

Liverpool City Region

Town Centre Network and Hierarchy Review

Prepared on behalf of
Liverpool City Region Combined Authority

May 2022

A111109

Contents

- 1.0 Introduction 1**
 - 1.1 Context..... 1
 - 1.2 Methodology Adopted 1
 - 1.3 Report Structure..... 2

- 2.0 Current and Emerging Retail and Leisure Trends 3**
 - 2.1 Introduction 3
 - 2.2 Polarisation and the Decline of Secondary Centres..... 5
 - 2.3 March of the discounters..... 9
 - 2.4 Special Forms of Trading..... 11
 - 2.5 Leisure and Food and Beverage (F&B) 15

- 3.0 Retail and Leisure Audit 19**
 - 3.1 Introduction 19
 - 3.2 Liverpool City Centre..... 20
 - 3.3 Widnes 30
 - 3.4 Runcorn (Old Town) 36
 - 3.5 Halton Lea (Runcorn Shopping City) 42
 - 3.6 Huyton..... 47
 - 3.7 Kirkby 53
 - 3.8 Prescot 60
 - 3.9 Southport..... 68
 - 3.10 Bootle 74
 - 3.11 St Helens 79
 - 3.12 Earlestown 86
 - 3.13 Birkenhead..... 91
 - 3.14 Liscard (Wallasey) 99

- 3.15 Heswall105
- 3.16 Moreton109
- 3.17 West Kirby113

- 4.0 Centre Hierarchy Analysis 119**
 - 4.1 Introduction119
 - 4.2 VENUESCORE119
 - 4.3 Floorspace, Units, Retailers and Turnover123
 - 4.4 Other Factors129
 - 4.5 Conclusions132

- 5.0 Policy Recommendations 134**
 - 5.1 The Role of Spatial Plans in Defining a Network of Centres134
 - 5.2 Assessing the Spatial Pattern of Centres134
 - 5.3 Defining a Hierarchy and Network of Centres136
 - 5.4 Policy Options for the Spatial Development Strategy137

1.0 Introduction

1.1 Context

1.1.1 Tetra Tech has been appointed by the Liverpool City Region Combined Authority (LCRCA) to prepare a Town Centre Hierarchy Review (TCHR) for the Liverpool City Region. The review will inform the preparation of the City Region Spatial Development Strategy (SDS), and specifically future planning policies to define the network and hierarchy of town centres across the sub-region, in order to promote their long-term vitality and viability and future investment decisions.

1.1.2 It is important to note that this TCHR has been prepared on a desktop basis using information made available from national sources and local planning authorities within the Liverpool City Region, rather than drawing upon new empirical evidence. It is not the intention of the study to provide detailed analysis of future needs at the local level or to set strategies for individual town centres, but instead to explore the role and function of the City Region's existing town centres as part of an overall network of centres at a sub-regional level. Accordingly, the study does not replace or challenge existing retail and leisure assessments that have been prepared at the local level across the six constituent authority areas.

1.2 Methodology Adopted

1.2.1 In responding to the requirements of the consultant's brief and the advice set out within national town centre policy, Tetra Tech has adopted the following phased approach to the TCHR:

- Firstly, a review of current and emerging **retail and leisure trends** will be undertaken. This involves analysing published national research with regard to forecast trends in both the retail and leisure sectors.
- The second stage involves a brief **retail and leisure audit** of each centre, drawing upon baseline information taken from the retail evidence base

documents prepared by each of the City Region's six local planning authorities. For each of the sixteen defined town centres identified, a commentary will be provided which summarises the published health check work undertaken at a local level. This stage of work also explores whether any significant development and investment proposals are planned, which may in turn influence the centre's future attraction.

- The third stage of work involves **comparing the key characteristics** of the City Region's sixteen town centres. For example, their total floorspace, unit numbers, non-food turnover and ranking within Javelin Group's UK Shopping Venue Rankings (Venuescore). These quantitative factors will be considered alongside qualitative matters. This stage will enable us to identify and group those centres which have an equivalent role and function within the City Region – allowing for a sub-regional retail hierarchy to be developed.
- Stage four of our report seeks to bring together the findings of the study and sets out our **policy recommendations** for the SDS regarding the creation of a town centre network and hierarchy for the City Region consistent with the latest national planning policy and guidance.

1.3 Report Structure

1.3.1 Based on the adopted methodology, our report is structured as followed:

- Section 2 – Provides a review of current and emerging retail and leisure trends;
- Section 3 – Undertakes a brief quantitative and qualitative audit of each of the sixteen town centres defined within the Liverpool City Region;
- Section 4 – Compares the Key Characteristics, role and function of the defined centres; and,
- Section 5 – Provides our policy recommendations for the SDS regarding the creation of a Liverpool City Region town centre network and hierarchy.

2.0 Current and Emerging Retail and Leisure Trends

2.1 Introduction

2.1.1 The retail property landscape across the UK has evolved significantly over the past 50 years, from post-war redevelopment in town centres, through to the emergence of retail warehouse parks and out-of-town regional shopping malls. For most of this period, the retail sector has experienced considerable expenditure growth, which has been attributed to a number of factors, including greater disposable income, availability of credit, new technology and a general overall increase in our standard of living.

2.1.2 More recently, however, the UK's retail and leisure industry has experienced significant challenges, primarily due to wider economic issues related to the UK leaving the EU (Brexit) and, most recently, the coronavirus (Covid-19) pandemic. The ensuing economic shock has had a considerable impact on UK retail and leisure expenditure and shopping habits. In order to set out the wider context for the TCHR, we provide an overview of recent prevailing retail and leisure trends below.

Brexit and Covid-19 Pandemic

2.1.3 The referendum in June 2016 on the UK's membership of the European Union resulted in a majority vote to leave the EU. Generally, the short-term impact of 'Brexit' on the retail and leisure sector has perhaps been more modest than some analysts suggested but included flat retail growth; a weak Pound (£) leading to higher import and manufacturing costs, which retailers will pass onto consumers; and inflationary pressures meaning a squeeze on disposable incomes.

2.1.4 Closely, following Brexit, the subsequent outbreak of the Covid-19 pandemic and the measures to contain it, including three national lockdowns, has led to further shocks to the UK economy and various levels of restrictions on life for almost 24 months. For example, the pandemic has exacerbated Brexit related materials and

supply shortages. As a result, food, clothing and footwear sectors has seen some of the greatest inflationary rises. Inflationary pressures have meant shoppers are spending a greater proportion of their income on their groceries and have had a lesser proportion to spend on other goods.

- 2.1.5 As outlined in Experian’s Retail Planner Briefing Note¹, during the pandemic the UK economy suffered an unprecedented contraction, 600,000 fewer people were employed and over 9 million employees were furloughed. Consumer demand has suffered given social distancing and low confidence; this has led to a big drop in social consumption especially for recreation, leisure and travel. In addition, investment has fallen, as waning business confidence and deteriorating financial positions led to the postponement and cancellation of projects.
- 2.1.6 Since the height of the pandemic, Experian finds a steady recovery in services, manufacturing and construction. These have all seen the UK’s GDP rise above its pre-pandemic level as of November 2021. However, the behavioural shifts continue to weigh on economic activity moving into 2022².
- 2.1.7 Experian’s Briefing Note³ provides short, medium and long-term retail spending forecasts. In terms of consumer spending, household spending rose by 2.7% quarter on quarter in the third quarter of 2021, following the easing of public health restrictions. Spending on hospitality, travel and leisure all rose over this period. Retail, however, has experienced weaker performance over this period of easing restrictions, as consumers substituted durable goods for services.
- 2.1.8 Experian anticipates consumer incomes will continue to be squeezed as a result of inflation and cost-of-living pressures from unprecedented energy price hikes as well as food price increases. Notwithstanding the lifting of social distancing restrictions,

¹ Experian Retail Planner Briefing Note 19, January 2022

² Ibid

³ Ibid

Experian anticipates that many behavioural shifts as a result of the pandemic e.g. migration to online shopping will be permanent, and the growth seen in digital retail sales is therefore likely to persist.

