



# Southport Town Centre Health Check Assessment

## Centre Overview

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

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

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

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

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<sup>1</sup> Visit England: GB Day Visitor Statistics 2014

<sup>2</sup> No material changes of relevance have been made to the Local Plan between the Publication Draft (January 2015) document and the Local Plan Submission (July 2015) document.

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



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

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



## Sub-Regional Shopping Hierarchy

**Table 1: The Sub-Regional Shopping Hierarchy**

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

Source: Venuescore 2014-15

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

# Southport Town Centre

## Photographs of Southport Town Centre (May 2015)



**Photograph (top left):** Entrance to Southport railway station, Chapel Street

**Photograph (top centre):** Pedestrianised area of Chapel Street

**Photograph (top right):** Wayfarers Arcade, Lord Street

**Photograph (bottom left):** Pedestrian environment, Lord Street

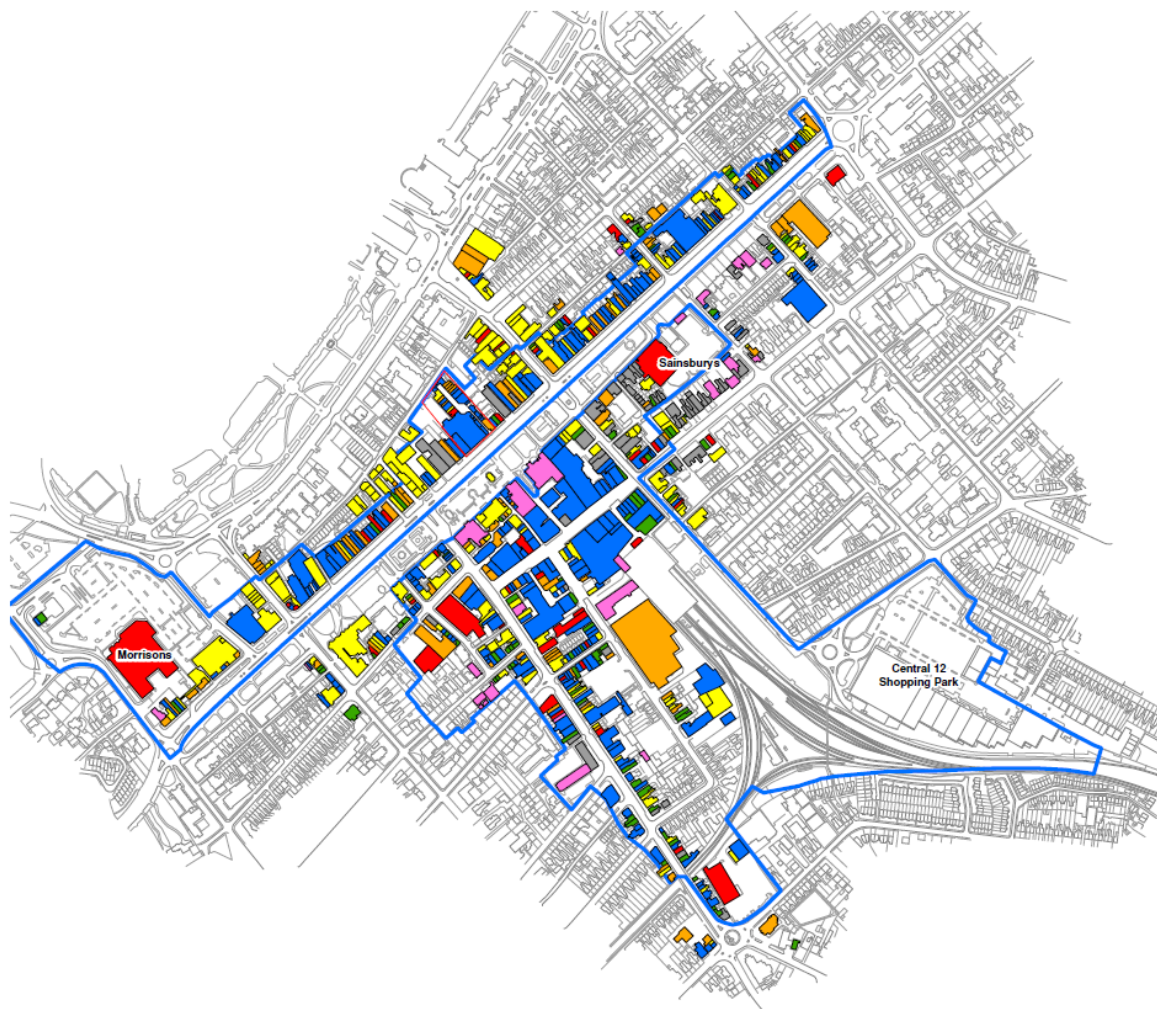
**Photograph (bottom centre):** Covered walkway of Cambridge Arcade

