calculated that the total UK leisure market was worth almost £70 billion in 2012, only 0.2% higher than in 2007¹⁵. A review of the leisure activity participation and frequency levels indicates that eating and drinking out of the home still remain the most popular activities which people do on a monthly basis, with the cinema the next most popular of the non-food and drink-led activities. Other activities, including going to a theatre, tenpin bowling and visiting a zoo are, on average, undertaken less frequently and this is at least in part reflective of their greater average cost. It is expected that the difficult trading conditions for the leisure sector are set to continue in the immediate future as a result of the shortfall in the amount of money that consumers have available to spend.

2.25 The number of leisure centres and swimming pools has increased in the past few years, though many local authorities are currently under budget constraints and there is some evidence that the ongoing operation of such leisure facilities is, on occasion, being threatened. Mintel¹⁶ notes that 38% of adults use a health centre or swimming pool and research by the Leisure Database Company¹⁷ indicates that the health and fitness private sector had a market value of approximately £3.9 billion in March 2012, an increase of 1.5%

¹⁴ 'What Does the Future Hold for Town Centres?', BCSC, September 2011

¹⁵ 'Leisure Review', Mintel, December 2012

¹⁶ 'Leisure Centres and Swimming Pools', Mintel, January 2013

¹⁷ 'State of the UK Fitness Industry', The Leisure Database Company, June 2013



over the previous twelve month period. Mintel also notes that, whilst only 15% of adults currently use a private health and fitness club, the potential for a further expansion of the market remains strong.

2.26 The health and fitness sector is dominated by the David Lloyd Leisure and Virgin Active operators, with these two health clubs having approximately 455,000 and 435,000 members¹⁸. There has also been a rapid growth in the number of the no-contract budget club operators, with Pure Gym (260,000 members) and The Gym (255,000 members) ranked fourth and fifth in the list of leading chains behind DW Sports Fitness which has 275,000 members. Mintel identifies that there has been a growth in the popularity of innovative exercise classes and technological features to attract additional people to these clubs, with many of the higher end clubs also adding spa facilities to their offer.

2.27 In terms of other leisure activities, the cinema sector is performing steadily, with data indicating that there were 173 million UK cinema admissions in 2012, an increase of 0.5% since 2011. Mintel¹⁹ identifies that the eating out market has grown by around 8% between 2008 and 2013, and by an estimated 2.3% between 2012 and 2013, to an estimated £32.1 billion. It recognises however that this has largely been driven by inflation, with consumer demand muted by recent low consumer confidence levels.

Out of Centre Development

2.28 Despite the 'town centre first' planning policies which have been adopted by recent Governments, research undertaken by Verdict²⁰ indicates that between 2007 and 2012, the amount of out of centre floorspace increased by 23%. However, in very recent years, Colliers notes that the demand for out of centre representation has been limited, with those retailers seeking to acquire stores having a pick of vacant stock which has been made available through the administration of MFI (in November 2008), Land of Leather (in January 2009) and Focus DIY (in May 2011), amongst others. However, only five retailers with any significant out-of-town presence have failed since June 2011, these being Allied Carpets, Clintons, Comet, GAME and Peacocks.

¹⁸ 'Health and Fitness Clubs', Mintel, June 2013

¹⁹ 'Eating Out Review', Mintel, June 2013

²⁰ 'UK Out of Town Retailing', Verdict Datamonitor, April 2012



- 2.29 The national average vacancy rate²¹ in out of centre retail warehouses in 2014 was 8.0%, an increase of around 4.1% since 2012. Some of the voids created by administrations remain un-let and the flooding of the market with so much unwanted space has acted to reduce rents. Retailers who have had their pick of the best stores include Dunelm, Pets at Home, Dreams, Matalan, Dixons Group, Go Outdoors, B&M, Mothercare, Next Home and TK Maxx.
- 2.30 Looking forward, Colliers²² indicates that future out of centre development will fall into two main categories. The first relates to the adaptation and refurbishment of existing stock. Colliers states that between 80% and 90% of the retail warehousing stock that the UK requires to service demand has already been built. Accordingly, most development activity will see landlords seeking to improve the suitability of their property for the latest retailers and also make improvements to improve dwell time on retail parks (for example, by seeking to introduce coffee shops and restaurants). Older schemes may be remodelled or redeveloped to meet current needs. According to Colliers, the other main strand of out of centre retail development relates to opportunities in areas where there has not been a great deal of retail warehousing in the past.

Shopping Centre Development

- 2.31 Shopping centre retail development has been at a virtual standstill in recent years, but there are a few signs that a corner may about to be turned. Cushman & Wakefield²³ reports that development activity was restrained in 2014, with an estimated 124,300 sq.m of shopping centre space added over the course of the year, which is less than half the total added in 2013. Cushman & Wakefield indicates that the shopping centre development pipeline for 2015 totals 154,618 sq.m and includes the 51,100 sq.m Westfield Bradford and the 27,870 sq.m Friars Walk in Newport, both of which are scheduled to open in Autumn 2015. It is anticipated that next year will see the delivery of several shopping extensions, including Birmingham's Grand Central centre, which when complete, will nearly double its size to 53,000 sq.m. Cushman & Wakefield forecasts that the shopping centre pipeline will pick up significantly from 2017 as the economic recovery and the greater availability of finance help to bring forward new schemes and extensions that already have planning permission.

²¹ 'Vacancy Report Summary H2 2014', Local Data Company, February 2015

²² 'Midsummer Retail Report 2014: Coming Up for Air', Colliers, July 2014

²³ 'Marketbeat Shopping Centre Development Report', Cushman & Wakefield, September 2014



Research by Colliers²⁴ further reflects a shift towards increased activity, identifying that transactional investment grew by 43% to £6.09 billion in 2014 compared to 2013.

2.32 Notwithstanding this, the viability of shopping centre retail development remains, for the moment, challenging no matter how well designed or well located a scheme is. There are three types of scheme which have a better chance of success in the current economic climate. The first of these will be where a town has a large, affluent catchment and an acknowledged undersupply of retail floorspace in both town centre and out-of-town locations. The second scenario relates to schemes which were very close to happening before the recession took hold, which may be revised to better meet the current needs of the market. Barnsley, Macclesfield, Bradford and Lichfield are examples of such schemes. The third opportunity relates to development where the key anchor is a foodstore and, as a result, demand has remained strong. However, due to changes in the food retail sector and the trading model of the 'main four' operators, opportunities in this latter category are more difficult to come by.

2.33 In addition to retail, food and drink is becoming an integral part of many shopping centres, which is helping to bolster demand. In particular, consumers are increasingly travelling to larger centres to use the leisure facilities and experience more of a complete 'day out'. In the past, it was relatively typical for non-retail uses to occupy less than 10% of shopping centre floorspace, but this has increased in recent schemes, including Westfield in Stratford where catering and leisure units occupy over 20% of the space.

Growth in E-tailing ('E-commerce')

2.34 Many consumers who previously shopped in town centres and at retail parks are now increasingly using the internet to make purchases. Experian²⁵ identifies that internet sales' share of total retail sales stood at 10.6% in mid-2014 compared to just 4.7% at June 2008. The value of internet sales in 2014 is estimated at £37.2 billion.

2.35 The rise in recent years of e-commerce has had a major impact upon retailers, developers and investors alike, with the top 10 e-retailers in 2012 including Amazon UK (16%), Shop

²⁴ 'UK Shopping Centres Investment Report 2014', MSCI with Colliers, March 2015

²⁵ 'Experian Retail Planner Briefing Note 12.1', October 2014



Direct (5%) and Next (4%)²⁶. As access to the internet/online shopping continues to grow through digital televisions, tablets and mobile phones, proportionally less money is anticipated to be spent on the high street or at retail parks.

- 2.36 The growth in internet as a sales medium has been enabled by the increase in access to the internet by households, which the Office for National Statistics²⁷ reports increased from 57% at 2006 to 83% in 2013. A total of 22 million households in Great Britain now have internet access. The proportion of households with access to the internet is expected to increase further over the coming years, alongside the growth in mobile phone and tablets with access via the new 4G spectrum. The ONS states that access to the internet using a mobile phone more than doubled between 2010 and 2014, from 24% to 58%. This has supported the strong growth recorded, together with improved consumer confidence in the security of online payment, deliveries and heavy demand for expensive electrical products available online. The option of using the internet to 'click and collect' in-store at a dedicated counter is also increasing in popularity (particularly within stores with large sales areas), with the service now accounting for around a fifth of John Lewis internet orders.
- 2.37 As a consequence of such changes, the Office for National Statistics²⁸ indicates that the number of people using the internet to purchase goods continues to rise, with 74% of the UK population purchasing products over the internet in 2013, compared to 53% in 2008. The most popular online purchases were clothes/sports goods, with 49% of all adults in the UK purchasing some items via the internet. In addition, 42% of the population bought household goods online and 23% bought food or groceries.
- 2.38 Online spending continues to be the key growth opportunity for national and independent retailers, accounting for increasing proportions of total sales. For example, online sales at Next in 2011 accounted for 44% of operating profit and 32% of group sales. With regard to foodstore operators, food accounts for 20.5% of all internet sales, which equates to 3.1% of all food retailing²⁹. Verdict's research identifies that, with the exception of Morrisons (though it is currently in the process of establishing an online presence via Ocado), major retailers have seen their business grow as online shopping has increased and, as a result, the likes of

²⁶ Ibid

²⁷ 'Statistical Bulletin: Internet Access Households and Individuals', Office for National Statistics, August 2013

²⁸ Ibid

²⁹ 'Shop Expansion and the Internet', CBRE, May 2012



Asda and Sainsbury's have improved their geographical coverage and capacity. In particular, online sales at Tesco currently exceed £2 billion, with Colliers noting that the operator has a reported 48% online grocery market share.

2.39 It is evident that internet shopping as a whole is having an impact upon traditional high streets, in light of increased competition and lower prices. Consequently, there is a possibility that online retailing will continue to put some pressure on retail rental growth over the next five to ten years. In particular, it appears likely that smaller town centres (which may be less able to offer a complete 'shopping experience') are likely to be the subject of greater ongoing impacts from online retailing.

2.40 Despite some variance in the estimated future growth of online shopping, it is clear that e-tailing cannot entirely replace the 'shopping experience' as shopping is a social activity. In this regard, retailers are already adopting innovative approaches to encourage people to visit their store through 'try before you buy' concepts. For example, Ellis Brigham has installed Vertical Chill indoor ice climbing walls at five stores for customers to try equipment and to interact with products. For successful retailers, online selling provides an additional route to the market. Online retailers benefit from demand generated through physical channels whilst high street outlets can benefit from reaching a wider customer base through the internet. Those retailers who are likely to have a healthy future are those who are able to combine a strong high street presence with an interesting and closely related e-tail offer.

Summary

2.41 In summary, it is evident that the retail market has undergone significant changes in recent years. Wider economic conditions facing the UK have led to a marked decline in some previously healthy town centres, as well as other traditional retail formats. This has principally been caused by a decline in available expenditure, due to suppressed disposable incomes and an increase in the proportion of expenditure committed online.

2.42 However, 2014 has seen an increase in consumer confidence, mainly driven by an improved economic outlook as a result of falling unemployment and the availability of credit. As a consequence, it is anticipated that expenditure growth rates will increase moving forward. Whilst such forecasts remain below those achieved before the recession, they are significantly



higher than those recorded over the last three or four years. The growth in online sales has also impinged on the need for new tangible floorspace. However, increased expenditure growth allied with the retail industry embracement of innovative multi-channelling retail strategies, provides an opportunity for town centres to widen their audience in the future and retain ground. To deliver on this, it will be critical that town centres are flexible enough to both embrace and complement digital solutions, whilst also providing appropriate and well managed retail floorspace that can showcase products and services. The ability for centres to 'move with times' and utilise modern technology, whilst providing a materially different experience to online shopping (partly through the inclusion of leisure and food and drink offers), will help ensure their ongoing vitality and viability.



3.0 Planning Policy Context

Introduction

- 3.01 Given that this Study seeks to provide important evidence to assist in the production of future retail planning policy, it is important to review existing national planning policy of pertinence to retail and town centre matters to explore the context for the Study and how it may impact upon the production of the Local Plan. We also summarise Sefton Borough Council's planning policy, insofar as it is relevant to retail and leisure matters, in order to consider the Council's strategy in respect of its centres.

National Planning Policy Framework

- 3.02 The National Planning Policy Framework was published in March 2012. The NPPF replaces all former Planning Policy Statements, Planning Policy Guidance Notes and some Circulars in a single consolidated document.
- 3.03 The main theme of the NPPF is that there should be 'a presumption in favour of sustainable development'. In terms of plan-making, it is stated that local planning authorities should positively seek opportunities to meet the development needs of their area, with an emphasis on Local Plans having sufficient flexibility to adapt to rapid change.
- 3.04 In terms of economic development, it is set out within the NPPF's core principles that planning should proactively drive and support economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs. Every effort should be made to objectively identify and then meet the business and other development needs of an area, with positive responses made to wider opportunities for growth.
- 3.05 The NPPF stresses the Government's commitment to securing economic growth in order to create jobs and prosperity, with paragraph 17 stating that the planning system should do everything it can to support sustainable economic growth.
- 3.06 Paragraph 19 indicates that planning should operate to encourage and not to act as an impediment to sustainable growth, and that significant weight should be placed on the need



to support economic growth through the planning system. The NPPF seeks to ensure that local planning authorities plan proactively to meet the development needs of business and support an economy fit for the 21st century.

3.07 The NPPF still recognises the need to promote the vitality and viability of towns and cities through the promotion of competition and growth management during the plan period. Paragraph 23 of the NPPF provides guidance for local planning authorities in drawing up Local Plans, it indicates that they should:

- recognise town centres as the heart of their communities and pursue policies to support their vitality and viability;
- define a network and hierarchy of centres that is resilient to anticipated future economic changes;
- define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;
- promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
- retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
- allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centre. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Local planning authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites;
- allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;
- set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;



- recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites; and
 - where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.
- 3.08 Paragraph 23 also indicates that needs for retail, leisure, office and other main town centre uses should be met in full and should not be compromised by limited site availability.
- 3.09 Paragraph 24 requires local planning authorities to adopt a sequential approach to the consideration of planning applications for main town centre uses that are not in an existing centre or in accordance with an up-to-date Local Plan. The following paragraph 25 indicates that that the sequential approach should not apply to applications for small scale rural offices or other small scale development.
- 3.10 Paragraph 26 indicates that local planning authorities should require an impact assessment for retail, leisure and office development outside of town centres which are not in accordance with an up-to-date Local Plan and if the development is over a proportionate, locally set threshold. Where there is no locally defined threshold, the default threshold will be 2,500 sq.m.
- 3.11 Paragraph 27 indicates that where an application fails to satisfy the sequential test or is likely to have a significant adverse impact on the vitality and viability of a town centre or on existing, planned, committed investment in a centre it should be refused.
- 3.12 The NPPF also recognises that retail activity should still, where possible, be focused in existing town centres. Retail and leisure proposals which cannot be accommodated in or adjacent to the town centre will have to satisfy a dual impact test and the sequential test.

Ensuring the Vitality of Town Centres Planning Practice Guidance

- 3.13 Ensuring the Vitality of Town Centres National Planning Practice Guidance was published in March 2014 and replaces the previous Planning for Town Centres Practice Guidance. It



provides a more concise summation of how retail and main town centre planning policy is to be applied in practice. However, the objectives of the Practice Guidance remain comparable with those of its predecessor, with there being a stated requirement for local planning authorities to plan positively and support town centres to generate local employment, promote competition within and between town centres, and create attractive and diverse places for users.

- 3.14 The Practice Guidance requires local planning authorities to fully assess and plan to meet needs for main town centre uses through the adoption of a 'town centre first' approach. Paragraphs 002 and 003 confirm that this should be delivered through a positive vision or strategy which is communicated through the development plan. The strategy should be facilitated through active engagement with the private sector and other interested organisations (including Portas Pilot organisations, Town Teams and so on). Any strategy should be based on evidence which clarifies the current state of town centres and opportunities to meet development needs and support centres' vitality and viability.
- 3.15 Such strategies should seek to address the following matters:
- the appropriate and realistic role, function and hierarchy of town centres in the area of over the plan period, including an audit of the vitality and viability of existing town centres and their ability to accommodate new development;
 - consideration of the vision for the future of each town centre and the most appropriate mix of uses;
 - the assessment of the scale of development that a town centre can accommodate;
 - the timeframe for new that new retail floorspace can be delivered;
 - what other complementary strategies are necessary or appropriate to enhance the town centre to deliver the vision in the future; and
 - the consideration of the enhancement of car parking provision including charging and enforcement mechanisms.
- 3.16 Paragraph 005 of the Practice Guidance identifies a series of key indicators which are of relevance in assessing the health of a centre over time. Paragraph 005 goes on to state that not all successful town centre regeneration initiatives have been retail led or focused on



substantial new development, but have instead involved improvements such as renewed public realm, parking, and accessibility and other partnership mechanisms. Paragraph 007 identifies the importance of planning for tourism as an important component of any overall vision and indicates that local planning authorities should consider specific tourism needs (including locational or operational requirements) and opportunities for tourism to support local services, vibrancy and the built environment.

- 3.17 Paragraph 009 reaffirms the town centre first policy in the form of the sequential test, which requires local planning authorities to undertake an assessment of candidate sites' availability, suitability and viability when preparing their local plan. Such an assessment should also consider the scale of future needs and the type of land needed to accommodate main town centre uses.

Housing and Economic Development Needs Assessment Planning Practice Guidance

- 3.18 The Government has issued further Practice Guidance to provide specific instruction in respect of the undertaking of needs assessments (including those for main town centre uses). Paragraph 032 of the Practice Guidance states that plan makers should consider forecasts of quantitative and qualitative need based on a range of data which is current and robust. Local planning authorities will need to take account of business cycles and make use of forecasts and surveys to assess employment land requirements.

Relaxation of Permitted Development Rights

- 3.19 At a national level, recent changes to the Town and Country Planning (General Permitted Development) Order 1995 have sought to support the diversification and vitality of town centres. The changes follow the Portas Report recommendation to make it easier to change surplus space in order to provide for the effective re-use of buildings.
- 3.20 The Town and Country Planning (General Permitted Development) (Amendment) (England) Order 2013 came into force on 30 May 2013. It provides, for a period of three years, for the change of use of Use Class B1 offices to residential without the need for planning permission. The Order also provided for the temporary change of use (for up to two years) of uses falling within Use Classes A1, A2, A3, A4, A5, B1, D1 and D2 to uses falling within Classes A1, A2,



A3 and B1, subject to the use relating to no more than 150 sq.m of floorspace and subject to the temporary provision not previously being relied upon.

- 3.21 From 6 April 2014, permitted development rights were further extended with relevance to town centre uses. The changes came into force under the Town and Country Planning (General Permitted Development) (Amendment and Consequential Provisions) (England) Order 2014. Extended permitted development rights included the change of use from Use Classes A1 and A2 to residential use, subject to certain restrictions.
- 3.22 The Town and Country Planning (General Permitted Development) (England) Order 2015, which came into force on 15 April 2015 consolidated regulations concerning General Permitted Development in England and provides extended permitted development rights relating to changes of use. Further permitted development rights provided by the Order include the conversion of premises within Classes A1 or A2, as well as betting offices, pay day loan shops and casinos to restaurants/cafes (A3), on a permanent basis. These rights are subject to the use relating to no more than 150 sq.m of floorspace, and are subject to prior approval. A new permitted development right was introduced to allow a permanent change of use of premises within Use Class A1 to Use Class A2. The order also established permitted development rights for the conversion of premises within Use Classes A1 or A2 to assembly and leisure uses (D2), subject to certain restrictions. A permitted development right was also introduced to allow the conversion of casinos and amusement arcades to residential use up to a threshold of 150 sq.m.
- 3.23 The intended consequence of such measures is to secure the redevelopment and reuse of premises. However, it is considered that the relaxation in respect of changes of use to residential are more likely to encourage re-use of offices in larger metropolitan areas which may benefit from a greater supply of office buildings and where previously there may have been some reluctance to grant planning permission for residential uses. Notwithstanding this, the changes set out above are of relevance to the Sefton Borough and we return to them in the concluding section of this Study.



Development Plan

Sefton Unitary Development Plan (June 2006)

- 3.24 The Sefton Unitary Development Plan (UDP) covers the period from 2001 to 2016. Under the Planning and Compulsory Purchase Act 2004, the policies in the UDP were automatically saved for three years until 29 June 2009. The Secretary of State subsequently made a Direction to save specific policies beyond this 3 year period until they are replaced by Local Plan policies.
- 3.25 The UDP's key objective is to 'make a positive contribution to the prosperity and quality of life of all Sefton's communities by promoting sustainable development'. The principles to deliver this include the promotion of urban regeneration, caring for the environment and reducing disadvantage. The central strategy seeks to deliver urban regeneration through a policy objective of regeneration and development, which sees retail development as a key theme to help deliver this objective. The UDP seeks to ensure that where there is a need for major retail development it should be located where it will contribute to the vitality and viability of existing town, district and local shopping centres.
- 3.26 Chapter 7 of the UDP deals with retail planning matters and sets out the retail hierarchy for Sefton, which classifies Southport and Bootle as the main two town centre for the Borough. These are supported by a four district centres which comprise Waterloo, Crosby, Maghull and Formby and then by seven local centres. New retail development is focused on defined town, district and local centres through Policy R1 where there is a requirement for the sequential approach to be applied for new retail development. Policy R2 deals with Southport town centre, and policy R3 promotes the Southport station complex redevelopment for a mixture of retail, food and drink, leisure, hotel and residential uses.
- 3.27 In terms of Bootle town centre, Policy R4 seeks to focus new retail development within the town centre or to identified sites on the edge of the centre. Policy R6 and R7 deal with development and potential impacts on district and local planning centres and local shopping parades.



- 3.28 Policy R9 sets out a number of criteria for proposals for retail development and other key town centre uses on edge-of-centre or out-of-centre sites. It notes that these schemes will only be permitted if there is a demonstrable need for the proposal³⁰, that the proposal satisfies the sequential approach to site selection and that there will be no adverse harm to the vitality and viability of any Town, District and Local Centres either individually or cumulatively. In addition, proposals for out-of-centre locations will also need to demonstrate that they are accessible, or will be made accessible, by sustainable modes of transport, will reduce car use and overall travel patterns and make a positive contribution to regeneration in the Urban Priority Areas.
- 3.29 Policy R10 allocates the Lanstar site at Litherland for the erection of retail foodstore (which has since been developed by Tesco).

Draft Sefton Local Plan 2015

- 3.30 The council is at an advanced stage in the preparation of a Local Plan that will replace current saved UDP policies. The draft Local Plan for Sefton (July 2015) (the draft Local Plan) (was submitted to the Secretary of State for independent examination in August 2015).
- 3.31 The Local Plan will set out how new development will be managed in the period from 2015 to 2030. It will guide new development to appropriate locations, while protecting our natural environment and built heritage and provides guidance to developers on submitting planning applications. It encourages sustainable development and economic growth and it gives current and future generations more opportunities to live and work in Sefton's outstanding environment.
- 3.32 The draft Local Plan sets out policies to specifically guide and inform planning decisions in relation to economic development and regeneration during the plan period, including with respect to retail development and the management of defined centres.
- 3.33 Sefton's town, district and local centres are identified as performing an important role within the Borough both in providing shops and services to meet the needs of the Borough's resident population but also in providing a location for jobs. The draft Local Plan identifies

³⁰ Although need is not now a test set out in the NPPF that has to be demonstrated by an applicant, it still forms part of the application of the sequential approach and the overall assessment of impact.



that Sefton's centres face continued and potentially increased competition from both new and existing developments outside of the Borough and from out of centre shopping destinations within the Borough. The resultant impacts of market pressures on the Borough's centres and the ability to attract new investment opportunities present challenges to regenerate the hardest hit centres. The centres of Bootle, Southport, Crosby, Maghull and Seaforth are specifically identified as experiencing difficulties in recent years and are identified as Regeneration Areas under Policy ED6 within the plan.

3.34 In response to the continuing major challenges facing Sefton's centres the draft Local Plan establishes that a key objective will be to 'define a new role' for the Borough's existing town and local centres in order to help stimulate regeneration and allow the centres to continue to serve the local community. Chapter 7 identifies an approach to provide support for a wider variety of uses within town centres. The overriding strategy outlined in the draft Local Plan is for new retail development to be focused towards the existing town, district and local centres; the strategy does not seek to propose new sites to meet the identified for retail or other development outside of the urban area.

3.35 Policy ED2 is the key policy in regard to development proposals for main town centre use, relevant to development proposals within defined centres and at shopping parades as well as for proposals located outside of the defined centres. The policy prescribes that retail, leisure and other main town centre uses will be directed to the existing centres in accordance with the retail hierarchy within the Borough. Part 1 of the policy sets out this hierarchy, which is as follows:

- Town Centres: Bootle and Southport
- District Centres: Crosby, Formby, Maghull and Waterloo
- Local Centres: Ainsdale, Birkdale, Churchtown, Netherton and Old Road

3.36 Part 2 of the policy establishes that all proposals for retail, leisure and other main town centre uses to be located outside of defined centres will be required to satisfy a sequential approach to development. This will require applications for such uses to be located firstly in town centres, then edge of centre locations, and only if suitable sites in these locations are not available should out of centre sites be considered. In addition, all retail, leisure and other main town centre uses are required to demonstrate that they would no prejudice the delivery



of planned investment within centres and would not result in a significantly adverse impact to the vitality and viability of existing centres.