2.2 Polarisation and the Decline of Secondary Centres

2.2.1 Prior to the pandemic shoppers had been increasingly prepared to travel in order to access a greater choice of shops and the type of leisure facilities which are more commonly available in larger towns and cities. As a consequence, larger retail venues (with a regional or sub-regional role) tended to perform relatively strongly, with secondary destinations (particularly those proximate to larger centres) faring less well. The trend resulted in many operators consolidating their store estate at high order centres to reduce costs, believing that they can still achieve appropriate nationwide coverage with a lesser number of stores. This trend, exacerbated by the pandemic lockdowns, and subsequent store closures which followed, has led to a dramatic increase in the supply of vacant floorspace both nationally and across the north-west region. The Centre for Retail Research ('CRR') identify in its report '*Who's Gone Bust in UK Retailing in 2019-2022*' a list of UK retailers who went into receivership between 2019 and 2022 (to date). It lists a total of 118 companies listed, with 9,059 stores and 182,487 employees affected.

2.2.2 In November 2017, high-street retailer Marks and Spencer ('M&S') set out a five-year transformation programme for the business, involving a slowdown in the Simply Food store opening programme and an acceleration of the UK store estate closure programme, with plans to grow online sales. In May 2018, M&S announced further store closures , followed by more recent announcements of additional closures in January 2019 . M&S propose to close over 100 stores in total by 2022. Those M&S stores that have already closed in Liverpool City Region in recent years include Birkenhead and New Mersey Speke (changing to a food only store) Shopping Park. Meanwhile, the retailer relocated its St Helens store from a high-street location to Ravenhead Retail Park. The wider transformation programme includes

relocations, conversions, downsizes and the introduction of concessions (including for a Metro Bank and a trail of an in-store opticians service).

- 2.2.3 In October 2018, Debenhams confirmed the proposed closure of up to 50 of its 165 stores over the next three to five years. Due to wider retail trends and the impacts of Covid-19 administrators were called April 2020. With no successful takeover offers, all remaining Debenhams stores nationwide closed in May 2021⁴.
- 2.2.4 The above are two high profile examples of the loss of long-standing operators from the UK high-street units which has resulted in a significant oversupply of retail floorspace in many town centres. This has been felt most keenly at secondary locations. Together with the loss of retail operators, fast food operators have displayed an increasing preference to incorporate 'drive thru' restaurants at out of centre locations, resulting in the closure of 'in centre' McDonald's and KFC restaurants etc in many centres. Indeed, pandemic regulations have seen a surge in drive-thru/pod Food and Beverage (F&B) demand.
- 2.2.5 Experian⁵ finds retail sales volumes have recently lagged, with volumes falling since the third lockdown in December 2021. While sales were elevated in 2021, they have since dropped, as consumers spend more in areas of the economy that had been, up to that point, locked down i.e. travel and leisure. Additionally, sales of fuel has suffered with the reinstatement work from home guidance, which has removed commuting costs for many office-workers. Signifying its relative strength, Experian finds online sales have remained high in proportional terms, despite also seeing sales volumes contract.
- 2.2.6 Colliers, in its Midsummer Retail Report, 2021, finds retail property void levels are around 15% but notes that taking into account the stores that are occupied on flexible agreements; post-CVA terms; or on a business rates-only basis then the real

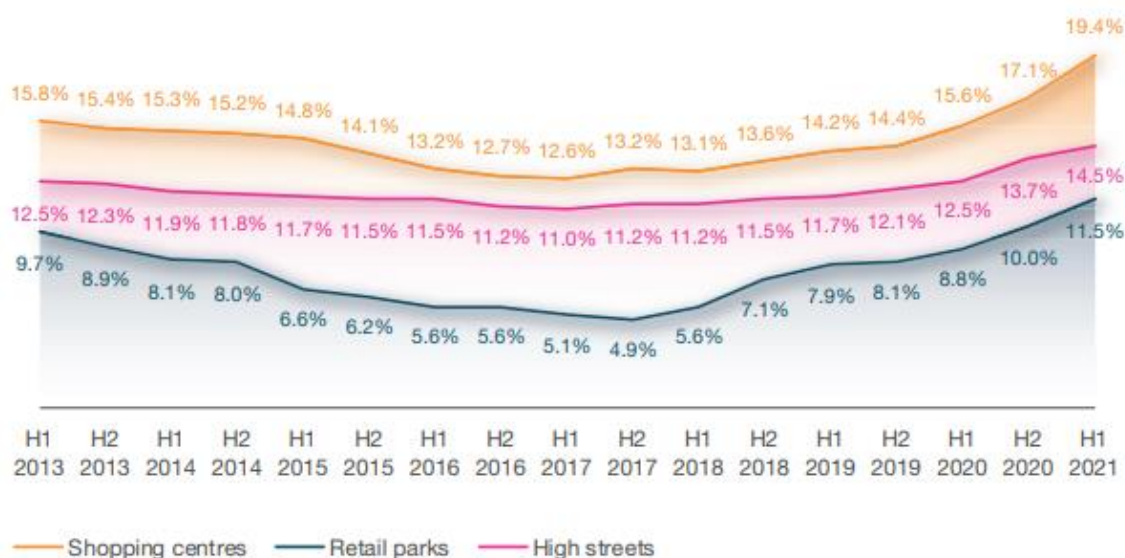
⁴ <https://www.bbc.co.uk/news/business-56993816>

⁵ Retail Planner Briefing Note 19, January 2022

void rate is likely to be double that. Colliers estimate that around one in three shops in the UK are either vacant, not income-producing or occupied on very short-term arrangements⁶. Colliers, notes that while retail park footfall remains strong, around 20% of UK shoppers have not yet reappeared across town centre shopping locations.

2.2.7 Interestingly, the Local Data Company⁷ finds shopping centres to be the location type under the most pressure, with shopping centres the most exposed to at-risk categories during the pandemic, with fashion and general clothing units making up nearly 1 in every 5 shopping centre units. The loss of significant anchor stores has also had a knock-on effect for other occupiers, causing some to vacate space in areas where footfall has taken the biggest hit.

VACANCY RATE BY LOCATION TYPE



2.2.8 Looking ahead, Experian expect spending growth over the rest of 2022 to weaken as worsening economic conditions affect consumers. It is anticipated that a tight labour market and wage growth will struggle to keep pace with inflation which will

⁶ Colliers Midsummer Retail Report, 2021

⁷ Local Data Company, Looking Beyond Lockdown H1 2021

place stress on incomes. The Bank of England expect inflation to reach over 7% in Spring 2022⁸, together with the Government's committed rise in National Insurance contributions and lifting of the Ofgem energy price cap, Experian expect cost pressures to continue to mount. Comparison goods retailing has been markedly affected by the economic shock of lockdown. There is some suggestion that both the squeeze on personal income and the Climate Change Emergency/agenda is helping to fuel behavioural shifts, particularly in the younger generations, away from "fast fashion" and an embracing of reuse/ recycling e.g. through the increasing popularity of e-tailing apps such as Vinted, Haru etc. The decline of comparison-focussed shopping on high streets has had a notable impact on the vitality and viability of many town centres.

- 2.2.9 It is evident that some secondary town centres are seeking to 'reinvent' themselves through an increased focus on quality independent and food and drink operators. Town centres are also increasingly valuing their market as a means to differentiate themselves from retail parks and superstores, and many markets are looking to contemporary and speciality retailers to create interest and draw customers in. The greatest opportunities for successful vintage, craft and food and drink markets have so far been in centres served by affluent catchments.
- 2.2.10 Against the challenging economic backdrop, while prospects for comparison goods remain weak, some product areas may buck this trend. For example, on the back of being deemed an 'essential retailer' and people resorting to home improvements to pass time during lockdown, Experian expects DIY equipment and household goods operators to continue to perform well. Moreover, convenience spending is expected to continue to perform relatively well as eating out remains subdued and significant numbers of households continue to work from home. The pandemic fuelled shift to greater spending online is expected to persist in the near term⁹.

