Bootle Town Centre Health Check Assessment

Centre Overview

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

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

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

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

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

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

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

Sub-Regional Shopping Hierarchy

Table 1: The Sub-Regional Shopping Hierarchy

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

Source: Venuescore 2014-15

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

Bootle Town Centre

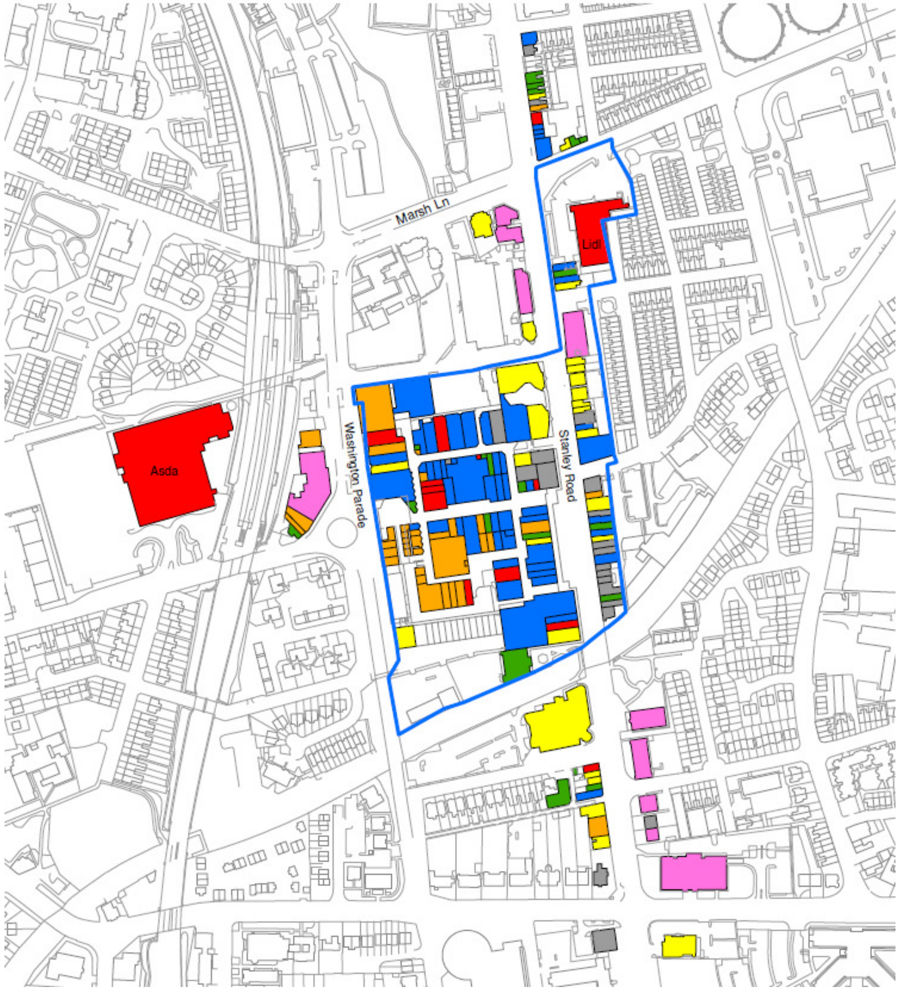
Photographs of Bootle Town Centre (May 2015)

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

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

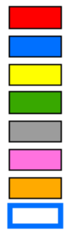
Diversity of Main Town Centre Uses

Diversity of Uses in Bootle Town Centre (May 2015)



The Strand, Lower Ground Level

Diversity of Uses



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Diversity of Main Town Centre Uses

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

	Number of Outlets		
	No	Bootle TC	UK
Convenience	22	10.5%	8.8%
Comparison	78	37.1%	34.9%
Retail Service	19	9.0%	13.0%
Leisure Services	32	15.2%	21.4%
Financial and Business Services	23	11.0%	11.3%
Vacant	36	17.1%	10.4%
Total	**210**	**100.0%**	**100.0%**

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

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

	Floorspace		
	Sq m	Bootle TC	UK
Convenience	6,250	14.2%	14.1%
Comparison	18,910	42.9%	38.2%
Retail Service	3,120	7.1%	7.0%
Leisure Services	7,410	16.8%	22.7%
Financial and Business Services	3,760	8.5%	8.8%
Vacant	4,660	10.6%	8.5%
Total	**44,110**	**100.0%**	**100.0%**