3.37 Part 3 of the policy builds on the requirements of part 2 and requires all proposals for retail, leisure and other main town centre uses proposed to be located outside of existing defined centres to be accompanied by an impact assessment based on defined floorspace thresholds. The thresholds set out for the requirement of an impact assessment are as follows:

- Outside of the Primary Shopping Areas of Bootle and Southport, developments proposing more than 500 sq.m gross floorspace,
- Within 800 metres of the boundary of a district centre, developments proposing more than 300 sq.m gross floorspace, and
- Within 800 metres of the boundaries of a local centre, developments proposing more than 200 sq.m gross floorspace.

3.38 Part 4 of the policy seeks to define the Primary Shopping Areas (through the use of figure 7.2) for the two town centres and the four district centres by specifically identifying frontages. The policy prescribes that within the defined Primary Shopping Areas non-retail uses which are compatible with a town centre location will be permitted providing that the proposal would satisfy certain criteria based around ensuring the continued success and retail function of the centres. Outside of Primary Shopping Areas, but within defined centre, all main town centre uses are considered acceptable in principle.

3.39 Part 5 deals with residential development and specifies when such development will be considered appropriate within defined centres.

3.40 Part 6 identifies the town centres of Bootle and Southport as the main focus for convenience and comparison retail development within the south and north of the Borough respectively. Bootle is additionally identified as a focus for other town centre uses within the south of Sefton and Southport is identified to be a focus for cultural, education, office and leisure development in the north of Sefton. Part 7 also defines the district and local centres to be the main focus to serve local convenience shopping needs. The policy explanation provided for Policy ED2 in relation to district and local centres additionally identifies that a flexible approach is necessary for such centres to maintain their vitality and viability. Crosby and Maghull District Centres within Part 7 of the policy are identified as capable of accommodating a more significant scale of retail development.



- 3.41 Part 8 deals with local shopping parades and defines a shopping parade as four or more consecutive retail units or four retail units in any six units. Individual shopping parades within the Borough are not specifically identified within the draft Local Plan. WYG consider this to be an appropriate policy approach with shopping parades not constituting a retail centre in their own right. Part 8 establishes criteria which if satisfied would allow for non-retail development to be permitted within shopping parades in recognition of the need to support those shopping parades which may be performing poorly.
- 3.42 Policy E4 relates to defined Mixed Use Areas. Six of these areas are defined on the draft Proposals Maps which are;
- 1. Bootle Central Area
 - 2. Land at Crosby Road North, Waterloo
 - 3. Land at Copy Lane, Netherton
 - 4. Land to the West of Ormskirk Road, Aintree
 - 5. Switch Island, Aintree
 - 6. Land at Hawthorne Road / Church Road, Bootle
- 3.43 These areas are not considered to be characterised by a single type of use and are identified under Policy E4 to be suitable for office, light industry, health, education, civic and community uses and other uses complementary to the areas. The Bootle Central Area and Land at Crosby Road North, Waterloo both have specific implications for the development of Bootle Town Centre and Waterloo District Centre respectively in being located adjacent to the respective defined centres.
- 3.44 Policy ED5 seeks to support tourism in Sefton, which is recognised as making an important contribution to the Borough's economy. Southport Seafront and the Southport Central Area are identified as one of four locations in which tourism development will be supported in principle.
- 3.45 Policy ED6 identifies the priority regeneration areas and sites in Sefton. The policy is in three parts. Part 1 relates to regeneration in Bootle, Part 2 relates to the regeneration of specific town and retail centres and part 3 relates to the Dunnings Bridge Road Corridor.
- 3.46 Part 1 (a) of the policy refers to the Bootle Central Area (incorporating the Strand Shopping Centre and the Office Quarter). The supporting text identifies that the area is in need of fresh

investment to respond to new requirements and the changing demand for business space.

Regeneration objectives are outlined for the Bootle Central Area which are as follows:

- (i). The refurbishment, re-use or redevelopment of vacant office blocks and other vacant /under-used land for appropriate new uses, consistent with Policy ED4 'Mixed Use Areas'
- (ii). The refurbishment and re-use of Listed and historic buildings in and around Bootle Town Hall
- (iii). The focusing of new retail development within Bootle Town Centre (as defined on the Policy Map)
- (iv). The development of new restaurants, leisure facilities, hotels, and other appropriate uses within the Central Area, subject to policy ED2 'Development in Town Centres, District Centres , Local Centres and Local Shopping Parades and outside Defined Centres'
- (v). The expansion of Hugh Baird College and its campus
- (vi). The development of new buildings of an appropriate scale and mass on the Stanley Road frontage.

3.47 Part 2 of the policy identifies four specific regeneration areas which are shown on the draft Proposals Maps; these being 'Central Southport', 'Crosby Centre', 'Maghull Centre' and 'Seaforth Centre'. It is identified that development within each of these areas should contribute to regeneration in-line with specific policies elsewhere in the draft Local Plan.

3.48 The 'Central Southport' regeneration area includes the town centre, the Southport Central Area and the Seaforth. The regeneration of this area is considered an important priority in order to promote both retail and tourism in Southport.

3.49 For Maghull it is identified that the regeneration of the centre will provide modern, high quality, town centre floorspace. For the Seaforth Regeneration Area, proposals are required to support the specific regeneration objectives for the area which are listed as:

- (i). the consolidation of the existing shopping area,
- (ii). the introduction of complementary uses supporting the retail function,
- (iii). the redevelopment and positive re-use of vacant and / or derelict land and buildings.



- 3.50 Policy ED7 has links to ED6 and specifically relates to development within the Southport Central Area. This allocation encompasses the town centre, adjacent land between Lord Street and Promenade and land around Southport College.
- 3.51 The Southport Central Area extends beyond the main shopping area within the town and seeks to promote complimentary uses beyond retail including the development of new attractions, hotels, cultural uses, other tourist facilities as well as new educational development. The policy includes requirements for new development along Lord Street to promote active frontages and details that amusement arcades will not be permitted along the majority of the north west Lord Street frontage. This is in order to protect the character of the Conservation Area setting and support vitality and viability.
- 3.52 Policy ED8 relates to the Southport Seafront. The policy identifies that subject to compliance with other policies within the plan, the following uses will be acceptable in principle:
- (i). Leisure facilities
 - (ii). Hotels
 - (iii). Facilities for conferences, event and exhibitions, and
 - (iv). New or improved visitor attractions
- 3.53 The Marine Park site within the Southport Seafront is allocated for a major visitor-based development to support Southport's visitor economy. It is specified that any proposal to partially develop the site must not prejudice the ability to provide a comprehensive redevelopment of the area.
- 3.54 Policy ED9 relates to development within, and the regeneration of, the Crosby centre. The policy broadly seeks to support new in-centre high quality retail and other town centre developments, with consideration made to the importance of key sites. The policy seeks to ensure that development proposals will improve the town centre environment and pedestrian connections within the centre, as well as provide for active ground floor uses. It is intended that a Supplementary Planning Document will be prepared to support the regeneration of Crosby.
- 3.55 Policy EQ10 relates to proposals for food and drink uses (classes A3-A5 of the Use Classes Order). The draft policy dictates that proposals for such uses will only be considered acceptable if they would not cause significant harm to local amenity and that 'unacceptable



groupings' of similar uses which would harm the character of the area or public health would not result.



4.0 Original Market Research

Introduction

- 4.01 The undertaking of original market research enables in-depth analysis at a local level and allows the evaluation of the trade draw of particular town centres and other key destinations in the Borough. The use of specifically commissioned and tailored survey research is fundamental to identifying the likely capacity for future retail floorspace across the Study Area. Notwithstanding this, WYG acknowledges that there can be limitations to survey research, particularly with regard to the sample size which can be achieved, and the results should therefore be taken to be a broad indication of consumer preferences. As with previous objectives of the RSR it is also useful to compare the latest shopping patterns with the findings of 2001, 2005 and 2012 studies to assess whether there have been any structural changes to local shopping patterns that may reflect new developments that have occurred during the intervening period. This long term analysis will also allow a more in depth analysis to be explored that identifies any significant changes over a 14 year period, and if so, to explore potential reasons why such changes may have occurred.
- 4.02 A key requirement of this Study is the detailed understanding of shopping patterns in terms of the use of retail centres and the identification of the centres' catchment areas. WYG commissioned specialist market researchers NEMS to undertake a comprehensive household telephone survey to identify consumers' habits and preferences in the Study Area. We set out the general methodological approach to the surveys and the key results below.

Household Survey

- 4.03 In September 2015, a survey of 1,000 households was undertaken across the defined Study Area which comprises eight separate zones and stretches beyond the Sefton administrative boundaries to incorporate outlying areas, including in Liverpool City, West Lancashire and Knowsley authority areas. The Study Area is the same that has been adopted since 2001 and this approach makes it possible to compare and contrast the shopping patterns from 2001 to 2015. A map of the catchment is provided overleaf at Figure 4.1 and at greater scale at Appendix 1.



- 4.04 The defined catchment has been broken down into eight survey zones on a geographic basis in order to allow trends to be assessed at the local level. The zones are named S to O and Table 4.1 sets out the postcode sectors which define each of the zones used for the study. The authority area of Sefton broadly corresponds to Zones S, C, F, B and M; Zone NL broadly covers western parts of Liverpool; and Zone O broadly covers the western area of West Lancashire, and Zone K covers the western area of Knowsley district, mainly Kirkby.
- 4.05 Table 4.1 below sets out the postcode sectors which comprise each zone and a map of the catchment is provided below and at Appendix 1. The questions and full tabulation of results from the household survey are provided at Appendix 2.

Figure 4.1 – Study Area and Zones



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Table 4.1: Postcodes by Survey Zone

Survey Zone	Postcode Sectors
Zone S	PR8 1, PR8 2, PR8 3, PR8 4, PR8 5, PR8 6, PR9 0, PR9 7, PR9 9
Zone F	L37 0, L37 1, L37 2, L37 3, L37 4, L37 6, L37 8, L37 8, L38 8
Zone C	L22 0, L22 1, L22 2, L22 3, L22 4, L22 5, L22 6, L22 7, L22 8, L22 9, L23 0, L23 1, L23 2, L23 3, L23 4, L23 5, L23 6, L23 7, L23 8, L23 9, L23 9, L38 0, L38 3
Zone B	L20 0, L20 1, L20 3, L20 4, L20 5, L20 6, L20 7, L20 9, L21 0, L21 1, L21 2, L21 3, L21 4, L21 5, L21 6, L21 7, L21 8, L21 9, L30 1, L30 2, L30 3, L30 4, L30 5, L30 6, L30 7, L30 8, L30 9
Zone M	L10 0, L10 2, L10 3, L10 6, L10 8, L29 1, L29 3, L29 5, L29 6, L29 7, L29 8, L29 9, L31 1, L31 2, L31 3, L31 4, L31 5, L31 6, L31 7, L31 8, L31 9, L38 2, L38 4, L38 5, L38 6, L38 7, L9 5
Zone NL	L10 1, L10 5, L10 7, L10 9, L11 0, L11 1, L11 2, L11 3, L11 4, L11 5, L11 6, L11 7, L11 8, L11 9, L20 2, L20 8, L4 0, L4 1, L4 2, L4 3, L4 4, L4 5, L4 6, L4 7, L4 8, L4 9, L5 0, L5 1, L5 2, L5 3, L5 4, L5 5, L5 6, L5 7, L5 8, L5 9, L9 0, L9 1, L9 2, L9 3, L9 4, L9 5, L9 6, L9 7, L9 8, L9 9
Zone K	L10 4, L3 2, L32 1, L32 2, L32 3, L32 4, L32 5, L32 6, L32 7, L32 8, L32 9, L33 0, L33 1, L33 2, L33 5, L33 6, L33 7, L33 8, L33 9
Zone O	L33 3, L33 4, L37 5, L37 9, L38 1, L39 0, L39 1, L39 2, L39 3, L39 4, L39 5, L39 6, L39 7, L39 8, L39 9, L40 8, L40 9, PR9 8

- 4.06 The results of the household survey are utilised to calculate the expenditure claimed by each existing retail facility within the Study Area, a process which is considered in Section 5 of this Study. The household survey is also of assistance in identifying the market share claimed by specific retail destinations, the frequency of visit to purchase various types of goods, the incidence of linked trips, and the most popular means of accessing town centre facilities, the use of other town centre facilities, and so on.
- 4.07 It should be noted that the commentary which follows in this section is based on the analysis of shopping trips undertaken, without any specific regard to the level of expenditure which may have occurred during a trip. The consideration of market share of trips (rather than market share of expenditure) is of particular interest as it accurately allows changes in customers’ shopping habits to be monitored over time.
- 4.08 Accordingly, we consider the market share of trips to particular retail venues to purchase both convenience goods and comparison goods below. For convenience goods, respondents have been questioned in respect of where they last visited to undertake ‘main’ food shopping (which may take the form of a large ‘trolley’ shop and be undertaken on a weekly basis) and ‘top up’ food shopping (which will generally be undertaken on a more frequent basis and will involve the purchase of grocery staples, such as milk and bread, and



occasional items). For comparison goods, respondents have been questioned in respect of where they last visited to purchase eight separate types of comparison good, which can be categorised as either bulky or non-bulky goods.

- 4.09 Our market share analysis utilises the same NEMS dataset that is relied on in assessing quantitative need and therefore our commentary relates to tangible retail destinations only (in other words, expenditure which is committed through the internet and other special forms of trading does not form part of the market share element of the commentary that follows). We also provide commentary in terms of the changes which have occurred since the previous Household Survey was undertaken in 2012.

Changes to the Convenience Shopping Offer in Sefton Borough

- 4.10 Since 2011, there have been improvements to the provision of convenience shopping facilities in the Study Area, notably in respect of:

- Zone S – Extension of Aldi store at Meols Cop Centre in Southport by 466 sq.m;
- Zone F – introduction of Morrisons Local at Chapel Lane, Formby;
- Zone O – Netto at Hattlesley Way in Ormskirk (West Lancashire); and
- Zone B – new 1,575 sq.m (gross) Asda store at Orrell Lane in Bootle.

- 4.11 In addition and outside the Study Area, we can also confirm that a new Booths store has been completed at Ringtail Retail Park in neighbouring West Lancashire, which opened in 2015.

- 4.12 In addition there have been a number of closures in Sefton including:

- Zone B – closure of the Co-Operative Food at Linacre Road in Litherland; and
- Zone B – closure of the Tesco Metro in the Strand Shopping Centre (747 sq.m net).

Main Food Shopping Patterns

- 4.13 Table 4.2 indicates that the convenience stores located within Sefton claim a combined market share of 67% of all main food shopping trips in the Study Area. A direct comparison can be made between the market shares in 2001, 2005 and 2011, which show that the



market share has increased incrementally by one percentage point at each of the study years from 64% in 2001 to 67% by 2015. This is a likely result of improvements in the retail offer in Zones B, F and S, where increased retail capacity has been provided (as set out in more detail in paragraph 4.10). In terms of individual zones, the results show that the retained market share in Zone S has been maintained at 98% since 2011. However, the market share claimed in Zone F has increased from 98% in 2011 to 99% at 2015 and there has been a consistently high level of retention in this zone since 2001. Zone C has also seen a two percentage point increase, from 94% in 2011 to 96% at 2015, which is the zone’s highest recorded market share since 2001. The largest market share gains have been made in Zone B, where the convenience facilities now retain 92% of main food trips. Zone B previously retained 86% in 2011 and 83% in 2001, demonstrating that significant improvements have been made in its main food retail offer. With regard to Zone M, the results show that although the market share has increased from that recorded in 2011 (81%) the retained main food market share is still below that recorded in 2001 and 2005. In terms of the zones outside Sefton, the retail draw of facilities in the Borough has increased since 2011 in both Zone NL and NK, although the market share in Zone O has reduced, mainly due to the improvements in facilities in Ormskirk.

Table 4.2: Main Food Shopping Market Share Analysis by Zone (%)

	Zone S	Zone F	Zone C	Zone B	Zone M	Zone NL	Zone NK	Zone O	Total
2001	97%	99%	95%	83%	87%	19%	33%	61%	64%
2005	99%	98%	94%	84%	87%	22%	39%	53%	65%
2011	98%	98%	94%	86%	81%	28%	30%	45%	66%
2015	98%	99%	96%	92%	82%	29%	32%	39%	67%

Source: Table 5.2 from Sefton RSR (2012) and Table 3, Appendix 6

4.14 Table 4.3 shows the main food market share attracted by facilities in Southport town centre, Bootle town centre, the district centres, the local centres, the local parades and out-of-centre locations. Southport and Bootle town centres now both attract 10% of the Study Area’s main food market share. However, Southport town centre’s market share has dropped by one percentage point since 2011, whereas Bootle town centre’s market share has increased by one percentage point over the same timeframe. Notwithstanding this, the influence of Southport in its immediate catchment (Zone S) has remained strong, as the main food market share has increased from 47% in 2011 to 49% in 2015. However, the



influence of Southport town centre has diminished in its surrounding secondary zones (Zones F, C, B, M and O). This is partly due to improvements to the retail offer in these zones over the last five years.

- 4.15 Despite the increase to Bootle town centre's main food market share, its market share in Zone B (its primary catchment) has decreased by two percentage points since 2011. Trade appears to have been drawn away to out-of-centre facilities, as the out-of-centre market share of Zone B has grown by four percentage points since 2011. Further analysis shows that this is primarily due to the opening of the new Asda supermarket at Strand Road, which occupies an out-of-centre location, and because of the closure of the Tesco Metro at The Strand Shopping Centre, which occupied an in-centre location. Out-of-centre market share has also increased in Zones S (+ five percentage points) and Zone C (+ 13 percentage points) and the trend is consistent with what has occurred within the wider Study Area, where the total out-of-centre main food market share has increased by two percentage points. Notwithstanding this, it is worth noting that the out-of-centre market shares of Zones F (-10 percentage points) and Zone M (- one percentage point) have decreased, as have those within the zones outside the Sefton authority area.
- 4.16 The role of local centres and shopping parades is also seen within the main food shopping market share figures. The local parade's market shares within the Study Area has increased by two percentage points since 2011 to their 2015 market share of 4%. The increases have mainly been achieved in Sefton Borough and, notably, Zone F (+ seven percentage points) and Zone C (+ 20 percentage points) have seen substantial increases. This comprises sustainable growth, as those shopping in local parades are likely to live close by. However, the market shares of local centres has decreased by two percentage points since 2011 to its 2015 level of 1% of the Study Area's market share. The lost market share derives from Zones S and B, but also from Zones NL and NK, which are outside the Sefton authority area.
- 4.17 Out-of-centre facilities in the Borough attract 32% of the main food shopping market share at 2015. This has increased by two percentage points since 2011. The level of increased main food trade to out-of-centre facilities is varied across the Study Area, with the largest gains found in Zones C (13 percentage points) and B (10 percentage points) and S (five percentage points). Further analysis shows that the main changes have occurred because of



market share advances with the Aldi at Meols Cop, which has increased its market share within the Study Area from 1.6% in 2011 to 3.1% at 2015. In Zone S, the Meols Cop Aldi main food market share has also increased from 8% in 2011 to 13% at 2015. Similarly the Aldi at Thornton has seen a substantial increase in its main food market share from 0.7% in 2011 to 3.2% at 2015. This is due to improvements at this Aldi store, as its main food market share in Zone C has grown from 7.3% in 2011 to 26.6% at 2015. This Aldi store is now the most popular store in Zone C. The general improvements to Aldi's improved trade performance within the Study Area follows a pattern that is seen nationally.

Table 4.3: Main Food Shopping Market Shares by Centre

Centre	Year	Zone S	Zone F	Zone C	Zone B	Zone M	Zone NL	Zone NK	Zone O	Total
Southport Town Centre	2015	49%	3%	0%	0%	0%	0%	0%	11%	10%
	2011	47%	9%	5%	1%	2%	0%	0%	14%	11%
Bootle Town Centre	2015	1%	0%	5%	33%	2%	17%	0%	0%	10%
	2011	0%	0%	11%	35%	0%	8%	0%	0%	9%
District Centres	2015	2%	48%	27%	7%	33%	0%	3%	2%	9%
	2011	4%	40%	47%	4%	34%	2%	1%	2%	11%
Local Centres	2015	1%	0%	2%	3%	0%	0%	0%	0%	1%
	2011	5%	0%	2%	8%	2%	2%	1%	0%	3%
Local Parades	2015	0%	8%	27%	1%	10%	0%	4%	1%	4%
	2011	2%	1%	7%	0%	6%	0%	0%	1%	2%
Out-of-Centre	2015	46%	39%	34%	48%	36%	13%	25%	26%	32%
	2011	41%	49%	21%	38%	37%	16%	28%	28%	30%
Total	2015	98%	99%	96%	92%	82%	29%	32%	39%	67%
	2011	98%	98%	94%	86%	81%	28%	30%	45%	66%

Source: 2011 data from Table 3 of Appendix 4 of RSR (2011) and Table 3 from Appendix 6. (town centres includes edge of centre facilities)

Top-Up Food Shopping Patterns

4.18 Table 4.4 provides a breakdown of the 'top-up' food shopping market share achieved by facilities within Sefton by zone. The Borough's total top-up shopping market share is 68%, which is higher than Borough's main food shopping market share (67%). This is normal given that customers generally undertake their top-up shopping needs closer to home and that people are generally more willing to travel further to meet their main food shopping needs. Sefton's top-up shopping market share has increased by 7 percentage points



between 2011 and 2015. Furthermore, the level at 2015 is now 13 percentage points above what was achieved in 2001 showing increased top-up trade retention.

4.19 The top-up food shopping market share attracted by facilities in Sefton is very high. Indeed, four of the five zones covering the Sefton Borough area retain 98% or more of their market shares. WYG note that the high retention levels are comparable to those found in 2011, although the market share in Zone B has increased from 88% in 2011 to 98% in 2015. However, in Zone M, the market share of local residents has experienced a decline from 90% in 2011 to 85% in 2015. Zone O has also seen a decline of 10 percentage points over the same timeframe. This follows a similar trend that is seen with main food shopping patterns, which is likely to be caused by improved shopping facilities in Ormskirk. Notwithstanding this, the Borough’s top up food draw has increased significantly in Zones NL and NK between 2011 and 2015, where a 15 and 16 percentage point gain has been made respectively. This is likely to have been caused by the improvements to the shopping offer in the Bootle area.

Table 4.4: Top up Food Shopping Market Share Analysis by Zone (%)

	Zone S	Zone F	Zone C	Zone B	Zone M	Zone NL	Zone NK	Zone O	Total
2001	90%	88%	83%	74%	67%	22%	7%	40%	55%
2005	98%	99%	92%	89%	88%	14%	13%	42%	61%
2011	98%	99%	99%	88%	90%	18%	7%	29%	61%
2015	100%	98%	99%	98%	85%	33%	23%	19%	68%

Source: Table 5.3 from Sefton RSR (2012) and Table 3, Appendix 6

4.20 Table 4.5 shows that Southport town centre achieves a 6% market share of top up food shopping expenditure in Sefton, which is a three percentage point decrease on its level at 2011. The main cause of the decrease is a 12 percentage point loss in retention within Zone S, which is Southport’s primary catchment zone, although losses are also experienced in Zones C and O. Notwithstanding this, Southport town centre maintains a 27% market share of top up shopping in Zone S, which is slightly above the market shares achieved at out of centre locations (26%) and local centres (25%).

4.21 Bootle town centre has seen a five percentage point growth in its top up food shopping market share within the Borough. Bootle’s market share has benefitted from a 14



percentage point increase in its market share in Zone NL, although trade also seems to have been diverted away from Southport, as a two percentage point gain has been made from Zone S. Bootle town centre's market share in its primary catchment area, Zone B, has remained at a stable level of 38% since 2011.

- 4.22 District centres contribute 14% of the top up food shopping market share within the Borough. A large proportion of this comes from Zones F, C and M where the majority of market share originates from district centre shopping facilities. However, these three zones have seen reductions of between seven and 12 percentage points in the amount of market share going to the district centres since 2011.
- 4.23 Local centres now comprise 8% of top up food shopping market share in Sefton, which is the same as the 2011 level. However, local centres in Zones S and B appear to have gained market share since 2011 by nine and three percentage points respectively. Furthermore, local parades have gained two percentage points of market share within the Borough with four of the five zones in the Sefton authority area experienced market share growth in their local parades. Zone F in particular has seen substantial growth in its local parades with the level growing from 6% in 2011 to 22% in 2015.
- 4.24 Out of centre top up food shopping in the Borough has also grown from 13% in 2011 to 18% in 2015. Three zones in the Sefton authority area have seen out of centre growth, which are Zone C (+5%) and Zone B (+11%) and Zone M (+10%).



Table 4.5: Top Up Food Shopping Market Shares by Centre

Centre	Year	Zone S	Zone F	Zone C	Zone B	Zone M	Zone NL	Zone NK	Zone O	Total
Southport Town Centre	2015	27%	3%	0%	0%	1%	0%	0%	8%	6%
	2011	39%	2%	1%	0%	1%	0%	0%	11%	9%
Bootle Town Centre	2015	2%	0%	5%	38%	0%	22%	0%	0%	13%
	2011	0%	0%	6%	38%	0%	8%	0%	0%	8%
District Centres	2015	1%	62%	73%	5%	41%	1%	2%	1%	14%
	2011	2%	74%	80%	2%	49%	2%	0%	6%	17%
Local Centres	2015	25%	0%	0%	17%	5%	0%	0%	1%	8%
	2011	16%	0%	1%	14%	9%	2%	0%	3%	8%
Local Parades	2015	20%	22%	10%	5%	15%	1%	15%	2%	9%
	2011	14%	6%	5%	11%	18%	0%	0%	0%	7%
Out-of-Centre	2015	26%	12%	10%	34%	23%	9%	7%	7%	18%
	2011	27%	16%	5%	23%	13%	16%	6%	8%	13%
Total	2015	100%	98%	99%	98%	85%	33%	23%	19%	68%
	2011	98%	99%	99%	88%	90%	18%	7%	29%	61%

Source: 2015 market shares derived from Table 3, Appendix 6 (2015 Study) and 2011 market shares derived from the Sefton Retail Strategy Review Update (WYG, 2012).