⁸ <https://www.bankofengland.co.uk/knowledgebank/will-inflation-in-the-uk-keep-rising>

⁹ Experian Retail Planner Briefing Note 19, January 2022

2.3 March of the discounters

- 2.3.1 As highlighted in Colliers Midsummer Retail Report as 'essential' retailers during the pandemic, all food retailers benefitted from increased online and in-store sales growth. The ability of the 'Big Four' – Tesco, Sainsbury's, Asda and Morrisons – to service online demand gave them a substantial advantage over the main discounters, Aldi and Lidl. Online grocery sales saw a huge spike at the peak of the pandemic in June 2020 and in 2021 continued to track above the previous trend line. Online sales accounted for 15.4% in the four weeks to 21 February 2021, up from 8.7% during the same period last year¹⁰.
- 2.3.2 Recent economic trends have led to significant shifts in food shopping behaviour, shoppers are continuing to turn away from large food superstores, which is reflected in a small but significant challenge to the 'big four's' market share. In short, the pandemic has accelerated notable changes to food shopping habits e.g. food is now purchased more locally and more regularly. Government mandated home working has become a key driver of this behaviour and is a pattern which may persist when mandated restrictions end.
- 2.3.3 Mintel has attributed the problems which face superstores to two principal factors. Firstly, many young people are choosing to rent within or close to town and city centres. As a consequence, many undertake sporadic food shopping and often eat out, use takeaways, apps such as or buy instant meals via apps such as Just Eat/Deliveroo. Accordingly, when young people undertake food shopping, they often have no greater need than that which can be serviced by a top-up store.
- 2.3.4 The second factor is the growth of Limited Assortment Discounters (LADs), which have become more mainstream in respect of both their offer and their market positioning. Mintel suggests that the improvements in discounters' offer, such as wider ranges, better fresh foods and more premium foods, means that they have

¹⁰ Colliers Midsummer Retail Report, 2021

become an attractive alternative to both large food superstores and to convenience stores.

- 2.3.5 Colliers suggest that there are some positives to be taken from the high levels of retail closures, insofar as they have provided opportunities for others to take on space. While some centres have been re-occupied by household variety discounters such as B&M Bargains, and Home Bargains, the rise of the LADs such as Aldi and Lidl is expected to continue apace. The UK's squeeze on personal income has driven the sustained increase in popularity of these discounters.

Table: Market Share of Key UK Food Retailers 2017-2022

Operator	2017	2018	2019	2020	2021	2022
Tesco	28.1	27.9	27.7	27.3	27.3	27.9
Sainsbury's	16.5	16.3	15.9	15.8	15.7	15.6
Asda	15.6	15.5	15.3	14.9	14.6	14.4
Morrisons	10.9	10.8	10.6	10.3	10.4	9.9
Aldi	6.2	7	7.5	7.9	7.4	7.8
Co-op Food	6	5.8	5.9	6	6	5.7
Lidl	4.5	5	5.3	5.9	5.9	6.2
Waitrose	5.3	5.2	5.1	5	5	5.1
Iceland	2.3	2.3	2.3	2.3	2.5	2.4

Source: Statista.com 2022, all figures January of each year.

- 2.3.6 While the 'Big Four' have been circumspect in respect of new store openings, the above table shows all four have suffered declining market share with the main beneficiaries being Aldi and Lidl.
- 2.3.7 In response to this competition the Big Four has adopted a reconfiguration and refurbishment strategy as well as continuing to introduce concessions into their stores to help generate footfall. In some cases, product lines and pricing are being reduced.
- 2.3.8 Both Aldi and Lidl however, have adopted ambitious roll out strategies as they strive to shore up large gains in market share. In November 2021 Lidl announced its

latest expansion plans which will see it aim to reach 1,100 stores in Britain by the end of 2025. The retailer currently has more than 880 stores plus 13 distribution centres in Britain, employing more than 26,000 people¹¹. Rival Aldi, which made reported revenues of £13.5 billion in the UK and Ireland in 2020, has around 940 UK stores with ambitions to reach 1,200 by 2025.

- 2.3.9 Together with Lidl, Aldi the online retail giant, Amazon, a new entrant to the UK's food retail market, also intends to scale up its retail presence on the UK High Street. In November 2021, Amazon opened its eighth London grocery store as it continues to invest in physical sites. Amazon has recently made significant moves into the UK physical shop space, with a total of eight Amazon Fresh convenience stores, plus two '4-star' general stores. It is tipped for further expansion¹².

2.4 Special Forms of Trading

- 2.4.1 Colliers¹³ finds that despite some signs of recovery, footfall across all UK retail environments is still down. In May 2021, it was down by 27.5% compared to the same period in 2019. The reopening of international tourism is expected to help, but structural change in retail distribution is expected to continue to impact.
- 2.4.2 Experian¹⁴ highlights that there has been a marked increase in special forms of trading (non-store sales), most notably online shopping, since the Covid-19 crisis broke, further accelerating the already strong growth trend seen over the past decade. Experian finds this has lifted the share of special forms of trading (SFT) to a peak of over 30% of total retail sales at the height of the November 2020 lockdown.

¹¹ <https://news.sky.com/story/lidl-says-it-will-create-4-000-jobs-as-store-numbers-rise-to-1-100-by-end-of-2025-12477157#:~:text=Lidl%20has%20announced%20its%20latest,the%20creation%20of%204%2C000%20jobs.>

¹² <https://www.standard.co.uk/business/leisure-retail/amazon-till-free-grocery-store-opening-central-london-high-holborn-b967938.html>

¹³ Colliers Midsummer Retail Report, 2021

¹⁴ Experian Retail Planner Briefing Note 19, January 2022

- 2.4.3 The Office for National Statistics (ONS) collects data for SFT, comprising sales via the internet, mail order, stalls and markets, door-to-door and telephone sales. Online sales by supermarkets, department stores and catalogue companies are all included. The rising share of internet sales in total retail transactions is the key trend for SFT. Internet sales' share of total retail surpassed 20% in 2019, rising to around 28% in 2020, against less than 5% in 2008. The value of internet sales in 2021 is estimated at £121.7bn in current prices¹⁵.
- 2.4.4 With lockdown measures related to Covid-19 progressively easing through 2021, Experian finds the share of internet sales in total retail transactions eased from its peak but remains elevated. Experian anticipates there will still be some unwinding of this trend, however, increase in the internet sales seen during the pandemic is expected to remain as consumers have become more accustomed to online shopping during lockdown. Faster delivery times, and easier returns processes have also encouraged this trend. The expansion of 5G and fibre networks should ensure this momentum is maintained.
- 2.4.5 Colliers¹⁶ find that since the pandemic began, non-store sales volumes have increased by 53%. Online market share of all UK retail sales grew from 19% in February 2020, peaked at around 36% in January 2021, and fell back to under 30% in April 2021. Colliers suggest this is unlikely to fall below 25% as trading conditions become more normalised. It notes that while streets may have been unusually quiet during lockdown, roads have seen a growing level of traffic serving online retailing and delivery.
- 2.4.6 In response to this shift, there has been significant investment in e-commerce and distribution systems. Colliers estimates that by 2024, another 50 million sq ft of distribution space will be required to service e-commerce. In contrast, it is estimated that 40% of retail shop floorspace may be surplus to requirements. By some

¹⁵ Ibid

¹⁶ Colliers Midsummer Report, 2021

estimates this amounts to around 450 million sq ft. E-commerce distribution space is becoming a measurable portion of the UK's spatial retail offer.

- 2.4.7 The continued popularity of special forms of trading can be seen as both a threat and an opportunity to 'bricks and mortar' retailing. Retailer's physical stores and websites now often have a 'symbiotic' relationship with many operators offering a 'clicks and bricks' strategy.
- 2.4.8 Many stores sell online but source sales from regular stores rather than warehouses, implying an increase in required store floorspace to cater for rising internet sales. This is acknowledged by Experian which provides adjusted market share figures for special forms of trading in order to reflect sales via stores¹⁷. Click-and-collect is an increasingly popular choice with consumers. Since this requires a bricks-and-mortar presence in easily accessible locations, Experian observes that this is largely space demand neutral. However, home delivery with the goods delivered sourced from warehouses is not space demand neutral in the way that click-and-collect is, which, Experian warns, presents a major potential threat to future demand for retail floorspace on the high street.
- 2.4.9 SFT market share is expected to continue to grow strongly in the mid-term, hitting above 30% in 2025, with the pace of e-commerce growth anticipated to moderate over the longer term¹⁸.
- 2.4.10 The figures below present visually the change in non-store retail sales for both convenience and comparison goods since 2010, peaking during the pandemic, and the predicted change up to 2030.