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

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

	Number of Units		
	No.	Bootle TC	UK
Convenience	21	10.0%	8.4%
Comparison	75	35.7%	33.5%
Retail Service	22	10.5%	13.2%
Leisure Service	29	13.8%	21.8%
Financial and Business Service	23	11.0%	11.0%
Vacant	40	19.0%	11.8%
Total	**210**	**100.0%**	**100.0%**

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

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

	Floorspace		
	Sq.m	Bootle TC	UK
Convenience	6,290	14.3%	14.3%
Comparison	18,370	41.7%	37.0%
Retail Service	3,220	7.3%	7.0%
Leisure Service	7,120	16.2%	22.8%
Financial and Business Service	3,800	8.6%	8.4%
Vacant	5,250	11.9%	9.8%
Total	**44,050**	**100.0%**	**100.0%**

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

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

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

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

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

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

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

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

Diversity of Main Town Centre Uses

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

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

Convenience Good Units

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

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

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

Comparison Good Units

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

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

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

Retail Services

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

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

Leisure Services

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

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

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

Financial and Business Services

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

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

Non-Retail Units

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

Proportion of Vacant Street Level Property

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

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

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

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

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

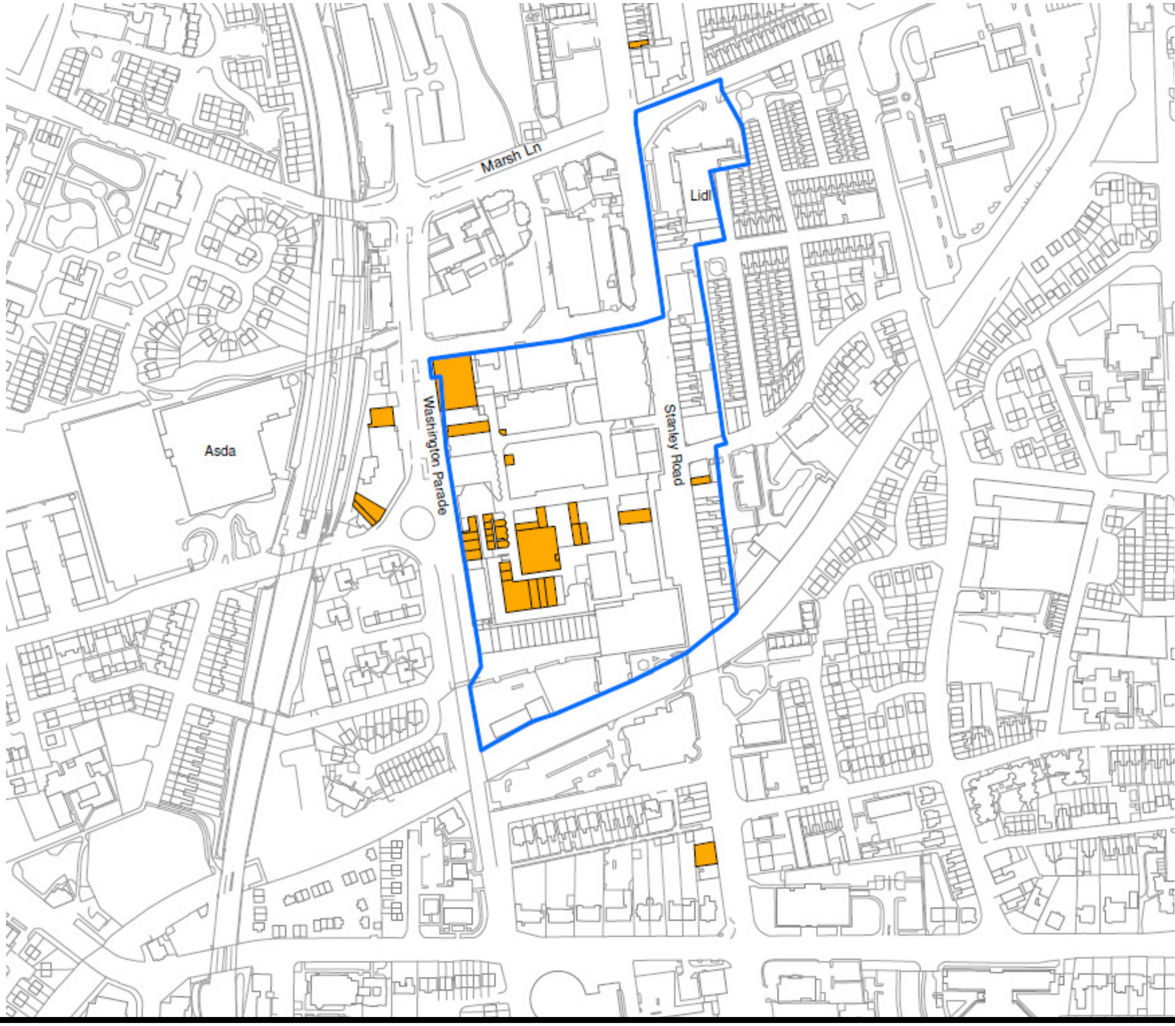
The largest vacant retail unit within the centre is the former Tesco Metro unit within the Strand, which provides 1,186 sq.m of floorspace. The second largest vacant unit is 140-147 The Strand, which was occupied by TJ Hughes at the time of WYG's 2011 survey. As mentioned, TJ Hughes are known to have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