**Photograph (bottom right):** Bus stop and retail units, Eastbank Street

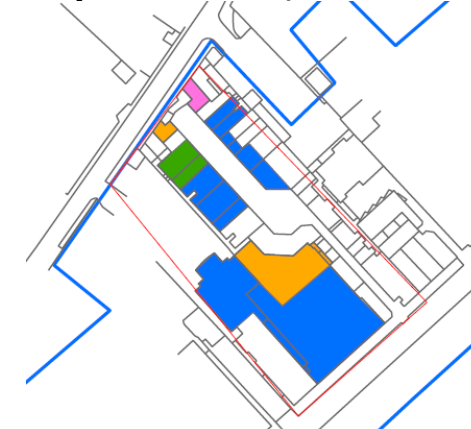


# Diversity of Main Town Centre Uses

## Diversity of Uses in Southport Town Centre (May 2015)



## Wayfarers Arcade, First Floor



### Diversity of Uses

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

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## Diversity of Main Town Centre Uses

**Table 2:** Units in Southport Town Centre at February 2010

Number of Outlets			
	No	Southport TC	UK
Convenience	48	6.3%	8.8%
Comparison	287	37.7%	34.1%
Retail Service	76	10.0%	13.1%
Leisure Services	179	23.5%	21.6%
Financial and Business Services	62	8.1%	11.1%
Vacant	110	14.4%	11.1%
<b>Total</b>	<b>762</b>	<b>100.0%</b>	<b>100.0%</b>

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

**Table 4:** Units in Southport town centre at July 2011

Number of Units			
	No.	Southport TC	UK
Convenience	50	6.6%	8.4%
Comparison	275	36.2%	33.5%
Retail Service	82	10.8%	13.2%
Leisure Service	187	24.6%	21.8%
Financial and Business Service	64	8.4%	11.0%
Vacant	102	13.4%	11.8%
<b>Total</b>	<b>760</b>	<b>100.0%</b>	<b>100.0%</b>

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

**Table 6:** Units in Southport town centre at May 2015

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

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

**Table 3:** Floorspace in Southport Town Centre at February 2010

Floorspace			
	Sq m	Southport TC	UK
Convenience	15,730	9.9%	14.3%
Comparison	56,700	35.5%	37.3%
Retail Service	9,250	5.8%	7.0%
Leisure Services	39,160	24.5%	22.7%
Financial and Business Services	11,470	7.2%	8.7%
Vacant	27,270	17.1%	9.3%
<b>Total</b>	<b>159,580</b>	<b>100.0%</b>	<b>100.0%</b>

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

**Table 5:** Floorspace in Southport town centre at July 2011

Floorspace			
	Sq.m	Southport TC	UK
Convenience	16,690	10.5%	14.3%
Comparison	58,960	37.0%	37.0%
Retail Service	9,660	6.1%	7.0%
Leisure Service	40,890	25.6%	22.8%
Financial and Business Service	11,600	7.3%	8.4%
Vacant	21,620	13.6%	9.8%
<b>Total</b>	<b>159,420</b>	<b>100.0%</b>	<b>100.0%</b>