Convenience Goods Shopping Patterns

- 4.25 In considering shopping patterns, it is important to note the proportion of the Study Area population that reside within Sefton Borough. This is because assuming that there is a relatively even and sustainable distribution of facilities across the Study Area and beyond, it might be expected that the market share claimed by Sefton Borough will be broadly commensurate with its population. In this regard, we note that the population of Zones S, F, C, B and M, which broadly correspond to Sefton’s administrative boundary, have a population of 267,800 at 2015. The population of Sefton equates to 56.5% of the overall 2015 Study Area population of 474,390. Accordingly, it might be expected – given that shoppers typically seek to use food shopping facilities close to home – that Sefton’s food shopping facilities would gain a broadly similar market share of overall trips.
- 4.26 As we have set out above, facilities in Sefton achieve a main food shopping market share of 67% and a top-up shopping market share of 68% from the Study Area. Accordingly, Sefton secures a greater number of main food shopping trips than we might expect and a comparable amount of top-up shopping trips to that which may be expected.



Notwithstanding this, although the main food shopping market share achieved by facilities in Sefton has remained relatively stable since 2011, the top-up shopping market share has increased by 7.0 percentage points. In both sections, Sefton clearly performs a role that extends beyond its resident population.

Non-Food (Non-Bulky) Shopping Patterns

- 4.27 The household survey also assessed shopping patterns for a variety of non-food or comparison goods. Such goods include non-bulky goods (clothing and footwear, small household goods, books, CDs and DVDs, recreational and toy goods and chemist goods) and bulky goods (electrical goods, furniture goods and DIY goods). It is therefore possible to analyse the broad location of where people were shopping for non-bulky and bulky goods and whether they undertook their shopping in town centres or at out of centre locations.
- 4.28 Table 4.6 shows that Sefton's non-bulky goods market share within the study is 52% at 2015, which comprises a reduction of one percentage point since 2011. However, Sefton's market share is still above the levels that were seen in 2001 and 2005. The main cause of the reduction is that the market share in each of the Sefton zones (Zones S, F, C, B and M) have fallen since 2011. The largest fall has been in Zone F where the market share has reduced by eight percentage points within that timeframe to 65% at 2015. The market share of this zone is also now below what it was in 2001. The issue has been compounded in Zones S and F, which both also experienced market share reductions in 2011.
- 4.29 The amount of in centre market share in Zones B and M are of particular note, as the level has fallen in each of the study years since 2001. Furthermore, Zones C, B and M have received out of centre market share growth in each study year between 2001 and 2015 with the only exception being Zone B between 2011 and 2015, where the out of centre market share dropped by one percentage point.
- 4.30 An opposite trend is seen to the south of the Borough in Zone NL. This zone has received growth of eight percentage points in its non-bulky market share since 2011. This has followed growth in the out of centre market share in each study year since 2001, which reflects the improved offer at Liverpool One. A similar pattern is seen in Zone NK, although the rate of market share growth in this zone has slowed down to a one percentage point

increase since 2011. The non-bulky market share of Zone O, however, has reduced in every study year since 2001 from 62% in 2001 to 43% in 2015. The losses in Zone O have come from in centre locations, such as Ormskirk and Aughton.

Table 4.6: Non-Bulky Goods Market Share Analysis by Zone (%)

	Year	Zone S	Zone F	Zone C	Zone B	Zone M	Zone NL	Zone NK	Zone O	Total
2001	In Centre	65%	55%	26%	40%	29%	14%	4%	60%	36%
	Out-of-centre	3%	14%	7%	4%	8%	3%	1%	2%	4%
	Total	68%	69%	33%	44%	37%	17%	5%	62%	40%
2005	In Centre	84%	71%	33%	34%	28%	7%	3%	49%	39%
	Out-of-centre	7%	6%	8%	11%	11%	4%	11%	4%	7%
	Total	91%	77%	41%	45%	39%	11%	14%	53%	46%
2011	In Centre	75%	65%	43%	31%	24%	5%	4%	34%	36%
	Out-of-centre	14%	9%	17%	22%	28%	16%	18%	15%	17%
	Total	89%	73%	60%	53%	52%	20%	22%	49%	53%
2015	In Centre	78%	58%	33%	29%	18%	8%	2%	32%	35%
	Out-of-centre	9%	8%	23%	21%	29%	19%	21%	11%	17%
	Total	87%	65%	57%	50%	48%	28%	23%	43%	52%

Source: WYG and NEMS (adjusted to nearest percentage point)

- 4.31 Table 4.7 shows non-bulky goods market shares for North Sefton. This area comprises Zones S and F and includes Southport town centre and Formby district centre. North Sefton's market share has decreased by three percentage points since 2011 and now stands at 28%, which is the same level it was at in 2001. The reduction has primarily been experienced in town centre locations, which have reduced by two percentage points since 2011, although out of centre locations have also reduced by one percentage point over this timeframe. Reductions in market share are seen in each of the eight zones between 2011 and 2015 with Zones F and M having the largest respective losses of nine and ten percentage points.

Table 4.7: Non-Bulky Goods Market Share Analysis by Zone (%) – North Sefton

	Year	Zone S	Zone F	Zone C	Zone B	Zone M	Zone NL	Zone NK	Zone O	Total
2001	In Centre	64%	53%	16%	5%	22%	3%	2%	60%	26%
	Out-of-centre	3%	11%	1%	1%	3%	0%	0%	1%	2%
	Total	67%	64%	17%	6%	25%	3%	2%	61%	28%
2005	In Centre	83%	69%	21%	4%	19%	1%	2%	48%	30%
	Out-of-centre	7%	5%	1%	1%	0%	0%	0%	0%	2%
	Total	90%	74%	22%	5%	19%	1%	2%	50%	32%
2011	In Centre	75%	63%	19%	3%	14%	2%	1%	33%	27%
	Out-of-centre	13%	6%	0%	0%	1%	0%	0%	4%	4%
	Total	88%	69%	19%	3%	15%	2%	1%	38%	31%
2015	In Centre	77%	57%	8%	1%	5%	0%	1%	32%	25%
	Out-of-centre	8%	3%	3%	0%	0%	0%	0%	4%	3%
	Total	85%	60%	11%	1%	5%	0%	1%	36%	28%

Source: WYG and NEMS (adjusted to nearest percentage point)

- 4.32 Table 4.8 shows 'non-bulky' goods market shares for South Sefton. This area comprises Zones C, B and M and includes Bootle town centre and Maghull, Crosby and Waterloo district centres. South Sefton's market share has increased to 24% at 2015, a two percentage point since 2011. This follows increases in the areas market share in each study year since 2001, when South Sefton's market share was 12%. The recent growth can be attributed to both in centre and out of centre locations, which have both had market share increases of a percentage point since 2011. Growth is seen in four of the eight zones, but significant growth of eight percentage points has been claimed in Zone NL. Better retention of non-bulky trade in Zones C and M has also lead to their market shares growing by four and six percentage points respectively. South Sefton's market share growth has primarily been driven by strengthening facilities in and around Bootle.



Table 4.8: Non-Bulky Goods Market Share Analysis by Zone (%) – South Sefton

	Year	Zone S	Zone F	Zone C	Zone B	Zone M	Zone NL	Zone NK	Zone O	Total
2001	In Centre	1%	2%	10%	35%	7%	11%	2%	0%	10%
	Out-of-centre	0%	3%	5%	4%	5%	3%	1%	1%	2%
	Total	1%	5%	15%	39%	12%	14%	3%	1%	12%
2005	In Centre	1%	2%	12%	29%	10%	6%	1%	1%	8%
	Out-of-centre	0%	0%	7%	11%	11%	3%	11%	2%	5%
	Total	1%	2%	19%	40%	21%	9%	12%	3%	13%
2011	In Centre	0%	2%	24%	28%	10%	3%	2%	1%	9%
	Out-of-centre	1%	3%	17%	22%	27%	16%	18%	10%	13%
	Total	1%	4%	41%	51%	37%	19%	20%	11%	22%
2015	In Centre	1%	1%	25%	28%	14%	8%	1%	0%	10%
	Out-of-centre	1%	5%	20%	21%	29%	19%	21%	7%	14%
	Total	1%	5%	45%	49%	43%	27%	23%	7%	24%

Source: WYG and NEMS (adjusted to nearest percentage point)

Non-food (Bulky) Shopping

4.33 In addition to assessing shopping patterns for convenience goods and non-bulky comparison goods, it is also possible to assess shopping patterns for 'bulky goods' within the three broad categories of 'Electrical', 'Furniture' and 'DIY Goods'.

4.34 Table 4.9 shows that Sefton's bulky goods market share within the Study Area was 69% at 2015, which comprises a one percentage point increase since 2011. The growth can be attributed to strengthening trade in out of centre locations, which now account for 48% of the Study Area's market share, the level previously being 47%. There has also been a substantial increase in bulky goods market share drawn from outside the Sefton authority area, as the market shares of Zones NL and NK have increased by six and eight percentage points respectively. The level of in centre bulky goods market share has remained at 21% since 2011. However, within Sefton Borough the picture is quite different. Although the market share of Zone B has remained as it was in 2011, each of the other Sefton zones



have seen market shares reductions since 2011. The largest losses are seen in Zones F, which has lost 10 percentage points, and Zone M, which has lost six percentage points.

- 4.35 A large proportion of the market share losses in the Sefton authority area zones have come from out of centre locations, which is seen in Zones S, F, B and M. Some of this trade may have been diverted to town centre locations, as Zones S, F and B have all seen increases in their town centre market share.

Table 4.9: Bulky Goods Market Share Analysis by Zone (%)

		Zone S	Zone F	Zone C	Zone B	Zone M	Zone NL	Zone NK	Zone O	Total
2011	In Centre	39%	42%	31%	15%	18%	6%	4%	16%	21%
	Out-of-centre	50%	40%	42%	62%	60%	40%	49%	36%	47%
	Total	89%	82%	73%	77%	78%	46%	53%	51%	68%
2015	In Centre	42%	43%	25%	17%	14%	5%	6%	14%	21%
	Out-of-centre	44%	30%	46%	61%	58%	53%	54%	32%	48%
	Total	86%	72%	71%	77%	72%	57%	61%	46%	69%

Source: WYG and NEMS (adjusted to nearest percentage point)

- 4.36 In terms of North Sefton, Table 4.10 shows that as of 2015 the overall market share for the area stood at 26%, which comprises a one percentage point decrease since 2011. Although there has been an increase in town centre market share since 2011, the gains are outweighed by the reductions to the out of centre market share. Zones S and F retain the largest market shares in North Sefton, with 83% and 57% respectively. However, both zones have received substantial losses to their overall market share since 2011, as Zone S has lost three percentage points and Zone F has lost 12 percentage points. The losses are mainly experienced in the out of centre locations. Zone O, however, continues to retain a large proportion of North Sefton’s market share with a total of 32%, although its market share has reduced by three percentage points since 2011. On the other hand, Zone NL has also seen an increase from 1% in 2011 to 3% in 2015.

Table 4.10: Bulky Goods Market Share Analysis by Zone (%) – North Sefton

		Zone S	Zone F	Zone C	Zone B	Zone M	Zone NL	Zone NK	Zone O	Total
2011	In Centre	39%	41%	5%	1%	2%	0%	1%	14%	13%
	Out-of-centre	47%	28%	1%	0%	1%	0%	0%	21%	14%
	Total	86%	69%	6%	1%	4%	0%	1%	35%	27%
2015	In Centre	40%	40%	5%	1%	2%	0%	2%	14%	14%
	Out-of-centre	43%	18%	3%	0%	1%	0%	1%	18%	13%
	Total	83%	57%	8%	1%	3%	0%	3%	32%	26%

Source: WYG and NEMS (adjusted to nearest percentage point)

4.37 In terms of South Sefton, the bulky goods market share has increased by one percentage point since 2011. This is derived from an overall two percentage point increase in the area’s out of centre market share, although the in centre market share has decreased by one percentage point. In particular, the market shares drawn from Zones NL and NK have grown substantially since 2011 and facilities in Sefton now claim 57% of the market share from these zones. Zones C, B and M continue to retain the largest amount of market share for South Sefton, although Zones C and M have seen market share reductions since 2011 of three percentage points and six percentage points respectively.

Table 4.11: Bulky Goods Market Share Analysis by Zone (%) – South Sefton

		Zone S	Zone F	Zone C	Zone B	Zone M	Zone NL	Zone NK	Zone O	Total
2011	In Centre	0%	1%	26%	14%	16%	6%	4%	2%	8%
	Out-of-centre	2%	12%	41%	62%	58%	40%	49%	14%	33%
	Total	3%	13%	67%	76%	74%	46%	53%	16%	41%
2015	In Centre	1%	3%	20%	16%	11%	5%	5%	0%	7%
	Out-of-centre	1%	12%	43%	60%	57%	53%	53%	14%	35%
	Total	3%	15%	63%	76%	68%	57%	57%	14%	42%

Source: WYG and NEMS (adjusted to nearest percentage point)

Comparison Goods Shopping Patterns

- 4.38 Table 4.12 shows the total comparison goods market share within the Study Area, which stands at 57% at 2015. However, the comparison goods market share has decreased by two percentage points since 2011. This can be attributed to reductions to out of centre market share, which decreased from 28% in 2011 to 26% in 2015.
- 4.39 Southport town centre retains the largest proportion of comparison goods market share in the Study Area for in centre locations, although its total has also decreased from 19% in 2011 to 18% in 2015. Notwithstanding this, the retention rate of Southport town centre in Zone S has increased from 59% in 2011 to 62% in 2015. However, Southport's market share has fallen in all other zones except NK, where it has remained stable. This demonstrates that Southport has strengthened its comparison goods market share in its primary catchment area but it has lost ground in its secondary catchment area.
- 4.40 The market shares of Bootle town centre and the district centres, however, have both received two percentage point increases since 2011 in the Study Area. Bootle town centre's retention rate has also seen an increase since 2011 from 13% to 21% in Zone B, its primary catchment area. In addition, Bootle has gained six percentage points in Zone NL, although its market share has fallen by the same margin in Zone C.
- 4.41 Out of centre comparison goods market share has decreased in four of the five Sefton zones since 2011. The largest decreases have been experienced by Zones S and F, which have lost eight and six percentage points respectively. Zone C is the only zone in the Borough where the out of centre comparison goods market share has grown. However, the market shares of Sefton's out of centre facilities drawn from Zones NL and NK (which are both outside the Sefton authority area) have both increased since 2011 by six and one percentage point respectively.



Table 4.12: Comparison Goods Shopping Market Shares by Centre

Centre	Year	Zone S	Zone F	Zone C	Zone B	Zone M	Zone NL	Zone NK	Zone O	Total
Southport Town Centre	2015	62%	22%	6%	1%	3%	0%	1%	25%	18%
	2011	59%	28%	11%	2%	9%	1%	1%	26%	19%
Bootle Town Centre	2015	0%	0%	3%	21%	1%	7%	0%	0%	5%
	2011	0%	1%	9%	13%	1%	1%	1%	0%	3%
District Centres	2015	1%	31%	16%	1%	10%	0%	2%	1%	6%
	2011	1%	23%	11%	1%	6%	0%	0%	1%	4%
Local Centres	2015	3%	0%	1%	1%	0%	0%	1%	0%	1%
	2011	2%	1%	0%	0%	0%	0%	1%	1%	1%
Local Parades	2015	0%	0%	5%	1%	3%	0%	0%	0%	1%
	2011	1%	4%	8%	9%	5%	2%	2%	1%	4%
Out-of-Centre	2015	19%	14%	30%	32%	38%	29%	30%	17%	26%
	2011	27%	20%	26%	36%	39%	24%	29%	22%	28%
Total	2015	86%	67%	61%	57%	55%	36%	34%	44%	57%
	2011	89%	76%	64%	62%	61%	30%	33%	50%	59%

Source: 2015 market shares derived from Table 30, Appendix 7 (2015 Study) and 2011 market shares derived from the Sefton Retail Strategy Review Update (WYG, 2012).

4.42 As we set out in relation to convenience goods, in considering shopping patterns, it is relevant to note the proportion of the Study Area population which resides within Sefton Borough, as assuming a relatively even and sustainable distribution of facilities across the Study Area and beyond, it might be expected that the market share claimed by Sefton Borough will be broadly commensurate with its population. Based on the population of Zones S, F, C, B, and M, which roughly correspond to Sefton’s administrative boundary, having a population of 267,800 at 2015 and given the estimated Study Area population of 474,390 at 2015, we estimate that 56.5% of the Study Area population reside in Sefton. Accordingly, one might expect Sefton Borough to claim around 56.5% (or thereabouts) of shopping trips in any one goods category. With a claimed market share of 57% the level of comparison goods trade is in line with the population of the Borough and therefore seems to be balanced. However, we note that the area’s market share has decreased by two percentage points since 2011.



Special Forms of Trading (SFT)

- 4.43 The household survey identifies that 2.1% of respondents last undertook their main food shop using the internet. This is an increase from 2011, when 1.8% undertook their main food shopping via the internet. WYG note that the results from the household survey showed that 100% of those buying main food shopping over the internet had the goods delivered to their home. The results showed that very limited top-up food items were bought over the internet.
- 4.44 Household respondents were asked whether they undertook home internet shopping, mobile internet shopping or TV shopping. 56% of household confirmed that they undertake home internet shopping, with 28% stating that they undertook portable internet shopping, with just 3% using TV platforms. The results found that 35% of households did not undertake such shopping activity. This compares to 48% in 2012, of which 46% confirmed that they undertook internet shopping at home. The results demonstrate that households in Sefton are undertaking more purchases via home or mobile shopping platforms.
- 4.45 In terms of clothing and footwear, 10.6% of respondents to the household survey last purchased such goods via the internet, which is an increase of 6.0 percentage points since 2011. This was the second largest recorded increase, with only electrical goods having higher internet sales. For small household goods, 8.4% of respondents last purchased such goods using the internet, this compares to 12.8% for recreational goods, and both had seen five percentage point increases since 2011. The percentage of respondents who last purchasing electrical goods via the internet has increased from 8.1% in 2011 to 16.4% in 2015, the highest goods type to be bought by the internet. This compares to 3.1% of respondents who last purchased DIY goods via the internet (an increase of 2.7 percentage points since 2011) and 5.2% of respondents who last purchased furniture goods via the internet (an increase of 2.2 percentage points since 2011). The proportion of respondents who last purchased chemist goods using the internet have increased by 4.1 percentage points, from 1.9% in 2011 to 6.0% in 2015. In terms of delivery of comparison goods sold through internet or mobile platforms, the results showed that 10% of respondents collected their goods at the store, with 1% using click and collect services. However, the majority of respondents had goods delivered to their home.



Table 4.13: Special Forms of Trading

	SFT (%)		
	2011	2015	Difference
Main Food Shopping	1.8	2.1	+0.3
Top-Up Shopping	0.2	0.3	+0.1
Clothing & Footwear	4.6	10.6	+6.0
Small Household Goods	3.4	8.4	+5.0
Recreation Goods, Toys etc	7.9	12.8	+4.9
Chemist	1.9	6.0	+4.1
Electrical Goods	8.1	16.4	+8.3
DIY Goods	0.4	3.1	+2.7
Furniture	3.0	5.2	+2.2

Source: NEMS Household Survey 2015 (weighted data)

Source NEMS Household Survey 2011 (weighted data)

- 4.46 When respondents were asked why they chose to shop online, the most popular (26%) answer was due it being less time consuming, 12% stated due to better prices, 11% due to better choice and 9% due to it being available 24/7. Interestingly 9% stated that it allowed prices to be compared and reviewed.
- 4.47 It is evident from the household survey results that the purchase of food and comparison goods over the internet is generally becoming increasingly more popular in Sefton, which reflects wider national trends, although bulky goods items are less likely to be sold through the internet than non-bulky or smaller items.

Summary of Original Market Research

- 4.48 Sefton’s shopping facilities claim 67% of main food market share and 68% of top-up market share within the study area. When considered against the population of the Borough, this is approximately 10 and 11 percentage points (respectively) higher than the resident proportion of the Borough against the Study Area. The main food market share has increased by one percentage point in each of the study years since 2001. Southport and Bootle town centres now both attract 10% of the Study Area’s main food market share. However, Southport town centre’s market share has dropped by one percentage point since 2011, whereas Bootle town centre’s market share has increased by one percentage point over the same timeframe. The main food market share of local centres has decreased by one percentage point since 2011 to its 2015 total of 1%. However, the market share of local parades has increased from 2% in 2011 to 4% in 2015. The Borough’s out-of-centre



facilities attract 32% of the main food shopping market share at 2015, an increase of two percentage points since 2011.

- 4.49 Sefton's top-up food shopping market share has increased by 7 percentage points between 2011 and 2015. Furthermore, the level at 2015 is now 13 percentage points above what was achieved in 2001. Four of the five zones covering the Sefton authority area retain 98% or more of their market shares and the high retention levels are comparable to those found in 2011. This demonstrates high trade retention and limited expenditure leakage. Southport town centre's top-up market share has decreased by three percentage points since 2011, with trade being diverted to local centres and shopping parades elsewhere in Zone S (Southport's primary catchment area). However, as of 2015, Bootle town centre's top-up food shopping market share had increased to 13% and the market share of out-of-centre shopping facilities within the Study Area has increased to 18%, both of which have increased by five percentage points since 2011. The district centres claim the majority of the top-up market shares for Zones F, C and M, although the 2015 market shares in these zones have all decreased by between seven and twelve percentage points since 2011.
- 4.50 As of 2015, Sefton's non-bulky goods market share within the study was 52%, which comprises a one percentage point decrease since 2011. This is due to the market shares of every zone within the Sefton authority decreasing since 2011. Furthermore, in centre locations in Zone B (Bootle) and Zone M (Maghull) have lost non-bulky market share in each study year since 2001. The market share has been diverted to out-of-centre shopping facilities in Sefton Borough and to both in and out-of-centre facilities in the areas surrounding the Borough, particularly to Liverpool city centre and Ormskirk. North Sefton's non-bulky goods market share has decreased by three percentage points since 2011 and the 2015 market share of 28% is now as it was in 2001. South Sefton's non-bulky market share, however, has doubled from 12% in 2001 to 24% in 2015, an increase of two percentage points since 2011. This can be attributed to strengthening facilities in and around Bootle.
- 4.51 Sefton's bulky goods market share within the Study Area has increased by one percentage point since 2011 to 69% at 2015. This is higher than both the Borough's main food and top-up shopping market shares. The growth is attributed to improvements in the Borough's out-of-centre facilities and their trade draw from outside the administrative area. However, the



Borough's bulky goods retention rates have declined inside the Sefton authority area. The North Sefton bulky goods market share has decreased by one percentage point since 2011 to 26% at 2015. On the other hand, South Sefton's bulky goods market share has increased by one percentage point to its 2015 level of 42%. This can be attributed to trade draw to the area's out-of-centre shopping facilities and from North Liverpool.

- 4.52 Sefton's comparison goods market share of the Study Area has decreased to 57% at 2015, a two percentage point reduction from the 2011 level. However, the comparison goods market share remains in line with the population of the Borough and seems to be balanced. Southport town centre retains the largest proportion of in-centre comparison goods market share, although its total has also decreased from 19% in 2011 to 18% in 2015. As of 2015, Bootle town centre claims 5% of the Study Area's comparison goods market share and the district centres claim 6%, which for both comprises a two percentage point increase on the respective 2011 market shares. However, the comparison goods market share for out-of-centre facilities has decreased by two percentage points since 2011 to the 2015 level of 26%. However, the out-of-centre facilities still comprise the largest proportion of comparison goods market share in the authority area.



5.0 Health Check Assessments

5.01 The NPPF identifies a number of factors which will be of relevance in delivering sustainable development, with one such factor being the need to ensure the vitality of town centres. Paragraph 23 of the NPPF states that local authorities should promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. Paragraph 23 also requires local planning authorities to recognise that town centres are at the heart of their communities and to pursue policies that support their viability and vitality. It is also noted that competitive town centre environments should be promoted in order to enhance customer choice, provide a diverse retail offer and in order to reflect the individuality of town centres.

5.02 Whilst the NPPF does not provide a list of indicators to be used to assess the health of a centre, such criteria has been published in the Government's Planning Practice Guidance: Ensuring the Vitality of Town Centres. Indicators which should be monitored on a regular basis in order to judge the health of a centre and its performance over time include the following:

- **Diversity of uses** – Data on the diversity of uses in the town centre was collated during our surveys of the centres in May 2015 (town centres), July 2015 (district centres) and 2012 (local centres and shopping parades).
- **Proportion of vacant street level property** – Vacant properties were identified during the undertaking of the surveys.
- **Customers' views and behaviour** – Information on customers' views is based on the NEMS Household survey results, as set out in Section 4.
- **Retailer representation and intentions to change representation** – Information on the current strength of centres, retailer representation and retailer requirements has been derived from Venuescore's UK Shopping Venue Rankings, Goad's list of top comparison retailers, WYG's own research and other published sources.
- **Commercial rents** – Information on commercial rents has been sourced from Estates Gazette Interactive (EGi), a nationally recognised source, as well as local property experts.
- **Pedestrian flows** – Data has been provided by Sefton Council on the number of users using Council operated car parks. Footfall data has also been provided by the



management of the Strand shopping centre in Bootle. General footfall and pedestrian flows were also observed during the undertaking of the centre surveys.

- **Accessibility** – Consideration of access to and around each centre is informed by WYG’s surveys.
- **State of town centre environmental quality and perceptions of safety** – Consideration of the quality of the buildings and public realm in each of the centres has also been informed by WYG’s ‘on the ground’ observations.