¹⁷ Experian Retail Planner Briefing Note 19, January 2022

¹⁸ Ibid



Figure: Convenience Non-Store Retail Sales (Experian, January 2022)



Figure: Comparison Non-Store Retail Sales (Experian, January 2022)

2.4.11 Online shopping can drive demand for traditional outlets. Bricks-and-mortar stores act as a showroom for products, a service location and collection/drop-off points for online orders. In-store product and services offer forms part of a co-ordinated multi-

channel strategy and Experian see this continuing to support demand for retail space¹⁹.

2.4.12 Such shopping habits can drive visits/footfall to local town centres, where visitors typically stay for leisure.

2.5 Leisure and Food and Beverage (F&B)

2.5.1 The relative 'retreat' of retail from the high street has to some extent been followed by a growth in the number and diversity of leisure uses in centres. In particular, prior to the pandemic, health and fitness had been a key growth sector, which has seen numerous entrants to the market benefitting from the increased opportunities the higher vacancy rate brings.

2.5.2 With the rising profile of social media over the past decade, there has been a greatly increased focus on how people look. This has contributed to a steady increase in health and beauty retailers' sales as a proportion of all retail sales during the past five years²⁰. This trend of diversification towards leisure and services in centres is expected to continue.

2.5.3 Pre-pandemic the health and fitness sector had been buoyed by the popularity of budget gyms. Operators such as Pure Gym, the Gym Group, and easyGym have an operational model which is based on low costs and high volume. Such gyms tend to have plenty of equipment in order to encourage use but are characterised by basic fit-outs and limited staff. Many budget gym operators – including Pure Gym and the Gym Group – are actively seeking to bring forward additional facilities, with a wide range of properties (including old theatres, larger shop units and office space) having the potential to meet their needs. The Leisure Database Company suggest around one in every seven Britons has a gym membership. Post pandemic the gym

¹⁹ Ibid

²⁰ Mintel UK Retail Rankings, April 2020

sector is expected to continue to perform well, with personal health and wellbeing now at the forefront of people's minds.

- 2.5.4 The Local Data Company finds that the fast food and food delivery category has been boosted by the growth in delivery, driven by the closure of the casual dining sector. This has driven many take-away brands to expand their estate in order to reach more homes and capitalise on favourable trading conditions and increased demand. The challenge will be to see how the reopening of the casual dining sector impacts these businesses, or whether lockdown habits remain.
- 2.5.5 Colliers²¹ suggest retail is now a leisure activity. Many large foodstores include concessions e.g. coffee shops etc and are becoming shopping/leisure destinations. The lines between food retailing and leisure are blurring. In the leisure sector, operators show increased appetite for larger floorplates to launch more experiential concepts. As shopping environments open up across the country. Colliers has reported encouraging activity in the retail and F&B markets that serve the wider North-West region, with increased enquiries from retailers, leisure and F&B operators in Manchester and the North West.
- 2.5.6 Colliers finds the key factor for all retail and leisure assets are re-based values and the potential to convert and redevelop to create a mix of uses. The repurposing trend is gathering pace with older, large stores no longer suitable or today's omni-channel retailers but ideal for leisure operators who need to be able to accommodate a large number of customers.²²
- 2.5.7 There are now an increasing number of emerging leisure concepts which help to anchor retail environments, including bowling alleys, indoor 'ninja' style activity centres, trampolining and crazy golf. It is believed these concepts can assist centres in providing a point of difference with the competition, ensure that visitors' dwell

²¹ Colliers Midsummer Retail Report 2021

²² Ibid

times are increased, and assist a town's evening economy. Large scale repurposing projects are anticipated to have the desired effect of reducing the retail stock and delivering interesting new non-retail uses²³.

Use Class E - Permitted Development Rights

- 2.5.8 Recent change to the Use Classes Order in England is part of the Government's response to the pandemic, in recognition that business, retail and hospitality premises need to be able to respond quickly to the resulting changes in the way we live our lives.
- 2.5.9 Seen as one of the most impactful planning reforms in decades, has been the consolidation of a number of separate Use Classes under a single 'Commercial, Business and Service' Class E. This update to the Town and Country Planning (Use Classes) Order 1987 (the 'UCO') came into effect in September 2020 and combined shops, restaurants, offices, gyms and nurseries (amongst others) that no longer require planning permission to switch uses.
- 2.5.10 Shops (A1), financial/professional services (A2), cafés/restaurants (A3), indoor sports/fitness (D2 part), medical health facilities (D1 part), creche/nurseries and office/business uses (B1) have been subsumed into a new single Use Class E.
- 2.5.11 Many development plans have sought to prevent the decline of Class A1 shop uses in town centres by restricting changes of use. The new approach aims to promote the vitality and viability of town centres by allowing more diversification in a way that can respond to rapid changes in the retail and leisure sectors.
- 2.5.12 These new rights have proved to be somewhat controversial with many local planning authorities highly concerned at the loss of control across their local high streets; while others see Use Class E as helping to pave the way for further repositioning of assets for alternative use.

²³ Ibid

- 2.5.13 The increased flexibility has been welcomed by many landlords and fund managers with vacant premises. For example, a property could operate as a shop during the day and a restaurant or a gym in the evening. However, local planning authorities will now need to re-think their policy/strategies for town centres, with less emphasis on retail as the key attraction.
- 2.5.14 Other changes introduce more restrictions rather than flexibility. Partly in response to the impact of pandemic, there is now added protection against the loss of learning, non-residential and community facilities, including museums public halls and local shops. These uses are now included in new Classes F1 and F2. Other potential 'bad neighbour' town centre uses have been placed in the list of sui generis uses, with no permitted changes of use e.g. pubs/bars (A4), takeaways (A5), cinemas and live music venues.
- 2.5.15 Most recently, in March 2021, an update was made to the General Permitted Development (England) Order 2015 (the 'GPDO') to allow for the change of use of these Class E properties to residential from August 2021 (extending a right that had previously been restricted to office uses), subject to certain criteria and limitations. Article 4 directions (under article 4 of the GPDO), can, in limited circumstances, allow for councils to withdraw permitted development rights from defined areas, albeit they require stringent justification must "apply to the smallest geographical area possible".
- 2.5.16 The Government sees this as a means of high street revitalisation while playing a role in providing new homes, believing that these rights deliver additional houses at highly sustainable locations that may not otherwise have been brought forward.
- 2.5.17 It seems the new Class E has enormous potential to help bring about the recovery of high streets as it gives businesses a significant amount of flexibility. However, this leap is not without risk, and has wide ranging implications for local authority plan-making and strategies for development.

3.0 Retail and Leisure Audit

3.1 Introduction

3.1.1 This section of the TCHR sets out an audit and review of the sixteen centres of 'town centre' classification or above which are identified in the emerging and adopted development plans of the six local authorities that comprise the Liverpool City Region. These town centres include:

- Liverpool City Centre (Liverpool City Council);
- Widnes Town Centre (Halton Borough Council);
- Runcorn Town Centre (Halton Borough Council);
- Halton Lea Town Centre (Halton Borough Council);
- Huyton Town Centre (Knowsley Council);
- Kirkby Town Centre (Knowsley Council);
- Prescott Town Centre (Knowsley Council);
- Southport Town Centre (Sefton Council);
- Bootle Town Centre (Sefton Council);
- St Helens Town Centre (St Helens Council);
- Earlestown Town Centre (St Helens Council);
- Birkenhead Town Centre (Wirral Council);
- Liscard (Wallasey) Town Centre (Wirral Council);
- Heswall Town Centre (Wirral Council);
- Moreton Town Centre (Wirral Council); and
- West Kirby Town Centre (Wirral Council).