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

**Table 7:** Floorspace in Southport town centre at May 2015

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

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

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



## Diversity of Main Town Centre Uses

### Convenience Goods Units

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

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

### Comparison Goods Units

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

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



## **Retail Services**

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

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

## **Leisure Services**

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

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

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





## Financial and Business Services

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

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

## Non-Retail Units

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

## Proportion of Vacant Street Level Property

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

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

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

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

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



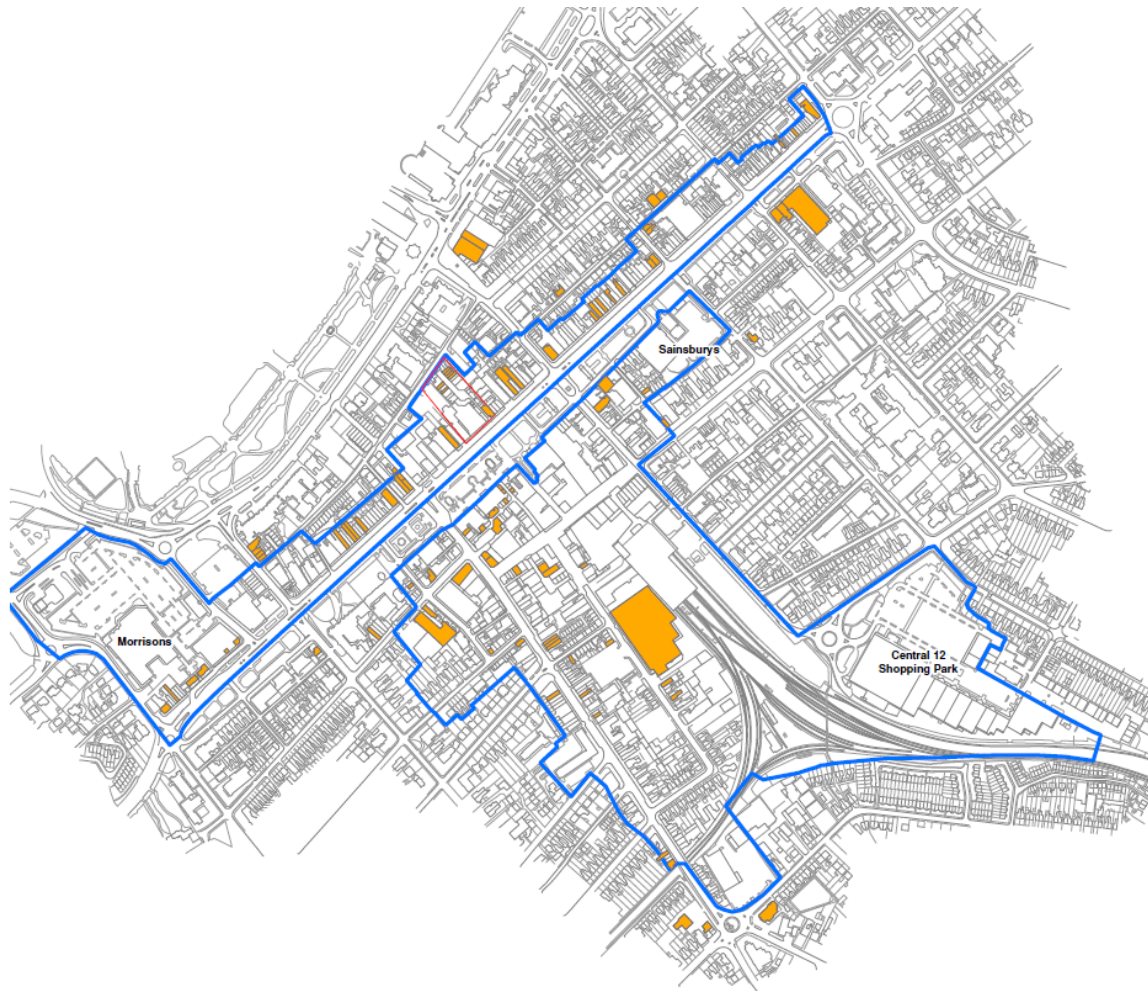
**Photograph (left):** Refurbished vacant units, Coronation Walk

**Photograph (centre):** Vacant ground floor units at Tulketh Street multi-storey car park

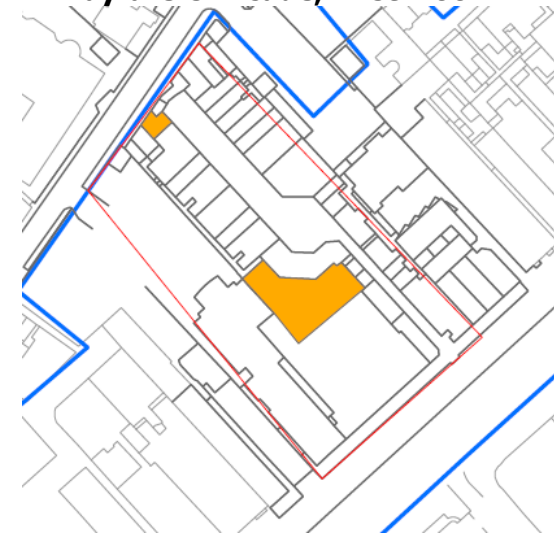
**Photograph (right):** Building under refurbishment with ground floor vacant units, King Street adjacent to Market Hall

# Proportion of Vacant Street Level Property

## Plan of vacant properties Southport town centre (May 2015)



### Wayfarers Arcade, First Floor



#### Key

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

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## Retailer Representation and Intentions to Change Representation