5.03 We have also had particular regard to the proliferation of vacant land and premises and the opportunities which may exist for future growth in Sefton Borough. The commentary below provides an analysis in respect of each of the above indicators with regard to Sefton Borough’s two town centres and four district centres, as defined by the Draft Sefton Local Plan (Publication Draft, January 2015). A strategic overview of the Borough’s local centres and shopping parades is also provided, drawing from the Sefton District Centres, Local Centres and Shopping Parades Study (WYG, May 2012).

5.04 We commence our assessment by considering the role of the Borough’s centres within the sub-regional shopping hierarchy.

Sub-Regional Retail Hierarchy

5.05 Table 5.1 illustrates the position of the sub-region’s principal centres based on the Venuescore’s UK Shopping Venue Rankings 2014-15. Venuescore’s index ranks 3,081 retail venues within the UK (including town centres, stand-alone malls, retail warehouse parks and factory outlet centres) based on the strength of their current retail provision. Towns and major shopping centres are rated using a scoring system which takes account of the presence in each location of multiple retailers – including anchor stores, fashion operators and non-fashion multiples.

5.06 Venuescore allocates each centre within a tier, reflecting its level of retail provision. The eight tiers comprise (highest to lowest): ‘Major City’, ‘Major Regional’, ‘Regional’, ‘Sub-Regional’, ‘Major District’, ‘District’, ‘Minor District’ and ‘Local’. The rankings in the table represent the position of the centres at the time of the most recent 2014/15 Rankings, as well as competing surrounding destinations. The market position index and classification, as



set out in the below table, provides an indication as to whether a retail venue's focus is upmarket (luxury goods) or more downmarket (discount stores).

- 5.07 Southport is a major seaside resort and its town centre is an important retail hub within the North West region. 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 town centre's Venuescore has increased by 11 points over that time period. 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 authority area and is identified as the only 'Regional' centre in the Borough. The town centre ranks between the other neighbouring 'Regional' centres of Blackpool (83rd) and Wigan (108th). Liverpool city centre, which is ranked 5th in the country by Venuescore is also a significant centre within the sub-region.
- 5.08 Bootle town centre has a Venuescore of 108 points and is ranked 235th in the country. The centre's ranking position has improved by 8 places since 2010 with an increase in the Venuescore of 25 points. Bootle is the second highest ranked centre in the Sefton local authority area and is identified as the only 'Sub-Regional' centre in the Borough, which provides an indication of the centre's important role in the southern part of the Borough.
- 5.09 Formby is classed by Venuescore as a 'District' centre and is the third highest scoring centre in the authority area, followed by Maghull and Crosby, which are both classified as 'Minor Districts', and Waterloo, which is classified as a 'Local' centre. The role of retail parks is also clearly visible within the hierarchy, with Aintree Retail Park being classified as a 'Major District' and Central 12 Shopping Park being classified as a 'Minor District' in their own right.
- 5.10 Sefton's retail parks also feature strongly within the sub-region, with Aintree Retail Park having the third highest ranking in the Borough. Central 12 Shopping Park, Kew Retail Park, Meols Cop Retail Park and Ocean Plaza Shopping Park are all located in Southport and all feature within the Venuescore rankings, supplementing Southport town centre's retail offer.

Table 5.1: Venuescore’s 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
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
Central 12 Shopping Park, Southport	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, Southport	18	Local	1,493	1,383	1,599	+106	Lower Middle
Ocean Plaza Shopping Park, Southport	17	Local	1,499	1,452	1,680	+181	Middle

Source: Venuescore 2014-15 and 2013-14 UK Shopping Venue Rankings (Javelin Group)

5.11 A large part of Sefton’s economy is based within the tourism sector, due to the area’s coastal location and Southport being a national tourist destination. In 2014, Sefton received 5.48 million tourist visits and the number of visits has grown by 0.96 million since 2011, a 21.2% increase. Over the same time period, the level of tourist expenditure in the Borough’s economy has also almost doubled from £96.0 million in 2011 to £185.5 million in 2014³¹.

5.12 Tables 5.2 and 5.3 show the diversity of uses within Sefton’s retail centres. In terms of the number of units and the amount of retail floorspace, Southport is by far the largest centre in the Borough. WYG’s survey identified a total of 742 units within Goad’s defined town centre

³¹ Source: Visit England Day Visitor Statistics



boundary, comprising 149,591 sq.m gross floorspace. Bootle is the Borough's second largest town with 204 units totalling 51,751 sq.m gross floorspace.

- 5.13 Sefton Borough also contains four district centres, seven local centres and 94 shopping parades, which all have a valuable contribution to the day-to-day retail needs of the Borough. The four district centres range in size between 91 and 210 units (14,182 and 27,839 sq.m) and the seven local centres have a combined total of 349 retail units, which occupy 44,307 sq.m gross floorspace. Furthermore, there are 1,229 units within the 94 shopping parades, which comprise a further 114,770 sq.m gross floorspace. This is over three quarters of the amount of floorspace in Southport town centre.
- 5.14 In terms of the proportion of convenience units, only Southport and Maghull have lower percentages than the national average. However, the comparison goods offer of Southport and Formby are above the national average, although Bootle's offer is two percentage points below. As would be expected, the retail service offers of the district and local centres and shopping parades are above the national average. Sefton's role as a tourist destination is also reflected in the leisure service offer of Southport, Crosby and Waterloo being above the national average. In terms of financial and business services, the district centres all have lower proportions than the national average with only 2.8% of units in Formby being in this sector. Southport, Bootle and the local centres and shopping parades all have vacancy rates above the national average.

Table 5.2: Number of Units within Sefton Retail Centres

	Convenience	Comparison	Retail Service	Leisure Services	Financial & Business Service	Vacant	TOTAL NUMBER OF UNITS
NATIONAL AVERAGE	8.5%	32.4%	14.2%	22.5%	10.8%	11.4%	-
Southport town centre	48 (6.5%)	265 (35.7%)	89 (12.0%)	178 (24.0%)	65 (8.8%)	97 (13.1%)	742
Bootle town centre	19 (9.3%)	62 (30.4%)	21 (10.3%)	31 (15.2%)	24 (11.8%)	47 (23.0%)	204
Crosby district centre	10 (8.6%)	23 (19.8%)	23 (19.8%)	34 (29.3%)	14 (12.1%)	12 (10.3%)	117
Formby district centre	11 (10.3%)	39 (36.4%)	18 (16.8%)	22 (20.6%)	14 (13.1%)	3 (2.8%)	107
Maghull district centre	7 (7.7%)	22 (24.7%)	18 (20.2%)	14 (15.7%)	19 (21.3%)	9 (10.1%)	91
Waterloo district centre	19 (9.0%)	61 (29.0%)	34 (16.2%)	67 (31.9%)	9 (4.3%)	20 (9.5%)	210
7 local centres (Combined)	47 (13.5%)	85 (24.4%)	73 (20.9%)	62 (17.8%)	36 (10.3%)	46 (13.2%)	349
94 shopping parades (Combined)	180 (14.6%)	223 (18.1%)	292 (23.8%)	236 (19.2%)	71 (5.8%)	227 (18.5%)	1,229
Total	341 (11.2%)	780 (25.6%)	568 (18.6%)	644 (21.1%)	252 (8.3%)	463 (15.2%)	3,049

* Town and district centre figures recorded from WYG surveys in May 2015 and July 2015 respectively. Local centre and shopping parade figures taken from Sefton District Centres, Local Centres & Shopping Parades Retail Study (WYG, May 2012).

* UK average from the Experian Goad Category Report (April 2015)

5.15 In terms of the proportion of convenience floorspace, Southport and Waterloo are the only centres to have lower percentages than the national average. Southport; however, is the only centre to have a higher proportion of comparison goods floorspace than the national average, reflecting its role as a regional shopping destination. Southport, Bootle and Formby all have lower proportions of retail service floorspace than the national average, but only Southport and Waterloo have higher proportions of leisure service floorspace than the national average. In terms of financial and business service floorspace, only Crosby, Formby and Maghull district centres have higher percentages than the national average. As with the proportion of

units, Southport, Bootle and the local centres and shopping parades have higher proportions of vacant floorspace than the national average.

Table 5.3: Amount of Floorspace within Sefton Retail Centres (sq.m, gross)

	Convenience	Comparison	Retail Service	Leisure Services	Financial & Business Service	Vacant	TOTAL FLOORSPACE (SQ.M)
NATIONAL AVERAGE	15.1%	36.1%	7.4%	23.3%	8.2%	9.2%	-
Southport town centre	16,930 (11.3%)	57,120 (38.2%)	7,116 (4.8%)	35,717 (23.9%)	10,292 (6.9%)	22,416 (15.0%)	149,591
Bootle town centre	11,873 (22.9%)	17,175 (33.2%)	2,731 (5.3%)	8,198 (15.8%)	3,714 (7.2%)	8,060 (15.6%)	51,751
Crosby district centre	3,920 (21.1%)	3,951 (21.2%)	3,352 (18.0%)	4,254 (22.9%)	1,847 (9.9%)	1,269 (6.8%)	18,593
Formby district centre	6,225 (35.1%)	4,956 (27.9%)	1,184 (6.7%)	2,820 (15.9%)	2,269 (12.8%)	279 (1.6%)	17,733
Maghull district centre	2,574 (19.1%)	3,725 (27.7%)	2,093 (15.6%)	1,991 (14.8%)	1,922 (14.3%)	1,145 (8.5%)	13,450
Waterloo district centre	4,038 (14.5%)	7,492 (26.9%)	3,093 (11.1%)	9,930 (35.7%)	906 (3.3%)	2,380 (8.5%)	27,839
7 Local Centres (Combined)	8,133 (18.4%)	12,443 (28.1%)	6,818 (15.4%)	9,000 (20.3%)	3,356 (7.6%)	4,557 (10.3%)	44,307
94 Shopping Parades (Combined)	19,659 (17.1%)	23,988 (20.9%)	24,300 (21.2%)	23,031 (20.1%)	7,194 (6.3%)	16,598 (14.5%)	114,770
Total	73,352 (16.7%)	130,850 (29.8%)	50,687 (11.6%)	94,941 (21.6%)	31,500 (7.2%)	57,436 (13.1%)	438,766

* Town and district centre figures recorded from WYG surveys in May 2015 and July 2015 respectively. Local centre and shopping parade figures taken from Sefton District Centres, Local Centres & Shopping Parades Retail Study (WYG, May 2012).

* UK average from the Experian Goad Category Report (April 2015)

- 5.16 The full health check assessments of Southport, Bootle and the four district centres are contained at Appendix 3, 4 and 6. Full health checks of the local centres and shopping parades are also available in Appendix 2 and 3 of the Sefton District Centres, Local Centres & Shopping Parades Retail Study (WYG, May 2012).
- 5.17 The town centre health checks use the extent of the Experian Goad boundary, which enables direct comparisons to be made with historical figures. The units have been classified in



accordance with Experian's Goad Category Report system. A summary of the town and district centre health check findings is provided in the following pages.

Southport Town Centre

- 5.18 Southport town centre is the principal retail, commercial and administrative centre of the Borough, located within the north of Sefton. The main shopping areas are along 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. Southport also has several indoor malls including Marble Place Shopping Centre, Cambridge Arcade and Wayfarers Arcade, as well as the Southport Market Hall, which is open six days a week. Central 12 Shopping Park (Central 12) is located to the south-east of the traditional shopping core and is anchored by an Asda superstore. By virtue of being outside of the Experian Goad centre boundary for Southport the shopping park is not included within the floorspace and total number of unit figures for the town centre provided in Tables 5.2 and 5.3 above, and WYG conclude that it is located in an out-of-centre location given the distance from the Primary Shopping Area.
- 5.19 The amount of convenience units and floorspace within the Goad boundary is below the national average levels. However, when considered in conjunction with the Asda superstore at Central 12, which is located within the Council's defined town centre boundary, the level of convenience floorspace is more in line with that of the national average. Southport town centre's comparison goods offer is above the national average, both in terms of the number of units and the amount of floorspace, although there are now 22 fewer comparison goods units than were recorded 2010 representing a decline of two percentage points.
- 5.20 Southport's retail service and financial and business services offers are both below the national averages, both in terms of the number of units and the amount of floorspace. However, due to Southport's large size, the majority of services within each sector can still be accessed in the town centre.
- 5.21 The town's role as a tourist destination brings a large number of restaurants, cafes, pubs, takeaways, amusement services and hotels. This is reflected in the leisure service offer,



which is above the national average figure with respect to the proportion of both floorspace and number of units in this sector. The proportion of leisure service units has grown by half a percentage point since 2010, although the proportion of leisure service floorspace has reduced by 0.6 percentage point over the same timeframe. The town centre also offers several additional community facilities, including a library and performance and exhibition space at the Atkinson Centre.

- 5.22 As of May 2015, the town centre had 97 vacant units that comprise 13.1% of the total number of units. This is above the national average of 11.4%³². The vacant units have a combined floorspace of 22,416 sq.m. This represents 15.0% of the town centre's retail floorspace, which is above the national average of 9.2%. However, the position appears to have improved in recent years, with 102 vacant units recorded in 2011, and 110 vacant units in 2010. In addition, the town centre has a large vacant former supermarket at Tulketh Street (approximately 6,700 sq.m gross), which has remained empty for an extended period. If this were removed from the floorspace figures, the proportion of vacant floorspace would be around 10.5%, which is more akin to the national average.
- 5.23 The survey area contains 21 of Goad's top 27 comparison goods retailers and a further four top comparison goods retailers are located at Central 12. No large developments are currently planned within Southport town centre, although an out of centre development proposal for a new food store at Meol's Cop Retail Park is currently under consideration following a 'call-in' by the Secretary of State. Further extant planning permissions exist for retail developments at Meol's Cop Retail Park.
- 5.24 Rental values across the town centre have declined over recent years, which reflect the challenging economic climate. However, we are informed by local property agents that business rates are a major cost, which in some cases are comparable to the level of annual rental costs.
- 5.25 Generally, Southport is considered to have reasonably high overall levels of pedestrian activity. However, in 2014, the town centre experienced a fall in footfall of 3.6%, compared to a fall of 0.9% nationally³³.

³² UK average from the Experian Goad Category Report (April 2015)

³³ Data has been provided by Sefton Borough Council on the number of users using Council operated car parks both in and on the edge of Southport town centre.



- 5.26 The town centre is accessible by car, as it has good free-flowing road connections and the car parking charges are slightly cheaper than those found at similar town centres in the region. Car parking capacity within Southport is generally considered to be capable of meeting demand, however, some of the existing car parks do not provide for particularly convenient access to the main concentrations of shops. Notwithstanding this, the town centre has good train and bus connections and the waiting facilities at bus stops are of a suitably modern standard. Southport has also benefitted from significant Local Sustainability Transport Fund investment and has been awarded 'Cycling Town' status. The town centre has excellent cycle facilities, although further opportunities exist to improve cycle accessibility on roads in and around the town centre. We consider the town centre to have good pedestrian and disabled access and facilities, although there is limited pedestrian connectivity between the main shopping area and Central 12 Shopping Park.
- 5.27 The town centre generally feels safe and its environment is principally of good quality. The centre has quintessential seaside town characteristics, which are combined with high quality areas of public realm and for the most part attractive architecture and retail frontages along Lord Street. However, the town centre's two Conservation Areas (Lord Street and Promenade) have been identified as being at risk. Furthermore, the town centre has several sizable vacant premises, which detract from the appearance of their surroundings. Notwithstanding this, the main shopping areas benefit from healthy levels of pedestrian activity and natural surveillance. In addition, the town centre appears to be well maintained and there are few indications that crime is an issue in the area.

Summary

- 5.28 Southport town centre has strong comparison goods and leisure service offers. Furthermore, although the convenience, retail service and financial and business service offers fall below what would normally be expected when compared to the national averages, the size of the town centre is such that the majority of goods and services within these sectors can still be accessed.
- 5.29 Vacancy rates are above the national average and footfall levels have been in decline in recent years. However, the town centre still receives a large number of visitors and generally feels busy with the vacancy rate recorded as improving in recent years. In addition, the town



centre has good accessibility and its built environment is generally of good quality and feels safe and secure. Overall, we consider the town centre to be vital and viable and it functions well in serving the retail and service needs of the surrounding area and the many tourists who visit each year.

- 5.30 In summary, Southport town centre presents the following strengths and opportunities:
- Large number of tourists and day visitors, who create a vibrant atmosphere and bring large amounts of custom;
 - Strong comparison goods and leisure service offers;
 - Large representation of top national retailers;
 - Attractive architecture within the shopping environment supported by high quality public realm;
 - Large size of town centre enables most services and facilities to be accessed in one place;
 - Excellent sustainable transport facilities, including 'Cycling Town' status;
 - Improving vacancy rate; and
 - Easily accessible by car and competitive car parking charges.
- 5.31 In contrast, the centre presents the following weaknesses and threats:
- Vacancy rate remains above the national average with several particularly poor quality vacant properties;
 - Recent decline in overall footfall across the town centre;
 - Car parks could be better integrated with the rest of the town centre;
 - The town centre's two conservation areas being considered to be at risk; and
 - Lack of connectivity between the main shopping area and Central 12.

Bootle Town Centre

- 5.32 Although located only 6km to the north of Liverpool city centre, Bootle town centre is an important shopping destination within the southern half of Sefton. The town centre is focused around the Strand Shopping Centre, which contains a range of national multiples and independent retailers. Further shopping facilities are located along Stanley Road and Washington Parade.



- 5.33 The total town centre floorspace has increased by 17.4% (7,701 sq.m) since the previous survey was undertaken in July 2011. This is largely because of changes to the Goad boundary, which now includes the Asda store on Strand Road³⁴, and the development of several new retail units.
- 5.34 The town centre has a particularly strong convenience offer, including four major supermarket retailers having stores either within or on the edge of the town centre. However, the comparison goods offer is below the national average and has seen a reduction of 13 units and 1,195 sq.m gross floorspace since 2011.
- 5.35 Bootle town centre's retail service and leisure service offers are also proportionally below the national average floorspace and number of unit levels. Notwithstanding this, Bootle has a strong financial and business service offer, which includes a large number and range of banks and building societies.
- 5.36 The town centre's vacancy rate currently stands at 23.0% of all units, which is 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 above the national average of 9.2%. However, the high vacancy rate is explained by the planned redevelopment of part of the Strand Shopping Centre, which has required a significant number of units to be vacated to enable the works to progress. Once completed, the vacancy rate is expected to improve considerably. Outside of the Strand, the vacancy rates of other parts of the town centre remain low.
- 5.37 Letting agents consider the confidence levels of potential occupants to be relatively weak with confidence in general not improving over the last 12 months. Rental values have declined in response to the challenging wider economic climate.
- 5.38 Pedestrian counts from the Strand Shopping Centre between 2009 and 2014 show that the shopping centre attracts approximately 800,000 visitors a month. However, footfall has decreased year on year over the past five years with a total reduction in monthly average pedestrian counts of 12.0% over that timeframe. Analysis of car park data within the wider town centre shows a similar level of decline in car visitor numbers.

³⁴ Although featured on the Goad plan, the Asda unit is not located within Bootle's Primary Shopping Area.



- 5.39 Bootle town centre can readily be accessed via car, with a range of accessible and generally well maintained car parking options. Based on recent similar health check surveys undertaken by WYG, we consider that parking charges within the town centre are slightly cheaper than other centres which perform a similar role.
- 5.40 In terms of the town centre's accessibility, Bootle New Strand Railway Station is very well located to provide direct access from Liverpool city centre, Southport, Ormskirk and Kirkby. However, it has been identified that journey between the station and the shops would benefit from environmental improvements. The location of the bus station and bus stops provide direct access to the shops and there is good coverage of bus services that link the town centre with the surrounding communities.
- 5.41 The location and number of cycle parking stands are considered to meet demand, although the town centre lacks cycle lanes. With the exception of Washington Parade, the town centre is well suited for pedestrians and disabled visitors, as the pedestrianised areas are largely flat and are covered. Washington Parade, however, suffers from a lack of retail frontage and the overuse of pedestrian guard rails constrains pedestrian movements.
- 5.42 The town centre is generally well overlooked and feels safe and secure. However, we consider Washington Parade to have lower perceptions of safety, as the area has a lack of retail frontage and lower levels of footfall, particularly during evening hours. Furthermore, we consider the Strand Shopping Centre to be somewhat disconnected from the rest of the town centre, being inward facing and does not provide active retail frontages on to either Stanley Road or Washington Parade. The shopping centre offers little environmental quality to the surrounding area. In addition, although suitably maintained, the bus station within the Strand is not a particularly welcoming space for waiting passengers. Internally, the Strand is bright and clean and provides a pleasant shopping environment. Furthermore, the environmental quality of the town centre has benefitted from several modern developments, as well as public realm and landscaping improvements.

Summary

- 5.43 We consider Bootle town centre to have a strong convenience and financial and business service offer, although the retail service and leisure service offers are below average. The



town centre's comparison goods offer is also below the national average proportions but there are still a large number of these types of unit. The vacancy rate is artificially high due to ongoing works at the Strand. Once these works are completed WYG anticipate that vacancy levels will improve to somewhere closer to but still above the national average.

5.44 The town centre has a number of top national multiple retailers but also a wide range of independent retailers. The centre has good accessibility and generally feels safe and secure. However, the external areas around the Strand would benefit from environmental improvements. Footfall within the town centre has declined significantly over recent years. However, the Strand remains a busy shopping environment and it is evident that Bootle continues to perform an important role in catering for the retail and service needs of the southern part of the Borough.

5.45 In summary, Bootle town centre presents the following strengths and opportunities:

- Diverse range of national and independent retail stores;
- Particularly strong convenience and financial and business service offers;
- Train station close to the shops and bus station within the Strand Shopping Centre;
- Significant recent committed public and private sector investment, notably from public realm improvement schemes and recent development proposals, including TJ Hughes returning to the Strand;
- Opportunity presented by the large number of empty units to accommodate new operators that are not currently present within the town centre; and
- Car parking charges are lower than similar competing centres.

5.46 In contrast, the centre presents the following weaknesses and threats:

- Threat from out of centre retail parks, such as Aintree Retail Park, drawing comparison goods trade and operators away from Bootle town centre;
- Competition from Liverpool city centre;
- Declining year on year footfall figures over the past five years;
- Vacancy rate is significantly above the national average and retailers may not return;
- External areas around the Strand possess a weak environmental quality and have a lack of active frontages;



- The bus station has poor environmental quality; and
- Approaches to the town centre from the railway station could be improved.

District Centres

5.47 We now provide below an overview of the role and function of the four district centres.

Crosby

5.48 Crosby district centre is located approximately 7km north of Bootle town centre and neighbours Waterloo district centre which is found 1.5km to the south. Crosby contains 117 retail units, which comprise 18,593 sq.m gross floorspace. The centre is anchored by a Sainsbury's supermarket but Crosby also has particularly strong retail service and leisure service offers and the vacancy rate is well below the national average.

5.49 Crosby's attractive pedestrianised high street and good quality physical environment are its key strengths, which enable the shopping area to feel safe and secure. In addition, the centre has good general accessibility and the car parks and bus facilities offer excellent convenient access to the shops. Overall, we consider Crosby to be a vital and viable centre which serves the surrounding area with a good mix of services and facilities.

Formby

5.50 Formby district centre is located centrally within Sefton Borough. The centre is anchored by a Waitrose supermarket at Three Tuns Lane, although the majority of retailers are located on Chapel Lane. The centre contains 107 retail units comprising 17,733 sq.m gross floorspace. Formby has a particularly large number of national operators for a centre of its size and an extremely low vacancy rate. In terms of the number of units and with the exception of leisure services, each Goad category is outperforming the national average. In addition, there has been a net increase of six leisure service operators since WYG's last survey in 2011. Notwithstanding this, the centre has a disproportionately large number of charity shops (14).

5.51 Although Formby can easily be accessed by car, bike and on foot, we consider its public transport connections to be a weakness. Notwithstanding this, the centre's leafy characteristics and high quality retail frontages provide excellent environmental quality, which in turn help the centre to feel safe and secure. Overall, the centre appears to be a popular



destination that is performing very well. Furthermore, there are healthy levels of pedestrian activity across all parts of the centre.

Maghull

5.52 Maghull district centre is located within the east of the Borough. The centre contains 89 retail units, which have a combined gross floorspace of 13,450 sq.m. The centre is anchored by a Morrisons supermarket (1,905 sq.m gross) and the main shopping facilities are located around the Central Square Shopping Centre and the Red Lion Centre, which are located off Westway. There is a separate cluster of shops to the south of the centre along Liverpool Road South, although the two retailing areas are poorly connected. The comparison goods and leisure service offers are both below the national average level and the vacancy rate is similar to that seen nationally. However, the centre is well represented in terms of its retail service and financial and business service offer, as well as convenience floorspace, which reflects a district centre role.

5.53 The centre is easily accessible by bus and car and the centre benefits from reasonably priced car parking with direct access to the shops. The physical environment, particularly at the Central Square Shopping Centre would benefit from being upgraded as it is showing signs of becoming outdated. Similarly, the car parks that serve this area were found to be poorly maintained, reflecting badly on the centre as a whole. A refurbishment of the centre was formally proposed by a planning application that was granted in February 2011, although the works have not been carried out. Overall, the centre is considered to attract healthy levels of activity and retains an important function in meeting the day-to-day needs of the east of the Borough, but it could benefit from some physical improvements.