3.1.2 The town centre audits have been undertaken on a desktop basis, drawing upon nationally available data, retail studies, town centre strategies, and other evidence base work which has been prepared at a local level by the respective local planning authorities. No new empirical evidence has been prepared and, accordingly, the TCHR does not seek to replace or challenge any City Region authority's existing retail and leisure evidence base.

- 3.1.3 Our methodological approach to the audit of each town centre has involved: a general description of its characteristics and offer, an overview of estimated total floorspace, how this is broadly split between different uses, the estimated number of units in the centre, its vacancy rate, and any observations on accessibility and environmental quality. The audits also examine whether there are any strategies in place to shape the respective centre's future growth and if there are any pending developments that might change its future role and function.
- 3.1.4 Finally, we have drawn upon Javelin Group's 'VENUESCORE' database. This ranks all of the UK's town centres based on a set methodology and is an important tool in understanding the retail hierarchy at a regional and sub-regional level. Javelin Group's methodology essentially involves an evaluation of each centre in terms of its provision of multiple retailers (including anchor stores, fashion operators, and non-fashion multiples) – to which a score is attributed. In addition to this score, each location is assessed in terms of a range of other attributes, including: market positioning, age focus, fashion focus, fashionability, foodservice bias and anchor strength.

3.2 Liverpool City Centre

Characteristics and Offer

- 3.2.1 Liverpool City Centre is a historic metropolitan city centre which provides an extensive retail, leisure, civic and cultural offer and serves a core catchment area of the Liverpool City Region, alongside parts of Lancashire, Cheshire and North Wales. The centre can also be regarded as a tourist destination of national (and arguably international) significance, and hence also benefits from a significant inflow of visitors on an annual basis from beyond this core catchment.
- 3.2.2 The main focus for retailing in the city centre is the 1.6 million square foot (sq.ft) Liverpool ONE, which was completed in 2009 and has created a vibrant, high-quality shopping and leisure destination – encompassing over 170 shops, bars and

restaurants. This development has reaffirmed Liverpool's position as one of the top comparison goods shopping destinations in the UK, and has also played an important role in reconnecting the retail core of Liverpool City Centre to the waterfront.

3.2.3 Alongside Liverpool One, the city centre's core retail offer can be found along the pedestrianised Church Street, Parker Street and Bold Street. The centre also has three purpose-built shopping malls: the St John's Centre, Clayton Square Shopping Mall and the Metquarter. A large indoor market is located within the St John's Centre and was the subject of a £2.5m refurbishment in 2016.

3.2.4 In addition to its retail offer, Liverpool has a number of tourist attractions located within and immediately surrounding the City Centre including the two cathedrals, the Kings Dock arena and convention centre (ACC Liverpool), the Walker and Tate Art Galleries, several museums and the Albert Dock. The centre has numerous theatres (Empire, Playhouse, Royal Court, Epstein, Everyman, etc.), music venues (Philharmonic Hall, Academy, Cavern Club, Olympia, etc.) and three cinemas (Odeon, Everyman and the independent Picturehouse at FACT). Like all of the UK's major cities, there are also a wide variety of restaurants, bars, casinos, nightclubs and other leisure activities within the central area – resulting in a thriving evening economy.

Diversity of Use

3.2.5 Turning to the composition of Liverpool City Centre, analysis undertaken as part of Liverpool's latest Retail Study (2016) identified that the city centre contained a total of 1,022 units, equating to some 321,453 sq.m (GIA) of floorspace. Table 3.1 shows the proportional split of outlets and floorspace in percentage terms across retail, leisure and commercial sectors. It also identifies the centre's vacancy rate, as recorded at the time of the 2016 study.

Table 3.1 – Diversity of Use: Liverpool City Centre

Use	Percentage of Outlets	Percentage of Floorspace
Convenience Retailing	5.4%	6.1%
Comparison Retailing	38.3%	47.1%
Retail Service	6.6%	3.2%
Leisure Service	32.2%	31.4%
Financial and Business Services	3.3%	2.3%
Vacant	14.2%	10.0%
Total	100%	100%

Source: Liverpool Retail Study 2016.

- 3.2.6 The diversity of use analysis identified that comparison goods retailing was the dominant sector in Liverpool City centre at the time of the survey work, equating to 38.3% of units and 47.1% of floorspace. This was significantly above the national averages at the time of 32.5% (outlets) and 36.2% (floorspace) respectively – these national averages remain broadly equivalent today. The strength of the centre’s comparison goods offer is an important indicator of its role and function as a regional shopping destination.
- 3.2.7 Also notable was the proportion of floorspace (31.4%) and outlets (32.3%) within the City Centre that were devoted to leisure uses. This compared favourably to the national averages of 23.2% (floorspace) and 22.4% (units) and, again, indicates that the centre functions as an important leisure destination which serves an extensive catchment area.
- 3.2.8 Conversely, the diversity of use analysis undertaken as part of the 2016 Retail Study highlighted a lower than average number of convenience retail outlets (5.4%) and floorspace (6.1%). Financial and business services were also below the national average. Such uses would be more prevalent in centres which serve day-to-day needs, and this reinforces the notion that Liverpool City Centre is predominately used as a higher-order comparison goods shopping and leisure destination.

Retailer and Leisure Representation

- 3.2.9 The 2016 Retail Study identified that there were 440 national multiple retailers in Liverpool City Centre, occupying some 199,912sqm (GIA) of floorspace. Of these some 240 were comparison goods retailers and this includes major retailers such as: John Lewis, Debenhams, M&S, Superdry, Apple, Urban Outfitters, Arcadia Group, Hollister, GAP and many others.
- 3.2.10 The Retail Study also found that Liverpool City Centre had 30 national multiple convenience goods retailers present, and 120 multiples in the leisure service sector. This includes restaurants and cafés such as Pizza Express, Costa Coffee, Starbucks, Byron Burger, KFC and McDonalds, alongside many others.
- 3.2.11 Experian Goad publishes an annual list of the top national-multiple comparison goods retailers²⁴. At the time of writing this report the November 2020 edition remains the most up to date list even though it is acknowledged that some of the retailers no longer exist. This includes Debenhams, Burton, Dorothy Perkins, Topshop, Topman and Monsoon Accessorize.
- 3.2.12 The remaining top national-multiple comparison goods retailers act as ‘anchor’ tenants within town centres, adding to their overall appeal and driving pedestrian footfall. The list can, to some extent, be regarded as a barometer of a centre’s overall attraction, with the largest and most successful centres more likely to accommodate the top national multiples. In Liverpool City Centre’s case, it is significant that it is home to all but one of the remaining top 28 comparison goods retailers, including John Lewis, Primark and M&S. This emphasises the centre’s strength of attraction as a comparison goods shopping destination.

²⁴ The list of retailers includes: Debenhams, Burton, House of Fraser, Dorothy Perkins, John Lewis, H & M, Marks & Spencer, Monsoon Accessorize, New Look, Next, Primark, Argos, River Island, Boots, Topman, T K Maxx, Topshop, W H Smith, Wilkinson, Carphone Warehouse, Clarks, Clintons, EE, HMV, O2, Superdrug, Vodafone and Waterstones.

Vacancies

3.2.13 With regards street level vacancies, the 2016 Retail Study found that the level of vacant floorspace recorded in Liverpool (10%) was at broadly UK average levels. Whilst the proportion of vacant units was marginally above the national average (11.4%), the Retail Study's authors did not consider this to be a concern or a threat to the centre's long-term vitality and viability.

Accessibility

3.2.14 The 2016 Retail Study confirms that Liverpool City Centre is highly accessible by various modes of sustainable transport – as would be expected of any major city. There are two major railway stations within the city centre. The largest of these is Lime Street (located on the eastern side of the centre), which provides services to London, Birmingham and other major stations across the country, as well as local stopping services.

3.2.15 Liverpool Central Station is located to the south of Lime Street and provides more local service to destinations such as Chester and Southport. There is a large bus interchange located at Liverpool One which provides national services across the country. A further bus station is located at Queen Square and offers services within the Liverpool City Region area. The city centre is understood to benefit from some 6,000 car parking spaces within multi-storey facilities, whilst there are also numerous temporary surface car parking facilities available.