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


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

Proportion of Vacant Street Level Property

Plan of vacant property Bootle Town Centre (May 2015)



The Strand, Lower Ground Level

Key

Vacant

Draft Policy ED2: Town Centre Boundary

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Retailer Representation and Intentions to Change Representation

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

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

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

Table 8: Experian Goad list of Major Comparison Retailers

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

Source: WYG site visit, May 2015

Market Indicators

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

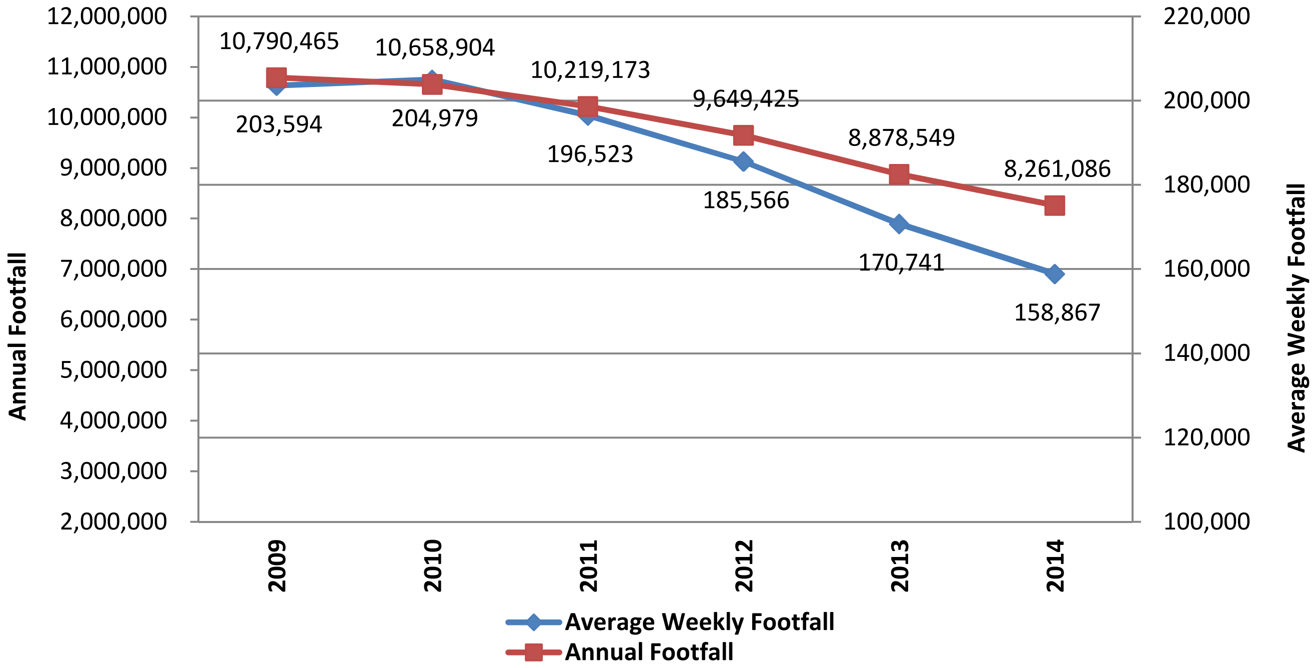
Through conversations with letting agents, it is considered that confidence levels of potential occupants is relatively weak and has not evidently improved over the last 12 months post-recession. Rental values have declined over recent years in response to the challenging wider economic climate and the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

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

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

Pedestrian Flows

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



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

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

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

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

Accessibility

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

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

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

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

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

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

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

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

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

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

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

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

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

Perception of Safety and Occurrence of Crime

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

Table 9: Incidents of Crime, South Sefton Neighbourhood

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

Source: www.ukcrimestats.com

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

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

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

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

State of Town Centre Environmental Quality

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

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

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

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

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

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

Conclusions

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

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

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

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

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

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