Waterloo

5.54 Waterloo district centre is located in the south of the Borough, approximately 3km north of Bootle town centre and 1.3km south of Crosby district centre. The centre contains 210 retail units that comprise 27,839 sq.m gross floorspace. The shopping area is split into two distinct parts, which front onto South Road (southern part) and St John's Road (northern part). South Road is characterised by the presence of a limited number of national retailers and its evening economy uses focused at the western end of the street, whereas St John's Road has many retail service businesses, particularly health and beauty businesses. Collectively, the centre has a varied range of shops and services, albeit relatively few national retailers, and



there is a particularly large leisure service offer. However, the financial and business service offer is significantly below the national average. The centre's vacancy rate of 9.5% is below the national average of 11.3% with considerable improvement in this area recorded since 2011 with 18 fewer vacant units recorded. Despite this improvement, over half of the vacant units identified in 2015 were also vacant in 2011 which indicates a potential issue with long term vacancies and difficult to let properties.

- 5.55 The overall quality of the pedestrian environment is considered to be a weakness, particularly along South Road, where the shopping environment is impacted by the considerable volume of passing vehicular traffic and few areas of public space away from the highway. In addition, shop fronts vary in quality, particularly along South Road, and both areas have a lack of modern premises. The two distinct shopping areas of South Road and St John's Road are not well connected to each other which in turn does not facilitate visitors to conveniently access all of the shops and services within the centre during a single visit. Footfall is greater along South Road than along St John's Road. The centre as a whole feels safe and secure and has good public transport links.

Summary of Health Check Assessments

- 5.56 Overall, we consider all of Sefton's town and district centres to be vital and viable. Southport town centre has strong comparison goods offer and its role as a national tourist destination also brings a strong leisure service offer. However, the town centre's vacancy rate of 13.1% is above the national average, although vacancy rates have improved since 2010.
- 5.57 Bootle town centre is receiving significant investment at The Strand Shopping Centre with the refurbishment of a number of units and T J Hughes opening in the centre. Although Bootle's vacancy rate is above the national average the rate is expected to reduce to a level that is closer to, although still above, the national average once the refurbishment works are complete. Notwithstanding this, some of the areas surrounding The Stand Shopping Centre suffer with poor environmental quality.
- 5.58 The four district centres and the combined totals of Sefton's seven local centres and 94 shopping parades all share similar characteristics, with strong convenience and retail service offers. These centres continue to play a vital role in supporting the day-to-day retail needs of the Borough's population and supplementing the offer of the town centres.



6.0 Population and Expenditure

Introduction

6.01 This section of the Study assesses the current population and available expenditure (for both convenience and comparison goods) within the Study Area.

Study Area Population

6.02 The population within each postal code sector has been sourced from Experian Micromarketer G3 data. Experian’s baseline population data (2013 estimate, which was issued in October 2014) takes into consideration the findings of the 2011 Census release which was then projected forward by Experian using growth rates derived from ONS population projections. Experian’s future population projections are consistent with the housing growth requirement set out in Sefton Council’s emerging Local Plan (submission version, July 2015), which was calculated assuming ONS-based population and housing projections, and therefore represents an appropriate data source for the purposes of modelling future retail needs.

6.03 Tables 6.1 sets out our estimate of future population growth across the Study Area in the 2015 base year and at five-year intervals to 2030 in accordance with the NPPF (i.e. 2015, 2020, 2025 and 2030), using Experian Micromarketer G3 data.

Table 6.1: Population by Survey Zone (2015 to 2030)

Zone	2015	2020	2025	2030
S	86,300	86,800	87,400	87,800
F	23,000	23,100	23,300	23,400
C	45,700	45,900	46,200	46,400
B	75,100	75,600	76,100	76,600
M	37,600	37,800	38,100	38,300
L	123,300	124,500	125,900	127,800
K	37,200	37,400	37,600	37,600
O	46,000	46,200	46,300	46,500
Total	474,400	477,400	481,000	484,500

Source: Experian Micromarketer G3 data (2014 data)
Rounded to the nearest 100



- 6.04 Table 6.1 shows that Experian forecast that the Study Area population will increase from 474,400 persons at 2015 to 484,500 persons at 2030, equating to an increase in population of approximately 10,100 persons, or 2.1%. Within Zones S, F, C, B and M – which broadly accord to the area of the Study Area within Sefton – the forecast population increases from 267,800 at 2015 to 272,600 at 2030. This equates to an estimated population increase of 4,700 persons, or 1.8%, within Sefton over the 15 year study period.
- 6.05 The population projections are substantially higher than those identified in the 2012 Study, when the population of the Study Area was projected to increase by just 2,000 persons between 2016 and 2031. Within Sefton, the population was expected to decrease by 2,700 persons over the 2016 to 2031 period.

Retail Expenditure

- 6.06 In order to calculate the per capita convenience and comparison retail expenditure per person, WYG has again utilised Experian Micromarketer G3 data, which provides detailed information on local consumer expenditure that takes the socio-economic characteristics of the local population into account. Experian is a widely accepted source of expenditure and population data and is regularly used by WYG in calculating retail capacity.
- 6.07 The base year for the Experian expenditure data is 2013. Per capita growth forecasts have been derived from Experian Retail Planner Briefing Note 12.1. Appendix 3 of the Retail Planner Briefing Note identifies the annual growth forecasts for convenience and comparison goods set out in Table 6.2 which inform our assessment.



Table 6.2: Expenditure Growth Rate Forecasts

Year	Convenience	Comparison
2014	-0.5	5.7
2015	0.5	4.4
2016	0.4	3.1
2017	0.5	3.0
2018	0.4	3.0
2019	0.7	3.2
2020	0.7	3.2
2021	0.5	3.0
2022	0.8	3.3
2023	0.8	3.3
2024	0.8	3.3
2025	0.7	3.3
2026	0.7	3.2
2027	0.6	3.2
2028	0.8	3.3
2029	0.6	3.3
2030	0.6	3.3

Source: Appendix 3, Retail Planner Briefing Note 12.1 (October 2014)

- 6.08 The latest growth forecasts suggest that the recovery from the downturn in the economy is well underway, albeit growth in convenience goods expenditure will improve over the medium and long term when compared to the current position. For convenience goods, Experian forecasts +0.5% annual growth at 2015, which is then forecast to increase to +0.8% at 2022. Whilst there is some deviation in the rate forecast thereafter, the rate of annual convenience goods growth forecast to 2030 does not fall below +0.6%.
- 6.09 By contrast, Experian identifies an immediate and relatively strong annual comparison growth rate of +4.4% at 2015. A drop in the rate of growth to +3.1% is anticipated at 2016, with growth rates thereafter to 2030 forecast to be extremely stable, within the range +3.0% to +3.3%.
- 6.10 Growth in expenditure forecast in the longer term (beyond the next ten years) should be treated with caution given the inherent uncertainties in predicting the economy's performance over time. Assessments of this nature should therefore be reviewed on a regular basis in



order to ensure that forecasts over the medium and long term are reflective of any changes to relevant available data.

- 6.11 Experian Retail Planner Briefing Note 12.1 also provides a forecast as to the proportion of expenditure which will be committed through special forms of trading (comprising 'non-store retailing', such as internet sales, TV shopping and so on) over the reporting period. We have 'stripped out' any expenditure which survey respondents indicated was committed via special forms of trading and instead have made an allowance derived from Experian's recommendation.
- 6.12 In considering special forms of trading, it should be noted that many products which are ordered online are actually sourced from a physical store's shelves or stockroom (particularly in the case of convenience goods). Accordingly, expenditure committed in this manner acts to support stores and should be considered 'available' to tangible retail destinations.
- 6.13 Accordingly, in order not to overstate the influence of expenditure committed via special forms of trading, our approach is based on Experian's 'adjusted' figure (provided at Appendix 3 of its Retail Planner Briefing Note) which makes an allowance for internet sales which are sourced from stores. The proportion of expenditure committed through special forms of trading cited below at Table 6.3 is 'stripped out' of the identified expenditure as it is not available to stores within the Study Area.

Table 6.3: Special Forms of Trading Forecasts

Year	Convenience	Comparison
2013	2.3%	11.1%
2015	2.8%	12.5%
2020	4.0%	15.7%
2025	4.9%	15.9%
2030	5.4%	15.6%

Source: Appendix 3, Experian Retail Planner Briefing Note 12.1 (October 2014)

- 6.14 Based on the above growth rates and special forms of trading allowances, it is possible to produce expenditure estimates for each survey zone at 2015, 2020, 2025 and 2030. In doing so, our assessment takes into account both per capita retail expenditure growth and population change.



Convenience Goods Expenditure

6.15 Taking into consideration the above increases in population and per capita expenditure, it is estimated that, at 2015, the resident population of the Study Area generates some £925.4m of convenience goods expenditure³⁵. Available convenience goods expenditure is then forecast to increase to £1,011.5m at 2030, which represents an increase of £86.1m (or 9.3%) between 2015 and 2030. Growth in the short term, up to 2020, is limited to £19.0m.

Table 6.4: Total Available Study Area Expenditure – Convenience Goods (£m)

2015 (£m)	2020 (£m)	2025 (£m)	2030 (£m)	Growth 2015-2020 (£m)	Growth 2015-2025 (£m)	Growth 2015-2030 (£m)
925.4	944.5	977.1	1,011.5	19.0	51.6	86.1

Source: Table 2a, Appendix 6
In 2013 prices

Main Food and 'Top-Up' Shopping

6.16 The proportion of convenience goods expenditure that is committed through main food shopping trips and through 'top-up' shopping trips has been estimated with reference to respondents' answers to Questions 2, 3, 19 and 20 of the household survey. Questions 2 and 19 ask respondents to estimate how much they spent on their last main and top-up food shopping trips, and Questions 3 and 20 ask how often they make such main and top-up food shopping trips, respectively. We analysed responses to these questions to derive an estimate of the split between main and top-up expenditure on a zonal basis.

6.17 Across the whole of the Study Area, we calculate (by adding together our estimates of the monetary split between main and top up shopping expenditure within each zone) that the proportion of convenience goods expenditure directed to respondents' main food shopping destination equates to 77.3% of their overall convenience shopping expenditure. The remaining 22.7% of expenditure (which will typically be spent on regular purchases such as milk, bread and so on) is therefore attributed to the respondents' top-up convenience shopping destination. Our estimate of the split between these two types of expenditure on a zonal basis is provided below at Table 6.5.

³⁵ Expressed in 2013 prices, as is every subsequent monetary value



Table 6.5: Assumed Split of Convenience Goods Expenditure Between Main and Top-Up Shopping

Zone	Main Food	Top Up
S	84.6%	15.4%
F	82.2%	17.8%
C	76.0%	24.0%
B	71.6%	28.4%
M	79.4%	20.6%
L	73.3%	26.7%
K	80.6%	19.4%
O	77.0%	23.0%

Source: Derived from Table 2b, Appendix 6

6.18 By applying these estimates to the identified resident population of the Study Area, convenience goods expenditure at 2015 committed through 'main food' shopping trips is estimated to be £716.5m and through 'top up' shopping trips is estimated to be £208.9m.

Comparison Goods Expenditure

6.19 For comparison goods, Table 6.6 sets out our estimation that the resident population of the Study Area will generate some £1,306.2m of comparison goods expenditure at 2015. Available comparison goods expenditure is then forecast to increase to £2,062.0 at 2030, which represents an increase of £755.7m (or 57.9%) between 2015 and 2030. This is clearly a very significant increase driven primarily by the strong population growth projections across the Study Area and the strong comparison goods expenditure growth forecast over the forthcoming years.

Table 6.6: Total Available Study Area Expenditure – Comparison Goods (£m)

2015 (£m)	2020 (£m)	2025 (£m)	2030 (£m)	Growth 2015-2020 (£m)	Growth 2015-2025 (£m)	Growth 2015-2030 (£m)
1,306.2	1,472.7	1,738.0	2,062.0	166.4	431.8	755.7

Source: Table 9, Appendix 7
In 2013 prices

6.20 We note that the forecast growth in comparison goods spending in the short and medium term periods up to 2020 and 2025 is substantially higher than estimated in the 2012 Study. Growth between 2015 and 2025 is estimated at £431.8m, whereas in the 2012 Study the level of expenditure growth between 2016 and 2026 was estimated at £298.9m (2013



prices). This increase in comparison goods expenditure growth reflects the substantially higher population growth projections for the Study Area as well as modest increases in the forecast per capita comparison goods expenditure growth since the 2012 Study due to improving consumer confidence since the previous retail study was completed in 2012.

- 6.21 Expenditure growth over the longer term 2015 to 2030 period is comparable to the 2016 to 2031 estimate in the 2012 Study, of £718.9m (in 2013 prices), as the increased growth in population is offset by more modest longer term expenditure growth rates and the increasing expectations as to the proportion of comparison goods expenditure that will be committed through special forms of trading (most notable, internet shopping).
- 6.22 For the purposes of this Study, comparison goods expenditure has been divided into eight sub-categories: 'Electrical', 'DIY & Gardening' and 'Furniture' (these three categories collectively being referred to as bulky goods) and, 'Clothing & Footwear', 'Books' CDs and DVDs, 'Small Household Goods', 'Toys, Games, Bicycles and Recreational Goods' and 'Health and Beauty/Chemist Goods' (collectively referred to as non-bulky goods). The proportion of expenditure directed to each sub-category is estimated by Experian on a zonal basis.
- 6.23 In considering the above, it should be noted that if an excess of expenditure manifests itself within the Study Area, this does not necessarily translate directly into a requirement for additional floorspace. In assessing quantitative need, it is also necessary to take account of:
- Existing development proposals;
 - Expected changes in shopping patterns; and
 - The future efficiency of retail floorspace.

7.0 Retail Capacity in Sefton Borough

- 7.01 We have examined the need for new convenience and comparison goods floorspace over the five year reporting periods to 2030 (i.e. at 2015, 2020, 2025 and 2030). At the outset, it is important to note that an assessment in the long term should be viewed with caution, due to the obvious difficulties inherent in predicting the performance of the economy and shopping habits over time. In any event, any identified capacity should not necessarily be viewed as justification of new retail floorspace outside of centres as this could prejudice the implementation of any emerging town centre redevelopment strategies and the development of more central sites which may be currently available or which could become available over time.
- 7.02 A complete series of quantitative capacity tables are provided at Appendix 6 (Convenience Goods) and 7 (Comparison Goods) to provide further detail in terms of the step-by-step application of our quantitative assessment methodology.

Capacity Formula

- 7.03 For all types of capacity assessment, the conceptual approach is identical, although the data sources and assumptions may differ. The key relationship is Expenditure (£m) (allowing for population change and retail growth) *less* Turnover (£m) (allowing for improved 'productivity') *equals* Surplus or Deficit (£m).
- 7.04 **Expenditure (£m)** – The expenditure element of the above equation is calculated by taking the population within the defined catchment and then multiplying this figure by the average annual expenditure levels for various forms of retail spending per annum. The expenditure is estimated with reference to a number of factors, namely:
- Growth in population;
 - Growth in expenditure per person per annum; and
 - Special Forms of Trading (e.g. the internet, catalogue shopping and so on).
- 7.05 **Turnover (£m)** – The turnover figure relates to the annual turnover generated by existing retail facilities within the Study Area. The turnover of existing facilities is calculated using



Mintel Retail Rankings and Verdict UK Grocery Retailers reports – independent analysis which lists the sales densities for all major multiple retailers.

- 7.06 **Surplus / Deficit (£m)** – This represents the difference between the expenditure and turnover figures outlined above. A surplus figure represents an effective under provision of retail facilities within the Study Area (which, all things being equal, would suggest that additional floorspace could be supported), whereas a deficit would suggest a quantitative overprovision of retail facilities.
- 7.07 Although a surplus figure is presented in monetary terms, it is possible to convert this figure to provide an indication of the quantum of floorspace which may be required. The level of floorspace will vary dependent on the type of retailer proposed and the type of goods traded. For example, in the case of comparison goods, non-bulky goods retailers tend to achieve higher sales densities than bulky goods retailers. However, within the bulky goods sector itself there is significant variation, with electrical retailers tending to have a much higher sales density than those selling DIY or furniture goods.

Capacity for Future Convenience Goods

North Sefton

Trading Performance of Existing Convenience Provision

- 7.08 In order to ascertain the likely need for additional convenience goods floorspace in Sefton, it is first necessary to consider the performance of the current provision. Tables 7.1 and 7.4 below assess the individual performance of each of the main convenience goods facilities in North and South Sefton, respectively, by comparing the survey-derived turnover of each food retail destination to its 'benchmark' turnover. The 'benchmark' turnover indicates the level of turnover that the store would generally be expected to attract, based on company average trading levels. A judgement can then be made on the trading performance of existing facilities based by comparing the survey-derived turnover with the expected 'benchmark' turnover (based on nationally published trading information from Mintel and Verdict) of existing provision.



- 7.09 The 'benchmark' turnover differs for each operator based on its average turnover per square metre throughout the country. Although robust up-to-date information is available in terms of the convenience goods floorspace provided by large foodstores, it can be more difficult to quantify the extent of local convenience provision as there is no single comprehensive database to rely upon. Where we have been unable to verify the exact quantum of floorspace provided by existing smaller-scale convenience stores, we have assumed that stores are trading 'at equilibrium' (i.e. the survey-derived turnover equates to the expected level of turnover).
- 7.10 For each convenience goods retail destination, consideration has been given as to whether any turnover is likely to be derived as 'inflow' from outside the Study Area. Given the strong tourist economy of Sefton, we have assumed 10% inflow for stores in and the edge of Southport town centre, and 5% inflow for stores in Formby and Crosby district centres. For all other stores within Sefton, recognising that the Study Area is drawn over a wide geographical area and the stores' relatively central location within it, it has been assumed that all of the store's turnover will derive from within the Study Area. Based on the above assumptions for inflow, we have therefore made an allowance for an additional £12.6m of spending on convenience goods in Sefton to be generated by residents outside of the Study Area.
- 7.11 The findings of Sefton STEAM (Scarborough Tourism Economic Activity Monitor) trend report for 2009-2014 were provided by Sefton Council. The STEAM report analyses the economic impact of both visitor spending in Sefton (including both staying visitors and day visitors), which includes an estimate of the retail spending of visitors to Sefton. The STEAM report identifies that in 2014, visitors to Sefton spent a total of £146.7m on shopping in Sefton. The STEAM data does not break down the shopping spend into comparison or convenience goods items. Assuming that 20% of the total visitor spend on shopping was spent on convenience goods indicate that an additional £29.3m of convenience spending in Sefton is generated by inflow. Whilst it is recognised that some of this visitor spending by residents outside of Sefton but within the Study Area might already be accounted for as part of the household survey, the household survey focuses on residents usual shopping patterns and any potential double counting is likely to be minimal. We also note that over 92% of visits to Sefton are by day visitors rather than more prolonged stays. We therefore consider that our assumptions for



inflow, which amounts to less than half the level of visitor convenience spending suggested by the STEAM report, represents a conservative estimate of visitor spending in Sefton.

7.12 Our assessment is based upon a 'goods based' approach, which disaggregates expenditure by category type, and it is important to recognise that major foodstore operators generally sell an element of non-food goods such as books, compact discs, clothing and household goods. To account for this, the typical ratio between convenience/comparison goods provision for each operator³⁶ has been applied to the estimated net floorspace of each foodstore³⁷. This provides an indication of the likely sales area dedicated to the sale of convenience goods at each store.

7.13 Whilst survey results are commonly accepted as a means by which to identify existing shopping patterns, their findings should be treated with a 'note of caution' as they can have a bias towards national multiple retailers and, as a consequence, may understate the role of smaller stores and independent retailers. However, we note that there is a substantial level of convenience goods floorspace identified at the local parade level across the Borough that is not get identified through the survey when establishing either main or top up food shopping patterns. However, from review of the floorspace it is often found that these facilities are very localised facilities, with a high level of small scaled CTN, off licences, bakers or butchers, such provision does not serve either a main food or top-up food shop function and therefore it is considered that such facilities should not be materially considered within this more strategic spatial capacity exercise but these cater for micro level needs that are very difficult to identify and quantify.

³⁶ Derived from Verdict UK Food & Grocery 2014 Company Briefing Reports. Where Verdict data is not available or is considered not to appropriately reflect how a store trades in practice, we have applied professional judgement in the manner set out in the notes to Table 5 of Appendix 8

³⁷ Net sales areas have been sourced from Storepoint database of food retailers. Where such data is not available, we have applied professional judgement in the manner set out in the notes to Table 5 of Appendix 8

Table 7.1: Trading Performance of Existing Foodstores in North Sefton (2015)

Store	Net Conv F'space (sq. m)	T'over per sq. m (£)	Benchmark Turnover (£m)	Survey Derived Turnover (£m)	Survey Estimate + Inflow (£m)
Zone S					
Southport Town Centre (PSA)					
Iceland, King Street, Southport	518	7,615	3.9	0.2	0.2
Local shops, Southport	2,950	2,500	7.4	2.9	3.1
Marks & Spencer, Chapel Street, Southport	642	11,578	7.4	2.2	2.4
Morrisons, Winter Gardens, Southport	1,987	13,388	26.6	25.7	28.3
Sainsbury's, Lord Street, Southport	1,174	12,684	14.9	16.3	17.9
Tesco Express, Eastbank Street, Southport	224	12,099	2.7	0.3	0.3
Edge-of-Centre					
Asda, Central 12 Shopping Park, Southport ³⁸	2,533	13,901	35.2	32.5	35.8
Farmfoods, Lord Street, Southport	279	7,026	2.0	1.2	1.4
Lidl, Virginia Street, Southport	743	3,522	2.6	10.0	11.0
Sub Total (Southport)			102.7	91.4	100.5
Ainsdale Local Centre					
Co-operative Food, Station Road, Ainsdale	722	8,146	5.9	5.3	5.3
Local shops, Ainsdale	599	2,500	1.5	1.5	1.5
Tesco Express, Station Road, Ainsdale	223	12,099	2.7	0.5	0.5
Sub Total (Ainsdale)			10.1	7.2	7.2
Birkdale Local Centre					
Local shops, Birkdale	851	2,500	2.1	0.9	0.9
Sub Total (Birkdale)			2.1	0.9	0.9
Churchtown Local Centre					
Local Shops, Churchtown	664	2,500	1.7	0.4	0.4
Tesco Express, Preston New Road, Churchtown	174	12,099	2.1	0.2	0.2
Sub Total (Churchtown)			3.8	0.6	0.6
Shakespeare Street Local Centre					
Co-operative Food, St James Place, Southport	134	8,146	1.1	0.0	0.0
Local shops, Shakespeare Street	0	2,500	0.0	0.0	0.0
Sub Total (Shakespeare Street)			1.1	0.0	0.0
Local Parades					
Tesco Express, Liverpool Road, Birkdale	212	12,099	2.6	2.6	2.6
Spar, Bispham Rd, Southport	266	7,135	1.9	0.3	0.3
Tesco Express, Albert Street, Hesketh	210	12,099	2.5	0.2	0.2
Other, Local Parades	-	-	3.0	3.0	3.0
Sub Total (Local Parades)			10.0	6.0	6.0

³⁸ Our recommendation to the Council is that the Asda store should be defined as out-of-centre rather than edge-of-centre.



Out-of-Centre					
Aldi, Meols Cop, Southport	1,157	11,748	13.6	28.1	28.1
Co-operative Food, Fylde Road, Southport	925	8,146	7.5	0.9	0.9
Co-operative Food, Marshside Road, Southport	170	8,146	1.4	3.8	3.8
Tesco Extra, Town Lane, Meols Cop, Southport	4,108	12,099	49.7	50.1	50.1
Other, Out-of-Centre	-	-	0.6	0.6	0.6
Sub Total (Out-of-Centre)			72.8	83.5	83.5
Sub Total (Zone S)			202.6	189.6	198.8
Zone F					
Formby District Centre (PSA)					
Iceland, Chapel Lane, Formby	326	7,615	2.5	1.8	1.9
Local shops, Formby	501	2,500	1.3	1.9	2.0
Marks & Spencer (Simply Food), Halsall Lane, Formby	602	11,578	7.0	2.1	2.2
Morrisons Local, Chapel Lane, Formby	368	13,388	4.9	0.7	0.7
Waitrose, Three Tuns Lane, Formby	1,727	13,080	22.6	27.7	29.0
Sub Total (Formby)			38.2	34.2	35.9
Local Parades					
Spar, Harington Road, Formby	104	7,135	0.7	1.3	1.3
Other, Local Parades			0.3	0.3	0.3
Sub Total (Local Parades)			1.1	1.7	1.7
Out-of-Centre					
Tesco Superstore, Altcar Road, Formby	2,348	12,099	28.4	29.9	29.9
Sub Total (Out-of-Centre)			28.4	29.9	29.9
Sub Total (Zone F)			67.7	65.8	67.5
Total (North Sefton)			270.3	255.4	266.2

Source: Table 5, Appendix 6

7.14 Table 7.1 shows that across North Sefton, the expected benchmark turnover of existing convenience goods shopping provision is £270.3m, which compares to a survey-derived turnover of £266.2m (including 10% allowance for inflow for facilities in Southport). This suggests that, collectively, convenience goods floorspace in North Sefton is trading broadly in line with expectations (albeit £4.1m, or 2%, below the benchmark level). However, this position represents a considerable decline in performance since 2011 when convenience floorspace across North Sefton was collectively found to be trading at around 17% above benchmark.

7.15 There are marked differences in the trading performances of individual stores and centres across North Sefton. Noting the caveat provided at paragraph 7.13, Table 7.1 indicates that



two stores in Southport town centre – Sainsbury’s on Lord Street and the edge-of-centre Lidl at Virginia Street – are performing particularly strongly. The Sainsbury’s store achieves a convenience turnover of £17.9m, 20% (£3.0m) above its ‘benchmark’ turnover of £14.9m and the Lidl achieves a convenience turnover of £11.0m, 322% (£8.4m) above its ‘benchmark’ of £2.6m. The strong trading position of these stores remains similar to that identified from the findings of the 2011 household survey, when both of these stores were also found to be trading particularly strongly. The Morrisons store at Winter Gardens in the town centre is also performing well and achieves a convenience turnover 6% (£1.7m) higher than its company average benchmark. The edge-of-centre Asda store at Central 12 Shopping Park is performing broadly in line with expectations.