3.2.16 There is also a frequent ferry service between Pier Head with Woodside in Birkenhead

3.2.17 In summary, Liverpool City Centre can be regarded as highly accessible to a sizable catchment area via a wide range of sustainable transport modes, including rail, bus, private car and on foot.

Environmental Quality

- 3.2.18 In terms of environmental quality, the 2016 Retail Study found that this varies throughout the city centre, with Liverpool One setting a high standard for the surrounding area. It noted that the city centre contains Chavasse Park, a large public park set within Liverpool One, and that this represents a significant amount of green space for a city centre location.
- 3.2.19 The Study notes that the public realm around St Johns and Clayton Square has been the subject of a £3.5m upgrade (2016), and that the Rope Walks area of the city centre represents an attractive, bohemian neighbourhood which boasts a strong day and night time economy. Finally, it is highlighted that investment at Liverpool Lime Street Station has improved the main arrival point into the city centre, but that routes from this to the main shopping areas and tourist attractions could benefit from public realm improvements.
- 3.2.20 Overall, it is considered that Liverpool City Centre is an attractive and compact city centre which benefits from a mix of impressive historic buildings and more modern commercial developments, such as Liverpool One. The public realm is generally of a good quality and the main challenge appears to be improving this in the vicinity of Liverpool Central and along some of the other more peripheral routes which serve the centre's retail core.

VENUESCORE

- 3.2.21 Javelin Group's VENUESCORE database ranks all of the UK's town centres based on a set methodology, which includes an evaluation of each centre's multiple retailers and a range of other key attributes. It represents an important tool in understanding the retail hierarchy at a regional and sub-regional level.
- 3.2.22 In the case of Liverpool, it is noted that the latest VENUESCORE data (2016/17) places the City Centre as the fifth strongest individual shopping centre in the UK,

behind only Manchester, Birmingham, Leeds and Glasgow. The centre has retained this position over the past few iterations of the database. This represents further evidence that Liverpool is a shopping and leisure destination of national significance, which benefits from an extensive primary catchment area and strong levels of tourism inflow from beyond this.

Council Strategies and Emerging Schemes

- 3.2.23 There are a number of council strategies, policy documents and emerging schemes that need to be considered, as these will ultimately deliver development that will further enhance the attraction of Liverpool City Centre.
- 3.2.24 The Liverpool Local Plan, adopted in January 2022, provides the framework to guide development in the city up to 2033. Section six of the Local Plan sets out a vision for Liverpool City Centre, highlighting the ambition for it to be a thriving regional centre for economic, retail, leisure, tourist and cultural uses.
- 3.2.25 The plan seeks to achieve this by splitting the city centre into numerous 'character areas', including the: Main Office Area, Pumpfields, The Knowledge Quarter, The Main Retail Area, The Waterfront and its Fringes, The Creative Quarter (which includes the Ropewalks / Baltic Triangle), The Cultural Quarter and the St Georges Quarter. Policy priorities have been set for each of these areas within the Local Plan, for example: Pumpfields will be brought forward for comprehensive mixed-use development; The Main Retail Area will remain the primary focus for major comparison goods retailing; The Waterfront and its Fringes will be brought forward for mixed-use development, with a focus on the tourism offer and leisure economy; and, the Creative Quarter will be expanded through further investment in both the Ropewalks and Baltic Triangle areas.
- 3.2.26 Alongside the Local Plan, there are also a number of Spatial Regeneration Frameworks (SRFs) relating to the parts of the City Centre which have been adopted to guide future development. For example, the Paddington Village area of the City's

Knowledge Quarter was the subject of a Spatial Regeneration Framework prepared in February 2017. This sets a vision for the area, which includes: the creation of a centre of clinical excellence for the Royal College of Physicians, provision of new education and learning centres, new modern business and research space, the creation of a new residential neighbourhood, and a new urban park.

- 3.2.27 Meanwhile, a SRF has also been produced and adopted (February 2018) for a former dockyard area of the city's waterfront, immediately north of the city centre. Known as 'Ten Streets', the framework paves the way for a transformational regeneration project which will deliver some one million square feet of new employment, residential, and leisure development. This will take the form of new development plots and the repurposing of retained buildings – many of which are historic in character. The area will be complemented by new hard and soft landscaping in the form of pocket parks and public squares.
- 3.2.28 The Cavern Quarter & Williamson Square SRF is currently in draft format and dated January 2020. The document will guide and shape future development and investment and support regeneration within the SRF area, and includes strategies for music and art, tourism, heritage, connectivity, public realm and mix of uses.
- 3.2.29 We are also aware the Council are preparing a Public Realm Strategy and a Masterplan for St Georges Gateway and will be consulting on this in due course.
- 3.2.30 Alongside these adopted SRF's, there are also Council endorsed 'Development Frameworks' for other parts of the city centre, which set out design and development principles. For example, the 38-hectare Baltic Triangle area benefits from such a framework which, amongst other things, seeks to support and encourage further investment in the area's creative and digital industries, and bring derelict land, vacant and underused buildings back into beneficial use. A Development Framework has also been produced for the Pumpfields area of the city centre. Its purpose is to respond to increasing demand for residential development

in what is an area currently designated for employment uses. The document supports the diversification of land uses in Pumpfields, including residential, employment and educational uses; and identifies the potential for longer term residential led mixed-use areas.

- 3.2.31 In addition to these strategy documents, there are also a number of forthcoming schemes of note within and immediately surrounding the City Centre that will influence its future attraction. For example, the Liverpool Waters scheme will see 60 hectares of historic dockland immediately north of Liverpool's Commercial Business District redeveloped to provide 1.5 million square metres of new residential led, mixed-use development over a 30-year period. Permission has subsequently been granted for a number of new residential tower blocks within this dockland area over the past few years, some of which are now under construction. Clearly the scale of development proposed as part of Liverpool Waters has the potential to have a transformative effect not just upon Liverpool's waterfront also upon the city centre as a whole.
- 3.2.32 Also of note is Liverpool's new cruise liner terminal, which was granted planning permission in early 2018 and also includes an adjoining hotel and multi-storey car park. Construction is currently underway and is anticipated to be completed by 2023. The new facility will enable the world's largest cruise ships to dock at Liverpool and will inevitably have a significant positive impact upon visitor numbers – thus benefiting surrounding business sectors through spin-off trade.
- 3.2.33 Finally, Everton Football Club has acquired land at Bramley Moore Dock, to the north of Liverpool city centre, for a proposed new 58,000-seater stadium. The new stadium commenced construction in August 2021 and anticipated to be completed by 2025. The project intends to act as a regeneration catalyst for the Liverpool Waters project, and is recognised as the largest single-site private sector development in the country. Upon its completion, the stadium will significantly contribute to the local, regional and national economy, create and act as a magnet

for new jobs and act as a significant leisure draw within walking distance of the city centre's existing food and beverage offer, further boosting the attraction of and tourism offer of Liverpool.

Conclusion

- 3.2.34 In conclusion, the above audit - which is based on the findings of the latest Liverpool Retail Study - has established that Liverpool City Centre contains in excess of 1,000 individual units, equating to more than 320,000 sq.m (GIA) of floorspace. This is far in excess of any of the other defined centres within the Liverpool City Region.
- 3.2.35 Comparison goods retailing was found to be the dominant sector, equating to 38.3% of units and 47.1% of floorspace respectively. This was significantly above the equivalent national averages at the time of the latest Retail Study. The proportion of floorspace and outlets devoted to leisure uses in the City Centre was also well above the national average. The strength of the centre's comparison goods and leisure offer is an important indicator of its role and function as a regional shopping destination, with an extensive catchment area. This is reinforced by the fact that it accommodates all but one of the top comparison goods retailers in the UK, including John Lewis, and M&S.
- 3.2.36 Javelin Group's VENUESCORE database (2016/17) places Liverpool City Centre as the fifth strongest individual shopping centre in the UK, and it has retained this position over the past few iterations of the database. This represents further evidence that Liverpool is a shopping and leisure destination of national significance, which benefits from an extensive primary catchment area and strong levels of tourism inflow from beyond this.
- 3.2.37 Finally, it is clear from our analysis that there are a significant number of Council strategies, emerging policy documents and schemes which together will result in the regeneration of vast areas of the city centre and its adjacent docklands over the coming years. The overall area earmarked for regeneration can be regarded as one

of the largest in the region, if not the country, and it offers the opportunity to bring forward development that will further elevate Liverpool's status within the region and beyond. In summary, our analysis identifies Liverpool to be a city centre of national significance and one which future regeneration schemes and strategies will enhance still further – ensuring that it maintains this role and function.