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

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

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

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

**Table 8:** Experian Goad list of Major Comparison Retailers

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

Source: WYG site visit, May 2015





## Market Indicators

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

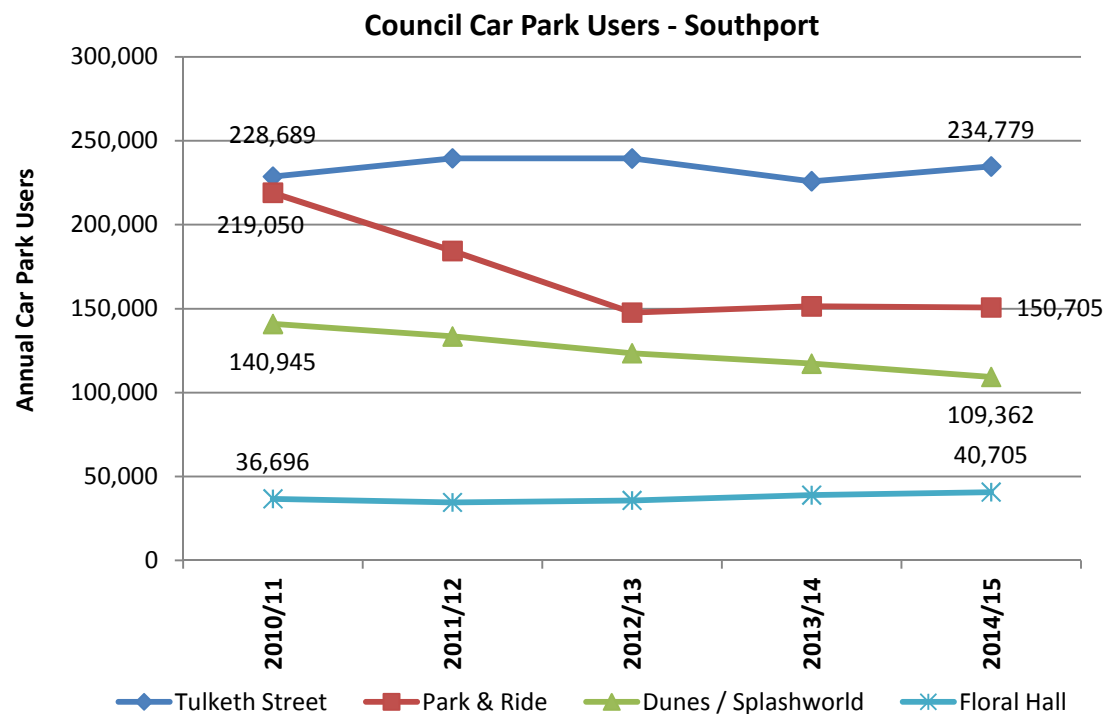
Through conversations with letting agents, it is evident that potential tenants are seeking to take short-term tenancies to test the market. Rental values have declined over recent years as a result of the challenging economic climate. This trend has been felt across the town centre, and is common to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

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

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

## Pedestrian Flows

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





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

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

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

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

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

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

## Accessibility

**Road Access:** Southport is situated on the A565 which leads to Liverpool to the south and Preston to the north. The A570 which goes through Southport leads to Ormskirk and St Helens to the south east and leads to the M58 which is found 24 kilometres to the south of the town. Traffic along the A565 and the A570 were not found to be problematic or restricting to access at the times of WYG's visits to the centre.

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

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

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

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

Based on recent similar health check surveys undertaken by WYG, we consider that the Council managed car parking charges are slightly cheaper than found at





other town centres which serve a similar shopping role, with 2 hours typically found to cost around £2.00 and 4 hours to cost between £3.50 and £4.00. Free parking is commonly available at out of centre retail parks, such as is the case at the Ocean Plaza Retail Park.

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

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

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

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

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

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



informal seating opportunities for shoppers.

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

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

## Perception of Safety and Occurrence of Crime

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

**Table 9:** Incidents of Crime, North Sefton Neighbourhood

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

Source: [www.ukcrimestats.com](http://www.ukcrimestats.com)

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



2011.

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

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

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

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



## State of Town Centre Environmental Quality

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

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

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

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

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





## Conclusions

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

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

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

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

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

A review of recent and current planning applications indicates that there are few new schemes of note planned within the town centre. However, signs of recent



investment at existing premises were observed within the centre, with a number of retail premises having been either recently renovated or in the process of being renovated at the time of WYG's visits.