7.16 However, four of the 8 main convenience retail facilities in and on the edge of Southport town centre (Iceland, the Marks & Spencer foodhall and Tesco Express in Southport town centre, and the edge-of-centre Farmfoods store in Southport), along with the local convenience shops in the town centre are trading below their respective benchmark levels.

7.17 Collectively, the convenience retail provision in Southport town centre is under-trading by £10.7m, or 17%, and edge-of-centre provision is over-trading by £8.4m. Overall, convenience retail provision in and on the edge-of Southport town centre achieves a combined survey-derived turnover of £100.5m including an allowance for inflow, which is comparable to the benchmark turnover level of £102.7m. Nevertheless, the trading performance of the stores in and on the edge-of Southport has declined substantially since 2011, when the collective survey-derived turnover of these facilities was found to 12% above the corresponding benchmark level.

7.18 Outside of Southport town centre, Aldi at Meols Cop and the Co-op at Marshside Road are performing particularly strongly. Aldi achieves a convenience turnover of £28.1m, 107% (£14.5m) above its benchmark turnover, and the Co-op achieves a turnover some £2.4m (175%) above its benchmark. The survey findings suggest that the Tesco Extra at Meols Cop is trading (£50.1m) in accordance with its benchmark turnover level, although this position represents a slight decline in performance since 2011 when the store was found to be trading at around 18% above benchmark. Our findings in relation to the Tesco store are broadly



consistent with information provided by Tesco³⁹, which confirms that the store at Meols Cop typically achieves a turnover in the range £51.2m to £54.1m. The survey findings suggest that the out-of-centre Co-op store at Fylde Road in Southport is trading at £6.6m or 88% below its benchmark level, although we note that the survey findings may have understated the role of this relatively small store for the reasons set out in paragraph 7.13 above.

7.19 In Formby District Centre, the survey results indicate that the Marks & Spencer Simply Food store on Hassall Lane, Morrisons Local on Chapel Lane, and Iceland on Chapel Lane are all under-performing compared to national averages (by £4.8m or 68%, £4.2m or 85%, and £0.5m or 22%, respectively). The Waitrose store on Three Tuns Lane and the local convenience shops in the centre are, however, trading strongly, achieving survey-derived turnovers £6.4m (29%) and £0.7m (58%) above their benchmark levels, respectively. Overall, the trading position of convenience provision in Formby is broadly in line with expectations at only slightly (£2.3m, or 6%) below its benchmark. However, the performance of the main foodstores in Formby has declined since 2011 when convenience shopping facilities in the centre were collectively found to be trading at around 12% above the benchmark level. Outside of Formby town centre, the Tesco store at Altcar Road in Formby is trading in accordance with its company average benchmark.

7.20 It should be noted that, whilst we have no doubt that the Aldi and Lidl stores in North Sefton are performing very strongly indeed, the estimation of stores' turnover is subject to a number of assumptions. For example, in apportioning main and top up convenience goods expenditure using the household survey, it is assumed that each person within a zone spends the zonal per capita average amount on such items. However, in actuality, it is likely that the typical discount foodstore customer spends a lesser amount than the typical 'main four' foodstore shopper. Accordingly, there is the possibility that the turnover of certain discount foodstores may have been overestimated and that the turnover of certain 'main four' foodstores may have been underestimated. However, across the Study Area as a whole, the methodology acts to balance out any such discrepancies.

Quantitative Need for Additional Convenience Goods Floorspace in North Sefton

7.21 Table 7.2 appraises the future capacity for additional convenience goods retail floorspace in North Sefton, taking account of the current convenience goods trading position compared

³⁹ In its letter to DPP Planning dated to 10 September 2015 submitted in relation to the Call-in Inquiry into the proposed construction of a Sainsbury's foodstore at Meols Cop Retail Park (Appeal reference AP/2015/00035).



against the 'benchmark' (or anticipated) turnover of existing convenience goods floorspace. Accordingly, Table 7.2 sets out the benchmark turnover of existing convenience retail facilities in North Sefton in the 2015 base year and projects this forward to 2030 assuming that benchmark turnover of existing floorspace will increase through improvements in floorspace efficiency at the rates set out in Experian Retail Planner Briefing Note 12.1.

7.22 The convenience goods expenditure available to support additional convenience goods retail facilities in North Sefton in the 2015 base year and each of the forecast years includes an allowance for 10% inflow for stores in and the edge of Southport town centre (equating to £9.1m inflow at 2015) and 5% inflow for stores in Formby district centre (equating to £1.7m inflow at 2015).

7.23 The £255.4m of convenience goods expenditure claimed by destinations within North Sefton at 2015 equates to a market share of 27.6% of all convenience goods expenditure generated by residents of the Study Area. It is assumed that the current market share of facilities in North Sefton of 27.6% is maintained over the forecast period.

Table 7.2: Estimated Capacity for Convenience Goods Facilities in North Sefton

Year	Benchmark Turnover - £m ¹	Derived Turnover (plus inflow) - £m ²	Surplus Expenditure - £m ²
2015	270.3	266.2	-4.1
2020	267.1	271.4	4.3
2025	267.6	280.4	12.8
2030	268.9	289.9	21.0

¹ Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 12.1 Addendum (Oct 2014)

² Assumes constant market share claimed by North Sefton facilities at 27.6% from Study Area. Includes an allowance for 10% inflow for stores in and the edge of Southport town centre (equating to £9.1m inflow at 2015) and 5% inflow for stores in Formby district centre.
At 2013 prices

7.24 Table 7.2 indicates that the convenience goods expenditure deficit of -4.1m in 2015, which corresponds to the current level of under-trading in North Sefton. By 2020, the convenience goods expenditure surplus in North Sefton is positive at £4.3m, and increases to 12.8m in the period to 2025, and £21.0m in the longer term period to 2030.

7.25 There are no commitments in or in close proximity to North Sefton that will impact on the identified expenditure capacity for new convenience goods floorspace in this area of Sefton. As shown in Table 7.3, the residual expenditure available to support new convenience goods



floorspace in North Sefton is therefore the same as the identified surplus expenditure. Table 7.3 then converts the residual expenditure into a floorspace requirement for North Sefton and shows that the small positive residual expenditure available to support additional food retail provision in the period up to 2025 would be sufficient to support a small supermarket. The residual expenditure arising in the period up to 2030 remains relatively modest, and would be sufficient to support a medium sized supermarket with around 1,600 sq.m net convenience floorspace, such as an Aldi, Lidl or Tesco Metro format store.

7.26 The identified needs for additional convenience goods floorspace in North Sefton are considerably lower than those identified in the 2012 update, which identified a residual capacity for between 4,700 sq.m and 11,800 sq.m net convenience floorspace in North Sefton arising in the period 2011 to 2026, rising to between 5,100 sq.m and 12,800 sq.m net in the period up to 2031. A number of new convenience retail stores have opened in North Sefton since the 2012 Study was completed (a Morrisons Local at Chapel Lane in Formby and a 466 sq.m extension to the Aldi store at the Meols Cop Centre in Southport), which were not planned at the time of the 2012 assessment. This new retail floorspace will have impacted on the capacity for future convenience floorspace in North Sefton compared to the position at 2012. Nevertheless, these developments are relatively small in scale and the primary reason for the fall in identified capacity for new convenience floorspace is the more modest performance of existing stores in North Sefton.

Table 7.3: Quantitative Need for Additional Convenience Goods Floorspace in North Sefton

Year	Convenience Goods				
	£m			Floorspace Requirement (Net)	
	Surplus	Commitments	Residual	Min ^{1*}	Max ^{2*}
2015	-4.1	0.00	-4.1	-300	-800
2020	4.3	0.00	4.3	300	900
2025	12.8	0.00	12.8	1,000	2,600
2030	21.0	0.00	21.0	1,600	4,200

¹ Average sales density assumed to be £13,018 per sq.m (based on the average sales density of the leading four supermarkets as identified by Verdict 2014)

² Average sales density assumed to be £5,000 per sq.m
Rounded to the nearest 100 sq.m
At 2013 prices

South Sefton

Trading Performance of Existing Convenience Provision

7.27 Table 7.4 below assesses the individual performance of each of the main convenience goods facilities in South Sefton by comparing the survey-derived turnover of each food retail destination with the 'benchmark' turnover for each store calculated based on company average trading levels.

Table 7.4: Trading Performance of Existing Foodstores in South Sefton

Store	Net Conv F'space (sq. m)	T'over per sq. m (£)	Benchmark Turnover (£m)	Survey Derived Turnover (£m)	Survey Estimate + inflow (£m)
Zone C					
Crosby District Centre (PSA)					
Farmfoods, Liverpool Road, Crosby	226	7,026	1.6	1.5	1.6
Sainsbury's, Liverpool Road, Crosby	1,304	12,684	16.5	26.1	27.4
Local Shops, Crosby	582	2,500	1.5	4.0	4.2
Tesco Express, Coronation Road, Crosby	262	12,099	3.2	3.0	3.2
Sub Total			22.8	34.6	36.3
Waterloo District Centre (PSA)					
Co-operative Food, Brighton Road, Waterloo	922	8,146	7.5	1.9	1.9
Iceland, South Road, Waterloo	381	7,615	2.9	3.2	3.2
Local shops, Waterloo	1,178	2,500	2.9	1.2	1.2
Edge-of-Centre					
Tesco Express, Crosby Road North, Liverpool	212	12,099	2.6	1.0	1.0
Sub Total			15.9	7.2	7.2
Local Parades					
Co-operative Food, College Road, Crosby	325	8,146	2.6	1.7	1.7
Aldi, Moor Lane, Thornton	900	11,748	10.6	27.6	27.6
Other, Local Parades			0.2	0.2	0.2
Sub Total (Local Parades)			13.4	29.4	29.4
Out of Centre					
Tesco Express, Edge Lane, Thornton	219	12,099	2.7	0.8	0.8
Other, Out-of-Centre			0.3	0.3	0.3
Sub Total (Out-of-Centre)			3.0	1.1	1.1
Sub Total (Zone C)			55.1	72.4	74.1
Zone B					
Bootle Town Centre (PSA)					
Heron Foods, Strand Shopping Centre, Bootle	219	6,557	1.4	1.2	1.2
Iceland, Strand Shopping Centre, Bootle	531	7,615	4.0	4.5	4.5

Marks & Spencer, Stanley Road, Bootle	864	11,578	10.0	3.3	3.3
Local shops, Bootle	1,522	2,500	3.8	12.9	12.9
Edge-of-Centre					
Aldi, Washington Parade, Bootle	900	11,748	10.6	19.7	19.7
Asda, Strand Road, Bootle	2,851	13,901	39.6	45.9	45.9
Lidl, Marsh Lane, Bootle	850	3,522	3.0	6.8	6.8
Sub Total			72.5	94.4	94.4
Netherton Local Centre					
Iceland, Marian Square, Netherton	330	7,615	2.5	2.5	2.5
Local shops, Netherton	1,038	2,500	2.6	2.1	2.1
Subtotal			5.1	4.6	4.6
Seaforth Local Centre					
Local shops, Seaforth	187	2,500	0.5	0.2	0.2
Edge-of-Centre					
Lidl, Wellington Road, Seaforth	789	3,522	2.8	6.4	6.4
Subtotal			3.2	6.6	6.6
Local Parades					
Other, Local Parades			1.0	1.0	1.0
Subtotal (Local Parades)			1.0	1.0	1.0
Out-of-Centre					
Aldi, Park Lane West, Netherton	603	11,748	7.1	6.0	6.0
Asda, Orrell Lane, Bootle	686	13,901	9.5	5.0	5.0
Tesco Superstore, Hawthorne Road, Litherland	2,803	12,099	33.9	61.2	61.2
Other, Out-of-Centre	-	-	2.4	2.4	2.4
Sub Total (Out-of-Centre)			52.9	74.6	74.6
Sub Total (Zone B)			134.8	181.2	181.2
Zone M					
Maghull District Centre (PSA)					
Local shops, Maghull	655	2,500	1.6	3.0	3.0
Morrisons, Stafford Moreton Way, Maghull	1,003	13,388	13.4	28.0	28.0
Sub Total			15.1	31.0	31.0
Old Roan Local Centre					
Local shops, Old Roan	52	2,500	0.1	0.0	0.0
Tesco Express, Molyneux Way, Old Roan	232	12,099	2.8	1.1	1.1
Sub Total			2.9	1.1	1.1
Local Parades					
Iceland, Northway, Maghull	374	7,615	2.8	0.2	0.2
Lidl, Northway, Maghull	743	3,522	2.6	9.3	9.3
Co-operative Food, Deyes Lane, Maghull	227	8,146	1.8	3.1	3.1
Other, Local Parades			0.1	0.1	0.1
Sub Total (Local Parades)			7.4	12.7	12.7



Out-of-Centre					
Other, Out-of-Centre			1.1	1.1	1.1
Subtotal			1.1	1.1	1.1
Sub Total (Zone M)			26.5	45.9	45.9
Zone L					
Out-of-Centre					
Asda, Ormskirk Road, Aintree	4,574	13,901	63.6	71.5	71.5
Marks & Spencer, Aintree Retail Park	679	11,578	7.9	4.9	4.9
Subtotal			71.4	76.4	76.4
Sub Total (Zone L)			71.4	76.4	76.4
Total (South Sefton)	-	-	287.8	375.8	377.6

Source: Table 5, Appendix 6

7.28 Table 7.4 indicates that, across South Sefton, the expected benchmark turnover of existing convenience goods shopping provision is £287.8m, which compares to a survey-derived turnover (including inflow) of £377.6m. This suggests that, cumulatively, convenience goods floorspace in South Sefton is 'over-trading' by some £89.8m. The majority of this overtrading (£46.5m, or 52%) occurs in Zone B (Bootle), with £19.4m or 22% in Zone M (Maghull), £19.0m or 21% in Zone C (Crosby) and the remaining £4.9m or 6% in Zone L (Liverpool). From this analysis, the results suggest there is a current undersupply of convenience goods floorspace within Sefton in Zones B, M and C.

7.29 However, it must be noted that the performance of individual stores and destinations across within each of these zones is varied. Many stores are performing particularly strongly, most notably:

- Sainsbury's at Liverpool Road in Crosby District Centre, which achieves a survey based turnover including inflow of £10.8m, or 65%, higher than its benchmark;
- Aldi at Moor Lane in Thornton (in Local Parade 90, over-trading by £17.0m, or 161% above its benchmark turnover);
- Aldi at Washington Parade at the edge of Bootle town centre (over-trading by £9.2m, or 87%);
- Lidl at Marsh Lane at the edge of Bootle town centre (3.8m or 126%);
- Lidl at Wellington Road at the edge of Seaforth Local Centre (£3.6m or 131%);
- The out of centre Tesco at Hawthorne Road in Litherland (£27.2m or 80%);
- Morrisons at Stafford Moreton Way in Magull District Centre (£14.6m or 109%); and
- Lidl at Northway in Magull (in Local Parade 59, £6.7m or 255%).



- 7.30 A small number of stores are performing particularly poorly, including the Co-operative store at Brighton Road in Waterloo District Centre, which is under-trading by £5.6m, or 75% below its benchmark level, the Marks & Spencer store at Stanley Road in Bootle Town Centre (under-trading by £6.7m or 67%) and out-of-centre Asda at Orrell Lane in Bootle (under-trading by £4.5m or 47%) and Marks & Spencer at Aintree Retail Park (under-trading by £3.0m or 38%) .
- 7.31 Collectively, convenience retail floorspace in Crosby District Centre (Zone C), Bootle Town Centre (Zone B) and Maghull District Centre (Zone M) is performing well, achieving survey based turnovers 59%, 30% and 106% above their corresponding benchmarks, respectively. However, convenience floorspace in Waterloo District Centre (Zone C) is collectively under-trading by 55%.

Quantitative Need for Additional Convenience Goods Floorspace in South Sefton

- 7.32 Similarly to North Sefton above, Table 7.5 appraises the future capacity for additional convenience goods retail floorspace in South Sefton taking account of the current convenience goods trading position compared against the 'benchmark' (or anticipated) turnover of existing convenience goods floorspace. Table 7.5 sets out the benchmark turnover of existing convenience retail facilities in South Sefton in the 2015 base year and projects this forward to each of the forecast years assuming that the benchmark turnover of existing floorspace will increase through improvements in floorspace efficiency at the rates set out in Experian Retail Planner Briefing Note 12.1.
- 7.33 The convenience goods expenditure available to support additional convenience goods retail facilities in South Sefton in the 2015 base year and each of the forecast years includes an allowance for 5% inflow for stores in Crosby district centre. The £375.8m of convenience goods expenditure claimed by destinations within South Sefton at 2015 equates to a market share of 40.6% of all convenience goods expenditure generated by residents of the Study Area. It is assumed that the current market share of facilities in South Sefton of 40.6% is maintained over the forecast period. In Table 7.6 we then consider the effect of any extant planning commitments will have in addressing any identified convenience goods shopping needs.



Table 7.5: Estimated Capacity for Convenience Goods Facilities in South Sefton

Year	Benchmark Turnover - £m ¹	Derived Turnover (inc. Inflow) - £m ²	Surplus Expenditure - £m ²
2015	287.8	377.6	89.8
2020	284.3	385.3	100.9
2025	284.9	398.5	113.6
2030	286.3	412.5	126.2

¹ Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 12.1 Addendum (Oct 2014)

² Assumes constant market share of 40.6% within Study Area. Includes an allowance for 5% inflow for stores in Crosby district centre.

Rounded to the nearest 100 sq.m
At 2013 prices

7.34 Table 7.5 indicates that the convenience goods expenditure surplus in South Sefton at 2015 is £89.8m, which corresponds to the current level of over-trading in South Sefton. By 2020, after increases in population and expenditure are considered against changes in floorspace productivity⁴⁰, we estimate that the surplus convenience goods expenditure will be £100.9m, rising thereafter to £113.6m by 2025 and £126.2m by 2030.

7.35 Whilst there are no commitments in Sefton for new convenience goods floorspace, a number of committed schemes are planned outside of the Borough that are expected to impact on the identified expenditure capacity for new convenience goods floorspace in South Sefton. As set out at Table 7.6, we estimate that the extant retail planning permissions⁴¹ for new foodstore in Kirkby would have a turnover of £63.3m, if operational in the 2015 base year, of which 25% is expected to be drawn from South Sefton. This estimate allows for much of the convenience expenditure of residents in Kirkby that is currently spent in stores in South Sefton to be 'clawed back' by Kirkby following the provision of a main food shopping destination in the town, which is currently lacking in the Kirkby. We estimate that the commitments for new foodstores in Fazakerley and Everton would have turnovers of £45.9m and £43.8m, respectively, if operational in the 2015 base year, of which 10% is expected to be drawn from South Sefton, reflecting the distance of these stores from South Sefton.

7.36 We estimate that the commitment for a new Aldi store in Walton would have a convenience goods turnover of £11.8 at 2015 and the proposed new Lidl store in Fazakerley would have a

⁴⁰ Account has been made for the turnover efficiency of existing convenience goods floorspace to change (on the basis that operators have historically been able to make their existing floorspace more productive over time) in accordance with the projections set out in Table 4a of Experian Retail Planner Briefing Note 12.1 Addendum (October 2014), these being -0.3% at 2015, -0.4% at 2016, -0.2% per annum between 2017 and 2021, and +0.1% between 2022 and 2030.

⁴¹ As reported by Knowsley Council to WYG at September 2015

turnover of £2.9m. We expect that 30% of the turnover of the Aldi in Walton and 15% of the Lidl in Fazakerley, which are both located in close proximity and easily accessible from South Sefton, would be drawn from South Sefton. Full details of the assumptions made in estimating the turnover of commitments are provided in the notes which accompany Table 6 of Appendix 6.

Table 7.6: Extant Convenience Commitments in the Study Area

Zone	Planning Application Reference	Proposal	Net Conv Sales (sq.m)	Sales Density (£ per sq.m)	Turnover at 2015 (£m)	Turnover from South Sefton at 2015 (£m)	Status
K	10/00505/OUT	Foodstore, Cherryfield Drive, Kirkby	4,750	13,324	63.3	15.8	Outline – Tesco pulled out, Council progressing scheme
L	130/0656	Foodstore and petrol filling station shop, East Lancs Road/Stonebridge Lane, Fazakerley	3528	13018	45.9	4.6	Approved subject to S106
L	13F/1178	Foodstore and petrol filling station shop, Great Homer Street, Everton (Project Jennifer)	3,455	12,684	43.8	4.4	Work commenced
L	15F/1129	Aldi foodstore, former Walton Hospital, Rice Lane, Liverpool	1,003	11,748	11.8	3.5	Approved subject to S106
L	14F/1802	Lidl foodstore, Longmoor Lane, Fazakerley	814	3,522	2.9	0.4	Full planning permission
Total					169.9	28.8	

Source: Table 6 of Appendix 6
2013 Prices

7.37 Table 7.7 below sets out the residual convenience expenditure capacity in South Sefton, taking into account the turnover requirements of existing commitments for new convenience retail floorspace and converts this to a floorspace requirement for South Sefton. Even accounting for the existing commitments, it is evident that there is still significant residual expenditure available to support additional food retail provision in South Sefton. Indeed, a residual of £61.0m is identified at 2015, rising to £72.5m at 2020, £85.1m at 2025 and £97.6m at 2030. The residual equates to a convenience goods floorspace requirement of between 5,600 sq.m (net) and 14,700 sq.m (net) at 2020, increasing to between 6,600 sq.m (net) and 17,200 sq.m (net) at 2025, and to between 7,500 sq.m (net) and 19,600 sq.m (net) at 2030. The minimum figure is based on the identified need being met through the



delivery of new foodstores by the leading supermarket operators (Tesco, Sainsbury's, Morrisons or Asda) and the maximum figure relates to need being met by independent or discount operators, which generally achieve lower sales densities. In reality, independent or discount operators are unlikely to deliver the scale of floorspace needs identified under the maximum floorspace requirement in Table 7.7.

- 7.38 The floorspace requirements identified would be sufficient to support the convenience goods element associated with an additional large-sized food superstore (with approximately 4,000 sq. m net convenience floorspace) and a small supermarket (of around 1,500 sq.m net), or two medium sized superstore (of around 2,500 sq. m net) at 2020. By 2030, there would be sufficient residual convenience goods expenditure to support two new large-sized food superstore in South Sefton or three medium sized superstores.
- 7.39 WYG are aware of discount foodstore being proposed as part of a wider mixed use scheme in South Sefton with a gross floorspace of 2,300 sq.m (net 1,600 sq.m), if the store was approved by the Council, then it would make a positive contribution to the identified capacity in South Sefton.

Table 7.7: Quantitative Need for Additional Convenience Goods Floorspace in South Sefton

Year	Convenience Goods				
	£m			Floorspace Requirement (Net)	
	Surplus	Commitments	Residual	Min ^{1*}	Max ^{2*}
2015	89.8	28.8	61.0	4,700	12,200
2020	100.	28.4	72.5	5,600	14,700
2025	113.6	28.5	85.1	6,600	17,200
2030	126.2	28.6	97.6	7,500	19,600

¹ Average sales density assumed to be £13,018 per sq.m (based on the average sales density of the leading four supermarkets as identified by Verdict 2014)

² Average sales density assumed to be £5,000 per sq.m
Rounded to the nearest 100 sq.m
At 2013 prices

- 7.40 The additional convenience goods floorspace needs in South Sefton are around a fifth higher than those in the 2012 update, which identified a residual capacity for between 5,200 sq.m and 13,100 sq.m net convenience floorspace in South Sefton arising in the period 2011 to 2020, rising to between 6,200 sq.m and 15,500 sq.m net in the period up to 2031. The increase in need can primarily be attributed to the substantial increase in the population growth projections for the Study Area since the 2012 Study.



7.41 Moreover, at the time of the 2012 Study, Sainsbury's were considering plans to replace its existing store at Liverpool Road in Crosby with a new store three times the size at Moor Lane in Crosby. The replacement store was expected to alleviate the significant overtrading at the existing Sainsbury's store and enhance the local convenience provision in Crosby, as well as meet a significant part of the need identified in the south of the Borough. The 2012 Study concluded that the identified quantitative needs in Sefton would largely be met by the proposed Sainsbury's store in Crosby, but that there would still be sufficient expenditure to support improvements in centres such as Maghull. However, plans for the replacement store in Crosby were dropped in late 2012.

Capacity for Future Comparison Goods

Sefton

7.42 Turning to comparison goods capacity, it is important to note that our methodology deviates from that which has been deployed in respect of convenience goods for two principal reasons. Firstly, it can be extremely difficult to attribute an appropriate benchmark turnover to existing comparison goods provision given the diverse nature of comparison goods floorspace (including retail warehousing, high street multiples, independent retailers, and so on). Secondly, there tends to be greater disparity between the trading performance of apparently similar comparison goods provision depending on its location, the character of the area and the nature of the catchment. As a consequence, we adopt the approach with comparison goods floorspace that it is trading 'at equilibrium' (i.e. our survey derived turnover estimate effectively acts as benchmark) at 2015. We therefore assume that there is a nil quantitative need for any additional floorspace across the Borough in the 2015 base year.

7.43 Once again, it has been assumed that the future performance of Sefton's facilities will be commensurate with its current market share. Given the strong tourist economy of Sefton, we do consider that Southport, Formby and Crosby will attract significant custom from outside the Study Area. We consider that visitor spending on comparison goods is most likely to be focused on the non-bulky goods with spending on bulky goods generally taking place closer



to visitors' homes. For spending on non-bulky comparison goods, we have therefore assumed 20% inflow for spending at stores in and the edge of Southport town centre, and 10% inflow for stores in Formby and Crosby district centres. We have assumed no inflow for spending on bulky comparison goods. Based on the above assumptions for inflow, we have therefore made an allowance for an additional £44.0m of spending on comparison goods in Sefton to be generated by residents outside of the Study Area. We set out all our detailed assumptions in respect of inflow within Tables 27, 29 and 31 of Appendix 7.