3.3 Widnes

Characteristics and Offer

- 3.3.1 Widnes is one of two main town centres in Halton, as defined in the adopted local plan. Widnes is the second largest town in Halton in terms of population, with approximately 61,500 residents (the largest being Runcorn with a slightly higher population).
- 3.3.2 Widnes is located in the southern area of the City Region on the northern bank of the River Mersey, with connections to the south via the Jubilee Bridge and the newly constructed Mersey Gateway Bridge. Liverpool city centre is approximately 20km to the west and Warrington is located approximately 11km to the east.
- 3.3.3 The town centre is focused on the Albert Square Shopping Centre (Also known as Widnes Shopping Centre), Albert Road, Widnes Road, the Green Oaks Centre and Widnes Shopping Park. Generally, the retail units along Albert Road and Widnes Road comprise small terraced units. Albert Square Shopping Centre is a pedestrianised shopping precinct which is mostly comprised of national brands along with some local traders. The Green Oaks Centre is a covered shopping mall which contains a number of high street brands. Widnes Shopping Park is a typical retail park which accommodates several major national brands.
- 3.3.4 There are a number of community and civic facilities in the town centre including a library, a college and Council offices. There is also a large leisure centre complete with gymnasium facilities and a swimming pool.

3.3.5 The centre contains Widnes Market Hall which is a large covered market that is open five days a week. The Market Hall contains a large number of independent convenience goods traders, services and comparison goods traders. There is also the outdoor market adjacent to the Market Hall, which diversifies the offer even further. The markets are considered to be popular, as both the Market Hall and outdoor market operate five days per week, with one of the days at the outdoor market specifically being a flea market selling second hand goods only.

Diversity of Use

3.3.6 The 2009 Retail Study found that Widnes town centre contained 270 units and approximately 78,120 sq.m of floorspace. The Council undertook another retail study in 2017 to inform their now adopted Local Plan, which also included updated health checks. These health checks found an increase in the number of units in Widnes to 316²⁵. However, it is unclear as to whether there has been a corresponding increase in floorspace or not. In addition, the more recent Retail Study assesses the composition of the town centre by use class rather than by the classifications as defined by Experian Goad.

3.3.7 Halton Council have provided us with a Fascia Study which was undertaken in October 2019. This found that Widnes contained 372 retail units and had approximately 83,569 sq.m of retail floorspace. This is the largest number of units and floorspace in Halton and the fifth largest in the City Region.

²⁵ Page 29, Halton Retail Study 2017

Table 3.2 – Diversity of Use: Widnes Town Centre

Use	Percentage of Outlets (Widnes)	Percentage of Outlets (UK Average – 2019)
Convenience Retailing	7.5%	9.2%
Comparison Retailing	24.5%	29.4%
Retail Service	16.4%	16.3%
Leisure Service	21.2%	24.4%
Financial and Business Services	10.2%	9.9%
Vacant	20.2%	11.9%
Total	100%	100%

Source: Halton Fascia Study (2019) and Experian Goad average proportion of unit data for October 2019.

- 3.3.8 Convenience uses in the centre were slightly below average in terms of the number of units however given the centre contains several large foodstores, a market hall and an open market, we would consider convenience provision to be sufficient and cover a wider than local area.
- 3.3.9 Comparison retailing was also below the national average. Analysis of the data suggest that the comparison offer is somewhat varied and covers a range of needs, including clothing, electrical, jewellery, interior decoration and household goods. We would therefore consider this as a however this is still a reasonable representation.
- 3.3.10 Retail services are broadly in line with national averages of the time, and the Financial and Business Service provision is slightly above the national average, indicating the centre has a service oriented role.
- 3.3.11 Leisure Service presence in the centre is below the national average, however we do note the presence of several units greater than 200 sq.m in size, a large variety of leisure uses and specific facilities which would attract a larger than local catchment such as the Widnes Superbowl and Planet Ice. Despite this below average representation, leisure uses are considered strong.

Retailer and Leisure Representation

- 3.3.12 Widnes contains a significant number of national multiple retailers; this includes, Marks & Spencer, Boots, Wilko, Wetherspoons, JD Gym, the Post Office and Morrisons. The health check undertaken to inform the Council's Retail Study noted national retailers are concentrated around the pedestrianised part of Albert Street and within the Albert Square Shopping Centre, Green Oaks Shopping Centre, and Widnes Retail Park. Widnes Road and the northern, non-pedestrianised section of Albert Road mostly comprise of local and independent traders. A clustering of takeaways is also noted around the northern and southern ends of the town centre.
- 3.3.13 Our audit has found 12 of the top 28 comparison retailers as defined by Experian Goad, present in the centre. This is the fourth highest number of any centre in the City Region.

Vacancy Rates

- 3.3.14 20.1% of the units in Widnes town centre were observed as being vacant, this equated to 47.1% of all the town centre's retail floorspace. This was higher than the national averages at the time of 11.9% and 10.5% respectively. This indicates the vacant units are significant sizes. Reviewing the data, the seven largest vacant units collectively equate to over 15,000 sq.m in size.

Accessibility

- 3.3.15 Accessibility is considered to be generally very good. Widnes is well located on the strategic highways network, being roughly located in the middle of the M62 and M56 motorways to the north and south of the town. The town centre is connected to the motorways via the A557 and A533. The road connections to the south of the centre are weaker than in other directions due to the River Mersey's proximity. The centre is served by significant amounts of parking at Asda, Morrisons, the Market Hall, the Green Oakes Centre and the Albert Square Centre.

- 3.3.16 In terms of public transport, Widnes does not have a bus station, but it does have a collection of bus shelters located adjacent to the Green Oaks Centre and several bus stands throughout the town centre. There are numerous bus services which connect the centre to destinations within Halton, the City Region, and beyond such as: Liverpool, St Helens, Warrington, Huyton and Runcorn.
- 3.3.17 Widnes does have a railway station; however, this is located approximately 2km to the north of the town centre. The station is on the Liverpool-Manchester line and has frequent services towards both destinations.
- 3.3.18 The centre is surrounded by residential development to the west, south-west and north and has a large potential walk-in catchment. However, there are some physical and land use constraints which limit this catchment such as Watkinson Way (A557) – which acts as a physical barrier. There are opportunities to cycle, with several bike stores located in the centre, however, there are no routes linking the centre to the northeast and east due to Watkinson Way.

Environmental Quality

- 3.3.19 Victoria Square Conservation Area partially falls within the town centre boundaries, the area within and surrounding has been subject to a high-quality landscaping scheme including modern paving, street furniture and planting, making an attractive area around the Halton Council offices. There are no listed buildings within the town centre.
- 3.3.20 The health check noted Widnes Road as having the look of a more traditional high street, with terraced buildings, trees and benches lining the streets. Albert Road is pedestrianised, which allows for retail units to interact with the street scene and pop-up events / stalls to appear. Whilst the streets themselves are in good condition, there are some issues with a lack of maintenance to some of the retail units. This is more apparent with the Albert Square centre, which we understand has recently

been repaved with a modern paving scheme, but the buildings remain in a mixed condition.

VENUESCORE

3.3.21 VENUESCORE is a Shopping Centre Index which ranks approximately 3,000 UK retail venues - including town centres. The retail offer of each venue is assessed using a scoring system which takes account of multiple retailers, each of which is weighted to reflect its overall impact on shopping patterns. It represents an important tool in understanding the retail hierarchy at a regional and sub-regional level.

3.3.22 The latest VENUESCORE data (2016/17) positions Widnes town centre as the 754th strongest individual shopping centre in the UK. It witnessed a fall in its rank of 19 places between the 2015/16 edition of the database and the 2016/17 edition – the latest available. In the context of the City Region’s 16 defined town / city centres, this ranking places Widnes ninth. Based on its score and ranking, VENUESCORE notes Widnes as being of ‘district’ level significance.