- 7.44 As set out in our convenience goods capacity assessment above, the findings of Sefton STEAM trend report for 2009-2014 identifies that visitors to Sefton spent a total of £146.7m on shopping in Sefton in 2014. Assuming that 80% of the total visitor spend on shopping was spent on comparison goods indicates that an additional £117.4m of comparison spending in Sefton is generated by inflow. We therefore consider that our assumptions for inflow represent a conservative estimate of visitor spending in Sefton.
- 7.45 The inflow allowance has the net effect of increasing Sefton's identified comparison goods survey derived turnover from £738.0m to £782.1m at 2015 (inflow therefore representing 6.0% of the total survey derived turnover).
- 7.46 The £738.0m of comparison goods expenditure claimed by destinations within Sefton at 2015 equates to a market share of 56.5% of all comparison goods expenditure generated by residents of the Study Area. However, WYG note that approximately £228.0m of derived turnover is driven by the attractiveness of facilities around Aintree Racecourse Retail Park and Aintree Shopping Park which represents 31% of the total derived turnover of all facilities in Sefton. The results show that 52% of the trade draw for retail park facilities at Aintree, 52% of this derived from residents within Sefton (Zone S, B, F, C and M) with the remaining 48% derived from outside the Borough, we also recognise that there is likely to trade drawn from outside the defined Study Area given the accessibility of the facilities. Therefore we need to be mindful that this popular retail facility may be over inflating potential retail need at the Borough level. We would therefore question whether the Council would need to plan ahead for such a level of retail investment as it's not commensurate with the likely needs driven by residents in Southport or Bootle but drive by a wider catchment in the sub region and therefore needs to be carefully considered.



7.47 Our assessment ‘rolls forward’ this market share to examine the likely level of comparison goods floorspace required to maintain the role and function of Sefton Borough’s comparison goods retail facilities going forward. By ‘rolling forward’ this market share and making provision for inflow deriving from visitors to the Study Area, we estimate that available comparison goods expenditure in Sefton will be £782.1m at 2015, increasing to £880.8m at 2020, to £1,036.2m at 2025 and to £1,225.5m at 2030.

7.48 Given the forecast increases in comparison goods expenditure and population and allowing for year on year increases in the productivity of existing floorspace, we estimate that by 2020 there will be an expenditure surplus of £14.8m to support additional comparison goods floorspace within Sefton. As set out in Table 7.8, this surplus is forecast to increase to £72.6m at 2025 and then to £151.1m at 2030. Account has been made for the turnover efficiency of existing comparison goods floorspace to increase (on the basis that operators are generally able to make their existing floorspace more productive over time)⁴².

Table 7.8: Estimated Capacity for Comparison Goods Facilities in Sefton Borough

Year	Turnover of Existing Stores - £m ¹	Derived Turnover - £m ²	Surplus Expenditure
2015	782.1	782.1	0.0
2020	866.0	880.8	14.8
2025	963.6	1,036.2	72.6
2030	1,074.4	1,225.5	151.1

¹ Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 12.1 Addendum (Oct 2014)
² Assumes constant market share within the Study Area (56.5%) but includes a non-bulky goods inflow of 20% for Southport Town Centre and 10% for Formby and Crosby District Centres.
 At 2013 prices

7.49 The surplus comparison retail expenditure capacity identified in Table 7.8 for each of the forecast years is lower than in the 2012 Study, which identified a surplus of £34.9m in 2021, £99.4m in 2026 and £271.7m in 2031⁴³. Whilst the projected population growth in the Study Area is substantially higher than at 2011, the fall in market share achieved by comparison retail facilities in Sefton, by approximately 2 percentage points, has reduced the proportion of the Study Area expenditure expected to be available to support new facilities in Sefton. Forecast growth in spending on SFT has increased; Experian’s current forecast is for SFT to

⁴² Such increases have been derived from the projections set out in Table 4a of the Addendum to Experian Retail Planner Briefing Note 12.1 (these being +2.3% at 2016, +2.0% per annum between 2017 and 2021, and +2.2% between 2022 and 2031)

⁴³ We have converted the surplus expenditure figures identified in the 2012 Study from 2010 to 2013 prices.



account for 15.6%⁴⁴ of all comparison goods spending at 2030 compared to its forecast of 12.0% at the time of the 2012 Study.

- 7.50 There is one commitment for new comparison floorspace in Sefton, which is the redevelopment of the Strand Shopping Centre in Bootle for a T J Hughes store. The T J Hughes store has since opened (after completion of the household survey), will provide an estimated 416 sq.m of new comparison goods sales floorspace and draw some £0.5m of expenditure from South Sefton as shown in Table 7.9 below. In addition, a number of committed schemes are planned outside Sefton that are expected to impact on the identified expenditure capacity for new comparison goods floorspace in Sefton. As set out at Table 7.9 below, we estimate that the extant retail planning permission⁴⁵ for the redevelopment of land at Cherryfield Drive in Kirkby for a new foodstore and comparison retail units will generate an uplift in comparison retail turnover of £105.9m if operational at 2015, of which £7.5m is expected to be drawn from the South Sefton. We estimate that the commitments for new foodstores in Fazakerley and Everton would have comparison retail turnovers of £11.6m and £22.0m, respectively, if operational in the 2015 base year, of which 10% is expected to be drawn from South Sefton.
- 7.51 We estimate that the commitments for a new Aldi in Walton and Lidl in Fazakerley would have comparison goods turnovers of £1.9m and £0.2m at 2015, respectively, of which we expect that 30% and 15% would be drawn from South Sefton. In total, we estimate that existing commitments for new comparison retail floorspace will draw some £11.9m of expenditure from Sefton, all of which will be drawn from, South Sefton. None of the commitments are expected to draw any trade from North Sefton. Full details of the assumptions made in estimating the turnover of commitments are provided in the notes which accompany Table 32 of Appendix 7. It is highly probable that once all these development are built it could reduce the current market share.

⁴⁴ Adjusted for SFT sales from stores. Sourced from page 21 of Experian Retail Planner Briefing Note 12.1.

⁴⁵ As reported by Knowsley Council to WYG at September 2015

Table 7.9: Extant Comparison Commitments in the Study Area

Zone	Planning Application Reference	Proposal	Net Comp Sales (sq.m)	Sales Density (£ per sq.m)	Turnover at 2015 (£m)	Turnover from North Sefton at 2015 (£m)	Turnover from South Sefton at 2015 (£m)
B	04/01/2015	Partial redevelopment for a T J Hughes store, Strand Shopping Centre, Bootle	416	1,622	0.7	0.0	0.5
K	10/00505/OUT	Redevelopment of land at Cherryfield Drive, Kirkby					
		Foodstore	4,750	9,245	43.9	0.0	4.4
		Retail units	17,069	4,233	72.2	0.0	3.6
		Retail units (Demolitions)	-6,844	1,500	-10.3	0.0	-0.5
L	130/0656	Foodstore and petrol filling station shop, East Lancs Road/Stonebridge Lane, Fazakerley	1,176	9,860	11.6	0.0	1.2
L	13F/1178	Foodstore and petrol filling station shop, Great Homer Street, Everton (Project Jennifer)	2,212	9,932	22.0	0.0	2.2
L	15F/1129	Aldi foodstore, former Walton Hospital, Rice Lane, Liverpool	251	7,379	1.9	0.0	0.6
L	14F/1802	Lidl foodstore, Longmoor Lane, Fazakerley	204	818	0.2	0.0	0.0
Total					153.4	0.0	11.9

Source: Table 32 of Appendix 7
2013 Prices

7.52 Table 7.10 below sets out the residual comparison expenditure capacity in Sefton, taking into account the turnover requirements of existing commitments for new comparison retail floorspace and converts this to a floorspace requirement for Sefton. Even accounting for the existing commitments, it is evident that there is still significant residual expenditure available to support additional comparison retail provision in Sefton. Indeed, an expenditure residual of £1.7m is identified at 2020, rising to £57.9m at 2025 and £134.8m at 2030.

7.53 In order to account for the differing trading performance of potential end operators, we have applied sales densities of £3,000 per sq.m and £5,000 per sq.m to the identified residual expenditure. Allowing for increases in the productivity of existing floorspace, it is estimated that by 2020 there will be a requirement for an additional 300 sq.m (net) to 500 sq.m (net) of comparison retail floorspace, depending on the format of the floorspace and assuming current market share of existing comparison retail facilities in Sefton is maintained. The



requirement rises to between an additional 9,400 sq.m and 15,700 sq.m of net floorspace by 2025 and to between an additional 19,600 sq.m and 32,700 sq.m of net floorspace by 2030, by which time increases in comparison goods expenditure are forecast to be substantial.

Table 7.10: Quantitative Need for Additional Comparison Goods Floorspace in Sefton

Year	Comparison Goods				
	£m			Floorspace Requirement (Net)	
	Surplus ¹	Commitments ²	Surplus ¹	Commitments ²	Surplus ¹
2015	0.0	11.9	-11.9	-2,400	-4,000
2020	14.8	13.2	1.7	300	500
2025	72.6	14.7	57.9	9,400	15,700
2030	151.1	16.3	134.8	19,600	32,700

¹Allows for inflow of non-bulky comparison goods expenditure of 20% for Southport town centre and 10% for Formby and Crosby district centres turnover

² Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 12.1 Addendum (Oct 2014)

³ Average sales density assumed to be £5,000 per sq. m at 2015

⁴ Average sales density assumed to be £3,000 per sq. m at 2015

*Rounded up to nearest 100 sq. m

At 2013 prices

7.54 Table 5.3 in Section 5 shows that there is currently at total of approximately 130,900 sq.m gross of comparison retail floorspace within Sefton’s defined retail centres and local shopping parades, providing an estimated 91,600 sq.m net of comparison retail floorspace⁴⁶. A further 39,000 sq.m net⁴⁷ of comparison retail floorspace is located within Sefton’s retail parks and 12,300 sq.m net of comparison retail floorspace is located within the main edge and out-of-centre foodstores in Sefton. In total we estimate that approximately 142,900 sq.m net comparison retail floorspace is currently located within Sefton. The floorspace requirements identified at 2030 in Table 7.10, of between 19,600 sq.m and 32,700 sq.m, therefore represent an increase in net comparison floorspace in Sefton of between 14% and 22%.

7.55 Table 5.3 further shows that there is currently at total of approximately 57,400 sq.m gross of vacant floorspace in Sefton’s defined retail centres and local shopping parades. Assuming that 20% of this is vacant comparison retail floorspace and assuming a net to gross ratio of 70% indicates that there is approximately 8,000 sq.m net of vacant comparison retail floorspace in Sefton. A further 6,000 sq.m gross of retail floorspace in currently vacant within Sefton’s retail parks⁴⁸, potentially providing 4,800 sq.m of net comparison retail floorspace. The

⁴⁶ Assuming a net to gross ratio of 70%.

⁴⁷ Gross floorspace of Central 12, Ocean Plaza, Meols Cop, Kew and Switch Island Retail Parks, Aintree Shopping and Retail Parks, and B&Q at Meols Cop sourced from Completely Retail (Sept 2015). Assumed net to gross ratio of 80%.

⁴⁸ Central 12, Ocean Plaza, Meols Cop, Kew and Switch Island Retail Parks, and Aintree Shopping and Retail Parks.



Council should consider the suitability of vacant floorspace in the Borough to accommodate the future retail needs as required by the sequential test set out in the NPPF. It is emphasised, however, that the location and format of existing vacant retail floorspace (such as the size of a unit) may not match the requirements of modern and national multiple retailers or their locational requirements and this would need to be considered through development control policy review at an appropriate time.

- 7.56 The identified needs for additional comparison goods floorspace in the period up to 2025 are higher than the forecasts in the 2012 Study, which identified no capacity for new comparison retail floorspace in the period up to 2021, and a requirement for between 8,500 sq.m and 14,200 sq.m net comparison floorspace in Sefton arising in 2026. A number of planning permissions for new comparison goods floorspace in Sefton remained extant at the time of the 2012 Study, which were expected to provide an additional 10,800 sq.m of comparison goods floorspace within Sefton and absorbed the identified surplus expenditure identified across the Borough in the period to 2021.
- 7.57 A number of these permissions have subsequently expired or remain unimplemented, including the permission for a retail warehouse at Moor Lane in Thornton (ref. S/2010/1728), the redevelopment of Central Square in Maghull (ref. S/2010/1503), the erection of 5 non-food retail units at Central 12 Retail Park in Southport (S/2011/0204), erection of 3 non-food retail units on the site Of Former Netto, Orrell Lane, Bootle (ref. S/2010/1157). A number of permissions for the installation of mezzanine floors at Meols Cop Retail Park in Southport also remained extant at the time of the 2012 Study (ref. N/2007/0960, S/2009/0671 and N/2009/0854). However, Meols Cop Retail Park is currently the subject of a subsequent planning application for the partial redevelopment of the retail park for a Sainsbury's store (ref. DC/2014/00887) and the installation of new mezzanine floorspace within the units in question are currently not being progressed by the retail park owners.
- 7.58 As discussed in paragraph 7.45 WYG confirmed that a significant level of the capacity identified over the plan period is a result of the out-of-centre retail park facilities at Aintree; however, if the derived turnover of these facilities from outside Sefton was excluded from the capacity figures and allowances made for planning commitments outside Sefton then the likely capacity for the Borough would reduce to between 16,300 sq.m (net) and 27,200 sq.m



(net), representing a reduction of 19% at 2025 and a 17% at 2030 from the figures in Table 7.10.

7.59 WYG have undertaken a benchmark turnover analysis of the existing retail parks where a clear tenant line up can be ascertained. The results show that the performance of the existing retail parks is varied, whilst we have seen their role slightly diminish in terms of their overall market share, the results show that some of the retail parks are trading stronger than others. At this strategic spatial review, the results show that overall cumulatively the retail parks are overtrading, whereby WYG estimate that existing retail parks (including comparison goods within supermarkets) have a benchmark turnover of £272.4m compared to a derived turnover of £334.6m, effectively overtrading by £62.2m or 23% above expected levels. However, the results show that this principally driven by the strong trading performance of facilities around Aintree Retail Park and Aintree Shopping Park, which collectively have a derived turnover of £228.0m compared to an expected benchmark of £119.1m. As stated earlier this corresponds to the fact that there is likely to be a significant level of trade drawn from outside the Study Area. This compares to the satellite retail parks around Southport (namely Central 12, Ocean Drive, Meols Cop, Kew Retail Park), which collective under trade, where collectively these stores have a derived turnover of £100.4m compared to an expected benchmark of £127.9m. The results also demonstrate that Switch Island Retail Park is not trading at expected benchmark levels.

North Sefton

7.60 Table 7.11 below sets out the residual comparison expenditure capacity which will be available to support new comparison goods retail floorspace in North Sefton only. In total, facilities in North Sefton retain £355.8m of comparison goods expenditure, which equates to a market share of 27.2%, and our assessment of surplus expenditure capacity in North Sefton assumes that the current market share will be maintained over the forecast period. As we explained above, for spending on non-bulky comparison goods, we have made an allowance for an additional 20% for spending at stores in and the edge of Southport town centre and 10% inflow for stores in Formby district centre to account for visitor spending in these centres.



7.61 None of the commitments scheduled in Table 7.9 above are expected to impact on the expenditure capacity available to support new comparison goods floorspace in this area of Sefton and the residual expenditure available to support new convenience goods floorspace in North Sefton is therefore the same as the identified surplus expenditure. The Table 7.11 then converts the residual expenditure into a floorspace requirement for North Sefton.

Table 7.11: Quantitative Need for Additional Comparison Goods Floorspace in North Sefton

Year	Comparison Goods				
	£m			Floorspace Requirement (Net)	
	Surplus ¹	Commitments ²	Residual	Min ^{3*}	Max ^{4*}
2015	0.0	0.0	0.0	0	0
2020	7.2	0.0	7.2	1,300	2,200
2025	35.0	0.0	35.0	5,700	9,500
2030	72.9	0.0	72.9	10,600	17,700

¹Allows for inflow of non-bulky comparison goods expenditure of 20% for Southport town centre and 10% for Formby district centre turnover

²Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 12.1 Addendum (Oct 2014)

³ Average sales density assumed to be £5,000 per sq. m at 2015

⁴ Average sales density assumed to be £3,000 per sq. m at 2015

*Rounded up to nearest 100 sq. m

At 2013 prices

7.62 Table 7.11 shows a small positive residual expenditure residual of £7.2m, which would be available to support additional comparison retail floorspace arising in the period up to 2020, rising to £35.0m in 2025 and £72.9m in 2030. By applying an average sales density range of between £3,000 and £5,000 per sq.m to the residual expenditure, it is estimated that at 2020 there will be a requirement for between 1,300 and 2,200 sq.m (net) of new comparison good floorspace in North Sefton to enable this area of Sefton to maintain its current market share. This requirement increases to between 5,700 sq. m and 9,500 sq.m (net) by 2025, and 10,600 sq. m and 17,700 sq. m (net) by 2030.

7.63 As for Sefton as a whole, the overall requirement for comparison goods floorspace in North Sefton has declined substantially since 2012 primarily attributable to a slight fall in the market share of facilities in North Sefton and increases in allowances for SFT.



South Sefton

7.64 Table 7.12 below sets out the residual comparison expenditure capacity which will be available to support new comparison goods retail floorspace in South Sefton only. In total, facilities in South Sefton retain £382.2m of comparison goods expenditure, which equates to a market share of 29.3%, and our assessment of surplus expenditure capacity in South Sefton assumes that the current market share will be maintained over the forecast period. As we explained above, for spending on non-bulky comparison goods we have made an allowance for an additional 10% inflow for spending at stores in Crosby district centre to account for visitor spending in this centre.

7.65 As set out in Table 7.9 above, there are a number of commitments in and near to Sefton which are expected to impact on the expenditure capacity available to support new comparison goods floorspace in South Sefton. In assessing the residual comparison expenditure capacity in South Sefton, we therefore make an allowance for £11.9m in the 2015 base year for the turnover requirements of existing commitments for new comparison retail floorspace. We have allowed the turnover requirements of existing commitments to grow over the forecast period at the rates set out in Table 4b of Experian’s Retail Planner Briefing Note 12.1 Addendum (October 2014) to account for growth in floorspace efficiency.

Table 7.12: Quantitative Need for Additional Comparison Goods Floorspace in South Sefton

Year	Comparison Goods				
	£m			Floorspace Requirement (Net)	
	Surplus ¹	Commitments ²	Surplus ¹	Commitments ²	Surplus ¹
2015	0.0	11.9	-11.9	-2,400	-4,000
2020	7.7	13.2	-5.5	-1,000	-1,700
2025	37.6	14.7	22.9	3,700	6,200
2030	78.3	16.3	61.9	9,000	15,000

¹Allows for inflow of non-bulky comparison goods expenditure of 10% for Crosby District Centre turnover

² Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 12.1 Addendum (Oct 2014)

³ Average sales density assumed to be £5,000 per sq. m at 2015

⁴ Average sales density assumed to be £3,000 per sq. m at 2015

*Rounded up to nearest 100 sq. M

2013 prices

7.66 In the short term period up to 2020 existing commitments will absorb all of the identified surplus comparison retail expenditure capacity in South Sefton. By 2025, strong population growth and growth in spending on comparison goods will generate a positive expenditure



residual of £22.9m, which would be available to support additional comparison retail floorspace in South Sefton, rising to £61.9m by 2030. By applying an average sales density of £3,000 per sq.m and £5,000 per sq.m to the identified residual expenditure, it is estimated that at 2025 there will be a requirement for between 3,700 and 6,200 sq.m (net) of new comparison good floorspace in South Sefton, which is comparable to the floorspace requirement identified in the 2012 Study. In the longer term period to 2030, the floorspace requirement increases to between 9,000 sq.m and 15,000 sq.m (net) by 2030, and has declined from the findings of the 2012 Study, primarily attributable to increases in allowances for SFT.

- 7.67 As discussed in paragraphs 7.45 and 7.57, a significant level of the capacity identified over the plan period is a result of the out-of-centre retail park facilities at Aintree. If the derived turnover of these facilities from outside Sefton is excluded from the capacity figures then the likely capacity for South Sefton would reduce to between 2,000 sq.m and 3,300 sq.m net at 2025 and to between 5,700 sq.m and 9,500 sq.m net at 2030, representing a reduction from the figures in Table 7.12 of 47% and a 37%, respectively.
- 7.68 This capacity should be focused towards central sites within Bootle as first priority under the sequential approach and then only other edge of centre sites or out-of-centre sites that are accessible that are well connected to the town centre.



8.0 Summary and Conclusions

8.01 The NPPF requires LPAs as part of their Local Plan to set out a strategy for the management and growth of centres over the plan period. As part of their strategy, LPAs should, inter alia:

- Recognise town centres as the heart of their communities and pursue policies to support the viability and vitality;
- Define a network and hierarchy of centre this resilient to change to anticipated future economic changes;
- Define the extent of town centres and primary shopping areas, based on a clear definition primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;
- Promote competitive town centre that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
- Retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
- Allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres;
- Allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre; and
- Set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres.

8.02 Each of the above requirements is considered where relevant below in relation to Sefton in the context provided by this Study.



The Proposed Retail and Town Centre Strategy

- 8.03 Since completion of the Sefton RSR in 2012, the retail landscape across the UK has changed in response to the UK recession that commenced in 2008 and exited in 2009⁴⁹, and there was an extended period of limited investment in the retail sector due to suppressed sales and confidence. However, there has been signs of recovery in comparison goods and leisure services expenditure growth levels, whilst the convenience goods growth remains challenging, this is in the context that there remains continued competition from special forms of trading (specifically on-line sales), which now represents 12.0% of all retail sales (2012 this was 8.3%). Despite this since 2012 there has been some improvements to the retail offer (through an increase in floorspace) in Sefton, there has been some relatively small extensions in existing foodstores, as well as limited improvement to the non-food sector through Go Outdoors and Wren Furniture both in out of centre locations as well as variations to conditions and improvement at Aintree Retail Park through mezzanine floorspace, although it is difficult to quantify whether these have been implemented or not. Notwithstanding these improvements, the comparison goods market shares of retail parks has not significantly improved overall between 2012 and 2015, in fact the market share has declined by 2 percentage points in the Study Area, but market share improvements have been varied zone by zone.
- 8.04 Part 6 of Policy ED2 of the draft local plan identifies Southport and Bootle as the two principal town centres in the hierarchy for the Borough, with Southport serving the north and Bootle the south. As considered in Sections 5 and 7, the evidence shows that the comparison good market shares of the Borough's overall, Southport town centres and out-of-centre facilities have declined to that those enjoyed in 2012, whilst Bootle town centre and the four district centres (combined) market share has increased. However, based on current comparison goods market share being delivered, and after taking into account the proposals outside Sefton that are likely to affect the market share in the future and once built we estimate that Sefton can sustain between 19,600 sq.m (net) and 32,700 sq.m (net) of new comparison goods floorspace by 2030, which is the equivalent of between 28,000 sq.m (gross) and 46,700 sq.m (gross)⁵⁰. This would add between 14% and 22% to the current comparison

⁴⁹ The widely accepted definition of a recession is two consecutive quarters of negative economic growth" [Recession Britain, Economic and Social Research Council], UK GDP Growth was negative between Q2 2008 (-0.2%) and Q3 2009 (+0.2%) but there were also two negative quarters in 2012 but not consecutive.

⁵⁰ Net to gross ratio based on 70/30 and rounded to the nearest 100 sq.m



(net floorspace) goods stock in the Borough over the next 15 years if built. In terms of the minimum level of capacity for both North Sefton and South Sefton, then this is broadly split between the two areas, with 10,600 sq.m (net) in and around Southport and 9,000 sq.m (net) in and around Bootle.

- 8.05 WYG note that these figures are significantly lower than those identified in the RSR (2012)⁵¹ that identified between 31,800 sq.m (net) and 53,000 sq.m (net) by 2031, whereby the latest estimates only represent circa 62% of the levels previously identified. The principal reason for this reduction is due to changes in expenditure growth levels, increased floorspace productivity and claims on on-line/internet sales as well as a reduced market share. The capacity figures in Section 7 are estimated at a specific point in time, therefore, given the fluidity of the retail market WYG would recommend that any capacity requirements set out in the local plan should refer to the latest retail capacity estimates available in the Retail Study rather than being fixed for the duration of a planning policy document, which can often last 10 or 15 years. This will allow the policy to be cross referenced to the latest evidence base and ensure that the policy is sufficiently flexible enough to monitor and accord with the most up to date data.
- 8.06 As set out in paragraph 7.57 the comparison goods capacity figure is over inflated to the popularity of the significant retail park facilities around Aintree, and if allowances for trade draw from outside Sefton to these facilities is excluded then the capacity figures above would be reduced to between 16,300 sq.m and 27,200 sq.m at 2031, this is the equivalent of 23,300 sq.m (gross) and 46,700 sq.m (gross) of floorspace across the Borough. The net figures represent between an 11% and 19% increase in the current comparison goods portfolio. The adjustment to reflect facilities at Aintree do not affect the capacity in North Sefton, but would reduce the capacity in South Sefton from 9,000 sq.m (net) (minimum) to circa 5,700 sq.m.
- 8.07 WYG recognise that there are also significant levels of vacant comparison goods floorspace (circa 12,800 sq.m net) across the Borough both in centre and out-of-centre, and subject to its suitability and viability, a strategy should be put in place under sustainable development principles to re-utilise or reconfiguration of such vacant space before consideration of new out-of-centre retail floorspace elsewhere in the Borough. This existing retail infrastructure could absorb a significant level of capacity, and as the wider economy improves it is likely

⁵¹ Taken from Table 7.8 of Sefton RSR (2011) page 49



that such floorspace will be re-occupied and help towards an improved retail offer that subsequently improves retention of local trade in the Borough and help reduce the need of Sefton's residents to travel to facilities outside the Borough. Whilst some of this vacant floorspace resource could be utilised to absorb some of the capacity, we understand that some of current vacant floorspace may not fully match some operators and tenants requirements and therefore new purpose built floorspace may be required if any re-configuration is unable to meet future demands, however, we expect that this be tested through development control policy tests.

- 8.08 In turning to convenience goods retailing, the results show that Sefton's main food market share has again improved since 2011 in the Study Area, and that there remains exceptionally and a sustainable high level of main food trade retention in the principal zones covering Sefton demonstrating that the Borough has very limited expenditure leakage. However, given improvements to the convenience sector outside Sefton in North Liverpool over the next five years then we expect that the trade retention from Zones NL and NK may be affected similar to that experienced in Zone O after improvements to facilities in Ormskirk and beyond. Notwithstanding this the updated Study has still found significant convenience goods capacity, although this is mainly focused in south Sefton due to the significant over trading found in this area. The latest results show that the level of capacity (between 1,700 sq.m (net) and 4,400 sq.m (net)) previously found in North Sefton has reduced since that identified in 2012 (between 5,100 sq.m (net) and 12,800 sq.m (net)), this is mainly due to improvements in the retail offer and as a result of improvements to discount retailer's performance since 2012 and reduction in the over trading of facilities across North Sefton. Notwithstanding this in South Sefton, like in 2012, WYG estimate that there is remains capacity for improvements in Bootle, Crosby or Maghull, and that intervention to provide new facilities in this part of Sefton may need to be re-considered to help identify such capacity whilst at the same time provide additional anchors to these important town centres. However, WYG understands from our involvement over the long term that it has proved difficult to secure and assemble a suitable site in and around the south of the Borough both at in centre and out-of-centre locations but the Council are willing to consider such investment positively if it meets wider sustainable development principles.
- 8.09 In addition to the relaxation of permitted development rights (GDPO) in 2013, and although not specifically considered within this Study, we would also recommend that the Council consider the application of local development orders (LDO), these were introduced in 2009



through the insertion of section 61A of the Town and Country Planning Act 1990, and provide permitted development rights on specific sites in order to provide a simplified planning environment to encourage development to come forward. WYG has seen the successful adoption of such orders in other administrative areas to encourage new residential and mixed use development on vacant town centre regeneration sites and to encourage active residential and commercial uses on vacant upper floors within town centres. The inclusion of LDO's in town centre areas, can remove the need for planning applications for certain uses to be made by developers and help encourage such investment by providing a positive and flexible approach to uses classes to help revitalise either the whole or pockets of a town centre which are suffering from a high level of vacancy at ground or upper floors. They could also be used following masterplanning exercises to help positively promote commercial development in specific areas where a specific need for such uses has been identified.

8.10 The digital shopping revolution has impacted on the high street by offering local consumers with convenient alternatives to simply transact with local business in the traditional physical manner. Therefore WYG recommend that the Council considers initiatives to digitise the high street⁵² to help it adapt and engage with the digital revolution that is transforming the ways we shop and buy products, failure to embrace such structural changes may further erode the vitality and viability of the Borough's town centres in the short to longer term. It is vitally important that the Borough's town centre seek to keep pace with consumers and technology advances which are changing in an extremely rapid velocity. The first priority will be to assess the fixed broadband coverage, mobile data coverage and public access Wi-Fi hotspots within and around defined town centres to understand whether the basic digital access and infrastructure is available to allow users to embrace and use on-line shopping channels. Measures should also be encouraged to ensure that town centre businesses are delivering OMNI channelling, which basically supports all formats of trading platforms, from website, to smart phone, click and collect to traditional bricks and mortar channels. This multiple channel approach ensures that town centre enterprise and businesses are maximising interactions with both physical and digital consumers.

8.11 WYG note that Southport and Bootle town centres (as well as smaller district centres) could benefit from a dedicated town centre strategy which will seek to provide a long term development framework to improve its future vitality and viability, this could follow the form of the Area Action Plan (AAP) or in the form of a Town Centre Investment Prospectus which

⁵² Digital High Street 2020 Report, Digital High Street Advisory Board, March 2015



seeks to encourage new development and investment decisions in the town centre. Such a document could help to direct private sector investment into specific sites and management opportunities through a comprehensive framework as well as introducing digital initiatives to improve the town centre performance in the long term. WYG understand that a Southport masterplan is currently being completed and will help foster and positively plan for the economic improvement of the town centre's retail and leisure role.

- 8.12 Whilst we have seen some changes in both the convenience and comparison goods market share for the Borough's town centres, the vitality and viability of Sefton remains generally satisfactory whilst Bootle has seen signs of improvement but is still vulnerable. Both town centres still have a stubbornly high level of vacancies and therefore in addition to planning measures to improve the vitality and viability, WYG would recommend that the Council seek to consider innovative fiscal incentives to help bring back empty shops into active use. The Council need also to consider innovative ways to improve the trading performance of not only new entrepreneurs and enterprise that may seek representation in the town centre but also to safeguard existing businesses which may have been long established. Many local authorities in both the North West and beyond are now considering ways to reduce the burden of entry to the retail market through incentives through the business rates system and devolution of powers may create a mechanism to achieve this moving forward.
- 8.13 Despite high convenience goods retention levels overall there is still a need to improve the quality of the comparison goods offer in Southport and Bootle, although this may be difficult given the position of the town centres in the wider hierarchy and the improved influence of Liverpool city centre in recent years. Like other town centres in the UK, we would recommend that the Council consider the 'beyond retail' scenario, and seek to introduce other complementary land uses such as leisure, residential, education, health and community uses in to the town centres rather than rely on retail land uses. WYG also recommend that measures are put in place to consolidate and regenerate the markets in the town centre. Whilst these offer an important facility for young and local business to test their business models and products, we believe that a new market strategy should be considered for the future, which not just considers the spatial location of the market but also its future management and structure.
- 8.14 As set out in the above, whilst the above floorspace capacity requirements are just one important element to delivering a sustainable town centre trading environments, WYG would



recommend that significant resources are focused towards the soft management of the existing town centre environments and accommodation through advanced town centre management infrastructure as well as innovative fiscal incentives to encourage existing and future business to invest in new enterprise. A well co-ordinated and holistic economic, environmental, social and cultural strategy needs to be considered to ensure that the Borough's town and district centres remain key interfaces for future resident and business communities.

Impact Test Threshold

- 8.15 In accordance with the requirements of paragraph 26 of the NPPF, it is considered appropriate to identify thresholds for the scale of edge of centre and out of centre retail, leisure and office development which should be the subject of an impact assessment. In this regard, we note that the Policy ED2 of the draft Local Plan (Part 1) sets out the local floorspace threshold policy on retail impact for new or additional floorspace for main town centre uses in out of centre locations should demonstrate compliance with the sequential and impact tests. WYG note that this should also relate to change of use applications and section 73 applications which may seek variations to existing conditions which restrict the level and type of goods to be sold from such facilities.
- 8.16 Any such threshold policy applies only to the impact test (all planning applications for main town centre uses that are not in an existing centre and not in accordance with an up-to-date development plan should be subjected to the sequential test⁵³).
- 8.17 In our view, any such threshold policy should, in order to accord with the requirements of national planning policy, only apply to the impact test. All main town centre proposals should be the subject of the sequential test (though it is accepted that, in practice, there will be occasions where a particular need can only be met at a particular location). Therefore, in implementing a local threshold policy, it is considered more appropriate to utilise a range of thresholds, relating to the type of centre the proposed development is proximate to.
- 8.18 The 'Threshold Policy for Main Town Centre Uses Impact Test', sets out the policy context, methodology, analysis and justification for the thresholds set out in Policy ED2 of the Sefton Local Plan. The results of the analysis concluded that the proposed threshold policies in Policy

⁵³ With the exception (in accordance with paragraph 25 of the NPPF) of small scale rural office proposals and other small scale rural development



ED2 were considered appropriate despite being significantly below the national threshold, and are considered appropriate as they reflect the proportions and size compositions of the town, district and local centres. They reflect the size of competition from edge and out of centre developments and they are low enough to account for the vulnerabilities of the town, district and local centres whilst providing sufficient freedom for smaller developments to avoid the need for an impact test. The thresholds reflect that, in our experience, it will only generally be development of a scale greater than these thresholds which could lead to a 'significant adverse' impact, resulting in the refusal of an application for town centre uses in accordance with the provisions of paragraph 26 of the NPPF.

- 8.19 In summary, it is considered that the thresholds set out in Policy ED2 are appropriate for the intended purpose and are reflective of the local situation within Sefton and accord with the NPPF.

Review of Policy ED2 and other Related Policies

- 8.20 WYG has considered the appropriateness of the proposed wording as set out in the draft Local Plan for Policy ED2 in order to establish whether the policy is fit for purpose and consistent with the NPPF. Following consideration of the policy a revised draft wording which details in full suggested amendments and revised wording for the policy is provided at Appendix 9. An explanation of the main suggested amendments is provided below.
- 8.21 WYG's amended wording for Policy ED2 at Part 2 incorporates additional text to establish that when considering applications for main town centre uses in edge of centre and out of centre locations, preference should be given to accessible sites that are well connected to defined centres or sites within existing retail parks. The amended wording also seeks to specifically identify existing retail parks within the Borough in the interest of clarity. Furthermore, text is also added to require applicants to demonstrate consideration being given to flexibility on the format and scale of proposals.
- 8.22 In providing preference to sites which are well connected to existing defined centres, the policy is made more consistent with the requirements of the sequential test set out within the NPPF. The same is the case in requiring applicants (and Local Planning Authorities) to consider flexibility regarding the format and scale of proposals. In providing a preference to existing retail park locations, a mechanism is built in to the policy to provide preference to



existing retail park destinations above that of other out of centre locations which do not have established retail uses. This is in recognition of the existing role retail parks play in meeting the shopping (and leisure) needs of the local population as well as to direct development to sites with existing infrastructure in place which can appropriately support main town centre uses. This addition to the policy would also help to provide a more complete sequential hierarchy which as far as possible aligns with the themes of sustainable development. Providing a preference to existing retail park locations above that of other out of centre locations also seeks to address queries raised by the Inspector presiding over the examination of the Local Plan.

- 8.23 At Part 2 Policy ED2, the requirement for the impact of development proposals on the vitality and viability of designated centres in neighbouring local authorities is recommended to be deleted as the current structure is confusingly adding impact tests to the requirements of the sequential approach. WYG recommend that the two tests are clearly defined separately otherwise this will not be consistent with paragraph 24 and 26 of the NPPF. Therefore, Part 3 of the ED2 has been re-written to ensure that after the local impact threshold, the impact considerations as set out in the NPPF are then considered.
- 8.24 Part 4 of Policy ED2 has been amended to more appropriately define Primary Shopping Area for the town and district centres. Within the draft Local Plan, an inconsistency in wording exists between the draft Local Plan Submission Document, (specifically Policy ED2) and the Local Plan Proposal Maps. Policy ED2 rightly seeks to identify 'Primary Shopping Areas' and details these areas through the use of addresses listed in Figure 7.2. The draft Local Plan Proposal Maps are inconsistent with this in referring to 'Primary Retail Frontage' for the same addresses.
- 8.25 Paragraph 23 of the NPPF stipulates that in drawing up planning policies, local authorities should define Primary Shopping Areas. The draft Proposals Maps and Policy ED2 fail to define Primary Shopping **Areas**, instead identifying primary frontages. To address this issue, WYG have identified suggested Primary Shopping Areas for each of the town and district centres. It is advised that Figure 7.2 is removed from Policy ED2 and replaced by reference to the identified Primary Shopping Areas shown on a revised Proposals Maps. The key on the Proposals Maps should also be updated to remove reference to 'Primary Retail Frontage'.



8.26 Part 4(iii) of the Policy ED2 refers to development within Primary Shopping Areas not resulting in:

'...an unacceptable cluster of non-retail uses.'

8.27 What constitutes an '*unacceptable cluster*' remains undefined. Consideration could be given to defining what this term is intended to mean in practice. A potential option could be to define a length of frontage within the policy for which it would be considered unacceptable to be occupied exclusively by non-retail units. Alternatively, a proportional approach could be taken where it would be considered unacceptable for more than 50% of units on a frontage, for example, to be in brought into non-retail use.

8.28 In terms of the part of Policy ED4 that identifies mixed use area around established centres, generally the uses listed within the policy are acceptable and considered complementary to those found within town centres and therefore the policy broadly aligns with the draft Local Plan objective to support the vitality and viability of existing centres. The Bootle Central Area is identified as being dominated by high rise office buildings, although with demand expected to reduce for this use in the area over the plan period, it is expected that a new role involving the introduction of complementary uses will need to be established in the area. The Waterloo Mixed Use Area extends along Crosby Road North and connects the two halves of the district centre. In relation to Waterloo, WYG's suggested district centre boundary includes two short terraces of properties on the east side of Crosby Road North which presently form the northern tip of the Mixed Use Area shown on the draft Proposals Maps. WYG's survey of the centre found the small scale commercial units at these properties to largely be in use providing financial and professional services and other main town centre service uses. With consideration given to the existing uses at these properties and the connections with the neighbouring retail frontages on the street, it is considered that these properties would more appropriately form part of the district centre rather than part of the Waterloo Mixed Use Area.

8.29 In terms of part of the Policy ED6 that identifies priority regeneration areas, it is considered that elements of the wording for Part 2 of the policy are somewhat confusing, and are not entirely consistent with the Proposals Maps. Part 2(a) refers to 'Central Southport'. This is intended to correspond with the 'Regeneration Area' shown on the proposals map. It would be clearer if part 2(a) referred to the 'Central Southport Regeneration Area'. Without care, confusion could also arise in that the draft Local Plan separately defines the 'Southport

Central Area', which is distinctly different to the 'Central Southport' area referred to in part 2(a).

- 8.30 The other three Regeneration Areas identified in Part 2 are each referred to as centres, ('Crosby Centre', 'Maghull Centre' and 'Seaforth Centre'). These policy designations are again identified on the Proposals Maps as 'Regeneration Areas' and it would be clearer if Part 2 referred to them as such, (i.e. Crosby Centre Regeneration Area). It is important to clarify that the regeneration 'centres' identified in ED6 are different from the town, district and local centre designations set out in draft Policy ED2 and referred to elsewhere in the draft Local Plan. Whilst it is accepted that in the case of Crosby and Maghull the defined district centre boundary and the Regeneration Area boundary are the same, this does not apply for Southport or Seaforth. Seaforth in fact is not a designated centre within the draft Local Plan, (by virtue of not being listed in the retail hierarchy at ED2), and reference to this location being a 'centre' in policy ED6 is misleading.

Town Centre Boundaries and Primary Shopping Area

- 8.31 In addition to the amendments to Policy ED2, and following a detailed assessment of each of the town and district centres within the Borough, including undertaking land use surveys, WYG have sought to identify appropriate boundaries for each centre town and district centre and to identify Primary Shopping Areas (PSAs). Plans identifying WYG's proposed boundaries and PSAs for each respective centre are provided within Appendix 8.
- 8.32 Paragraph 23 of the NPPF identifies that planning policies should set out policies for the management and growth of centres over the plan period. Within this remit paragraph 23 states that in drawing up local plans, local planning authorities should:

'define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres,'

- 8.33 In addition, We have reviewed the appropriateness of the existing boundaries based on the definitions provided by the NPPF (Annex 2) as follows:

Town centre: Area defined on the local authority's proposal map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area.



- 8.34 The draft Local Plan through the supporting Proposals Maps identifies proposed boundaries for the town and district centres. Draft Policy ED2, alongside the Proposals Maps also identifies PSAs. WYG have given consideration to the boundaries and PSAs identified within the draft Local Plan as a starting point and provided revisions where considered necessary.
- 8.35 As discussed earlier, the draft Local Plan's approach with respect to identifying Primary Shopping Areas is considered to be inappropriate with regard to satisfying the requirements of the NPPF. Draft Policy ED2 and the Proposals Maps seek to establish PSAs for town and district centres through the identification of frontages. Paragraph 23 of the NPPF stipulates that local plans should define the extent of Primary Shopping **Areas**, and as such, the identification of an area is considered to be more appropriate than the identification of frontages for this purpose.
- 8.36 To address this considered shortcoming within the draft Local Plan, WYG have proposed areas representing the PSA for each town and district centre in accordance with the definition of PSAs provided in Annex 2 of the NPPF which is as follows:

'Primary shopping area: Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage).'

- 8.37 In identifying PSAs for the town and district centres, consideration has been given as to whether individual streets and frontages possess a concentration of retail uses (A1 uses within the Use Classes Order) or services with a retail character or functionality such as high street banks.

Southport

- 8.38 For Southport, a number of changes are advised to the town centre boundary. As shown in the supporting plan, WYG consider that the Central 12 Shopping Park does not form part of the town centre and therefore should be omitted from within the town centre boundary.
- 8.39 A significant break in shopping and other main town centre uses exists on London Street. From the frontage of the Asda store at The Central 12 Shopping Park to Chapel Street is approximately 460 metres. There is in excess of a 350 metre distance from the Asda store to



the point where a continued retail frontage begins on London Street on the approach towards the main hub of shopping activity. This break in the shopping environment serves to greatly limit footfall between Chapel Street and the Central 12 Shopping Park and strengthens the sense of two separate shopping locations. Whilst it is accepted that some retail, leisure and service uses are in place along the southern end of London Street, there is not a continuous frontage and the nature and draw of the uses in place are not capable of sustaining significant activity or levels of footfall on London Street. The result of this is that the gap between Chapel Street and the Central 12 Shopping Park is not bridged to the extent that it would be consistent to incorporate the southern end of London Street or the Central 12 Shopping Park as forming part of the town centre. Additionally, with Central 12 Shopping Park having its own car park, the likelihood for users to travel to the shopping park by car and subsequently not venture into the town centre is heightened.

- 8.40 A further tightening of the town centre boundary is advised on Princes Street to omit residential properties and other non-commercial properties which are notably of a different character to the shopping area at the eastern end of this street.
- 8.41 In other areas, the town centre boundary has been widened to fully capture the extent of retail, leisure and other main town uses which contribute to the town centre's offer. At the junction of West Street and Scarisbrick Avenue the boundary has been extended to include a cluster of bars and other businesses which contribute to the evening economy. Similarly, WYG's proposed boundary extends further north along Bold Street to incorporate the full extent of the commercial frontage on this street.
- 8.42 South of Lord Street the proposed boundary has been extended along King Street to include the Prince of Wales Hotel and retail units on Portland Street. At the eastern side of the town the boundary is extended further east to the junction of Hoghton Street and Hill Street. This extension allows for a concentration of service uses on Houghton Street to be included. Many of these properties are within the financial and business services category, as well as leisure uses including the Southport Little Theatre, which together make a positive contribution to the town centre's offer. A further terrace of units occupied by retail and service businesses on the eastern side of London Street opposite the railway station car park are also included within the boundary.



- 8.43 Along Promenade and further north towards the coast, additional leisure uses are in place, many of which are reliant on tourist and visitor trade. These include hotels, amusements, the Genting Casino and Splashworld. It is not deemed necessary to extend the town centre boundary further north to incorporate these facilities. Although leisure uses are considered to represent main town centre uses and as such can play an important and positive role in the function of a town centre, these facilities are generally distanced and disconnected from the shopping environment found on Lord Street. It is considered that the character and range of uses found on Promenade is distinctly different to that of Lord Street and the town centre at large.
- 8.44 Importantly, the draft Local Plan through Policy ED7 defines the Southport Central Area which as well as incorporating the town centre area, also includes properties and land on both sides of Promenade. Through this policy, provision is provided for support to leisure, cultural and visitor attraction developments along Promenade and north of WYG's proposed town centre area. The inclusion of this policy within the draft Local Plan provides further justification for WYG's omission of this broad area from being encapsulated within the town centre boundary as the area is addressed by planning policies outside of draft Policy ED2 which relates to town centres.
- 8.45 WYG's proposed PSA for Southport relates closely to that identified within the draft Local Plan, however, an area has been defined rather than a collection of frontages. WYG's proposed PSA extends to the west along Lord Street to end at Coronation Walk. The Lord Street frontage further west of this location is considered to contain a higher proportion of leisure uses and a lower proportion of retail businesses.
- 8.46 On the south side of Lord Street, the PSA is proposed to incorporate buildings which front on to Lord Street and extended to include the Sainsbury's supermarket and three additional retail units on Hoghton Street. The inclusion of this area is considered to allow the PSA to more accurately reflect the full extent of the core retail shopping area within Southport town centre.

Bootle

- 8.47 For Bootle, the town centre boundary proposed by WYG largely corresponds with that set out within the draft Local Plan. A minor amendment to the southern boundary has been made to



omit a site situated between the Strand Shopping Centre and the canal, occupied by a car rental business.

- 8.48 At the northern end of the centre, WYG's advised boundary extends to include a terrace of shop units on the eastern side of Stanley Road to the north of Marsh Lane. These units are viewed as more appropriately marking the northern end of the centre and can be considered to form part of the town centre's shopping frontage along Stanley Road.
- 8.49 It could be argued for the town centre boundary to be extended further to include additional land to the north, south and west of the Strand where a variety of retail, commercial and community uses are in place. However, the wider surrounding locality is identified as a Mixed Use Area by Policy ED4 in the draft Local Plan and this policy, along with ED6, (Regeneration Areas) are considered to appropriately plan for development within this wider area and the diversity of uses which are to be considered suitable in the Bootle Central Area.
- 8.50 The PSA advised by WYG matches that set out within the draft Local Plan, being limited to the Strand and the frontage on Stanley Road which faces the Strand. The only minor amendment to the PSA is the removal of the Council's One Stop Shop on Stanley Road from this area.

Formby

- 8.51 For Formby, the district centre boundary as identified within the draft Local Plan is largely considered to be appropriate. An amendment has been made to omit four residential plots on the north side of Furness Avenue. Additionally, the Church of Our Lady of Compassion and other buildings associated to this church have been omitted from within the boundary, as has the residential block on the corner of Church Road and School Lane. These properties have been omitted largely as they are not considered to accommodate main town centre uses.
- 8.52 At the western end of the centre, Formby Pool has been included within the boundary. This is on reflection of the facilities strong attachment and links to the shopping environment as well as the building forming a natural end point of main town centre uses along Chapel Lane and Brows Lane.



- 8.53 Within Formby the PSA is considered to encompass retail units lining Chapel Street, Halsall Lane and School Lane. The Waitrose store has been included, which is an addition to the PSA defined in the draft Local Plan. This store has been included as it represents a key anchor store within the centre which attracts significant activity and is also relatively well connected through pedestrian links with the retail units on Chapel Lane and School Lane.

Maghull

- 8.54 The district centre boundary proposed by WYG remains largely the same as that set out within the draft Local Plan, with only minor amendments made at the fringes of the centre. At the western edge a residential block on Westway has been omitted. Similarly, at the eastern edge, a residential block to the east of Maghull Police Station has been omitted. The PSA provided seeks to continue the approach taken by the draft Local Plan in limiting this area to the retail units which together comprise the Central Square Shopping Centre and the Red Lion Centre, including the Morrisons store. The frontage found along Liverpool Road North is not included within the PSA given it is detached from the activity focused around Westway and by virtue of this street frontage providing a limited retail shopping offer.

Crosby

- 8.55 The draft town centre boundary is considered to fall short in identifying the full extent of main town centre uses along Coronation Street in the south western corner of the centre. WYG's proposed boundary extends to incorporate further retail and service uses on this street. Furthermore, additional established retail units are included within the boundary on the western side of Liverpool Road to the south of 'The By-pass'. At the eastern end of the pedestrianised section of Liverpool Road, a sizable plot is being redeveloped for retirement residential properties. It is considered appropriate for this site to be omitted from the town centre.
- 8.56 The focus of Crosby's retail offer is unquestionably centred around the pedestrianised area on Liverpool Road. It is in this area where the retail offer is most concentrated. WYG's proposed PSA encircles this area, with 'The By-pass', Richmond Road and Islington together forming a clearly defined physical boundary.

Waterloo

- 8.57 The district centre boundary for Waterloo defined within the draft Local Plan is split into two halves, the southern half focused along South Road and the northern half focused along St John's Road. WYG consider this approach to be appropriate in defining the district centre.
- 8.58 To the southern half of the centre, minor amendments are advised to incorporate units on the western side of Brighton Road to include a betting shop, public house and office accommodation. The inclusion of the Post Office on Lorne Road is also advised.
- 8.59 To the northern half of the centre, the boundary is advised to be reined back fractionally at the western extremity so as not to include unnecessary residential properties. More significantly, it is considered that the boundary should be extended to incorporate units on the eastern side of Crosby Road North. These units include the Tesco Express store and further properties immediately to the south, the majority of which provide financial and professional services and small scale office space. These units have a relationship with the existing defined town centre and are considered to play a role in contributing to the functionality and offer of the district centre.
- 8.60 The area along Crosby Road North which links to the two halves of the district centre is identified as a Mixed Use Area in the draft Local Plan through Policy ED4. This Waterloo Mixed Use Area is considered suitable for a variety of uses including office and light industry, health and education uses, civic and community uses, as well as other uses that complement the character of the area. This area presently contains a variety of town centre uses, including the Plaza Cinema and Crosby Library, although it is largely devoid of any shops. With consideration given to the character of this specific area and the planning policy position sought to be established through draft policy ED4, it is deemed appropriate for this area to not be included within the district centre boundary.