Strategies and Emerging Schemes

3.3.23 Halton Council has developed a masterplan for the Widnes Waterfront, which is the area between the town centre and River Mersey. The masterplan seeks to develop the area into a mixed-use area including employment, leisure and residential uses alongside improving connectivity from the area to the town centre.

3.3.24 Policy CS(R)5 of the Local Plan relates to all of Halton’s centres and defines Widnes as a primary tier centre, which is intended to be the principal focus for new and enhanced retail and other town centre activities in the Borough.

3.3.25 Adjacent to the south of the Town centre, the draft Local Plan designates three areas as Mixed-Use Areas (Widnes Civic Quarter, Victoria Square / Road and Bridge Retail) which are determined as being suitable for a range of town centre uses.

Conclusion

- 3.3.26 Widnes is a relatively strong centre in terms of its convenience and leisure offering, and its comparison uses are supported by a significant concentration of national brands and independent retailers. Whilst there is seemingly little in the way of active masterplans and regeneration schemes which directly relate to the centre, the draft policies set out in the emerging local plan and the development of the new Mersey Gateway Bridge are clearly intended to act as catalysts for the economic regeneration of the town centre, and will better connect it to the sub-regional area and have an overall positive impact on the town centre.
- 3.3.27 The centre is accessible via the strategic highways network and by public transport to destinations within the Halton, to other major areas within the City Region, and those outside of it.
- 3.3.28 We note that whilst Widnes Waterfront does have a masterplan in place, this is not strictly in relation to the town centre and there are no other regeneration schemes being developed. That being said, there are developments in the wider area, such as the new Mersey Crossing, which are projected to have a positive impact on the town centre.
- 3.3.29 Overall, we would consider that Widnes serves the needs of the Halton population and the southern reaches of the City Region. Accordingly, it has a sub-regional role which places it above many of the other smaller town centre in the City Region.

3.4 Runcorn (Old Town)

Characteristics and Offering

- 3.4.1 Runcorn is located in the southern part of Halton on the south bank of the river Mersey, opposite Widnes. Runcorn is designated as a District centre – a second tier town centre. The population of Runcorn is approximately 61,800 residents, which is slightly higher than Widnes.

- 3.4.2 The town of Runcorn is peculiar in the City Region context in the sense that it contains two town centres; Runcorn town centre (also known as Runcorn Old town) and Halton Lea. For clarification, this section audits Runcorn Old Town.
- 3.4.3 The Old Town's growth can be attributed to the development of the Bridgewater Canal and then the Manchester Ship Canal, which are located to the south and north of the town centre respectively. A significant part of Runcorn's growth also came about as a result of its designation as a New Town in 1964.
- 3.4.4 Runcorn Old Town itself is focused around Church Street, High Street and Regent Street. The centre is mostly comprised of small to medium retail units, with some large units also existing – occupied by Co-op Food and Iceland. In addition to the retail offer, Old Town contains the Brindley Performing Arts Centre and Runcorn Swimming Pool.

Diversity of Uses

- 3.4.5 A review of the 2009 Retail Study has found that Runcorn Old Town contains 178 retail units and 28,884 sq.m retail floorspace – this is the largest number of retail units in Halton and fifth highest in the City Region. For reference, the 2017 Retail Study found Runcorn to contain 179 units, which indicates there has not been a significant amount of change in Runcorn between the studies. The Fascia Study conducted by the Council in 2019 identified 169 retail units and 16,657 sq.m of floorspace.
- 3.4.6 The breakdown of retail uses is summarised in Table 3.3 on the next page.

Table 3.3 – Diversity of Use: Runcorn Town Centre

Use	Percentage of Outlets (Widnes)	Percentage of Outlets (UK Average – 2019)
Convenience Retailing	8.3%	9.2%
Comparison Retailing	18.3%	29.4%
Retail Service	20.7%	16.3%
Leisure Service	23.7%	24.4%
Financial and Business Services	11.8%	9.9%
Vacant	17.2%	11.9%
Total	100%	100%

Source: Halton Fascia Study (2019) and Experian Goad average proportion of unit data for October 2019.

- 3.4.7 The data indicates that Runcorn Old Town has a below average convenience retailer presence, however we consider the convenience needs of residents would be met in Halton Lea (see section 3.5). Comparison uses are significantly below the national average, however given the proximity to other centres with higher comparison provision (Halton Lea and the significantly larger Widnes) we do not consider this to be abnormal. Additionally, as identified in the 2009 health checks and demonstrated in the data from the 2019 Fascia Study, the centre contains a large supply of small retail units which may not meet the requirements of modern retailer’s accommodation needs.
- 3.4.8 Retail Service provision and Financial & Business Service provision is above average. Retail services are dominated by health and beauty units. Financial & Business Services have a wide range of sub-uses present, which would cater to a number of daily and more specialist needs.
- 3.4.9 Leisure services are slightly below the national average but we do note a wide range of uses present in the centre within this category including gyms, public houses, cafes and restaurants.

Retailer and Leisure Representation

- 3.4.10 Runcorn Old Town contains one of the top 28 comparison goods retailers as compiled by Experian Goad, this is the lowest in the City Region. The comparison offer for Runcorn seems to be dominated by independent traders, the only other national brands observed include Savers and Card Factory, which we consider to be more akin to budget retailers.
- 3.4.11 The centre does benefit from the presence of a large Co-op Foodstore, which is the main convenience retailer. Other national retailers present include, Natwest, Wetherspoons and HSBC.

Vacancy Rates

- 3.4.12 The vacancy rate observed in the 2019 data was 17.2%. Whilst this is higher than the national average of the time (11.9%), this has improved from the rates which were observed in the 2009 study (20.2%, adjusted from 19.7% following the removal of the miscellaneous category from the counts).

Accessibility

- 3.4.13 The town centre is well located on the local and strategic highways network, being located in between the A533, the Jubilee Bridge (recently renovated and reconfigured, reopening in February 2021) and the new Mersey Gateway Bridge. Parking is available along Church Street and at the Co-op foodstore and can be constrained at peak periods.
- 3.4.14 Despite the centre being within a large residential catchment, issues are noted regarding pedestrian access due to the presence of the major A roads and Jubilee Bridge. Pedestrian connections to some residential areas can only be achieved via subways or bridges which can present issues for some users. The town centre itself is relatively walkable and pedestrian friendly with low kerbs to allow for ease of movement for those with mobility issues.

3.4.15 The town centre contains a bus terminal of several shelters which mostly serve destinations in Halton but also Liverpool and Warrington. Runcorn train station is located within a 1km walk of the centre but suffers from similar legibility and connectivity issues as the residential areas due to the presence of the A roads and Jubilee Bridge – we are aware that some of the roads associated with the Jubilee bridge will be removed and altered as a result of the new Mersey Gateway Bridge.

Environmental Quality

3.4.16 The centre has had significant investment in recent years as can be seen along Church Street, the Canal Quarter and along the waterfront. However, issues surrounding internal permeability and connections to outside of the centre impact on the overall environmental quality. As noted above though, these issues may be rectified in future, now the new Mersey Gateway Bridge has been completed.

3.4.17 Runcorn has an interesting street aesthetic, comprising of smaller retail units of varying heights and some medium sized ones – This contributes to a somewhat interesting visual quality. It is noted that some frontages are poor and inactive which detract from the overall visual quality. It was also noted that there are areas where soft landscaping measures and street furniture would be beneficial.

VENUESCORE

3.4.18 The latest VENUESCORE data (2016/17) positions Runcorn Old Town centre as the 1,888th strongest individual shopping centre in the UK. It witnessed a fall in its rank of 99 places between the 2015/16 edition of the database and the 2016/17 edition – the latest available.

3.4.19 In the context of the City Region's 16 defined town/city centres, this ranking places Runcorn Old Town in the lowest position within the City Region. The VENUESCORE ranking notes Runcorn as being of 'local' significance based on the scoring.

Council Strategies and Emerging Schemes

- 3.4.20 As part of the Jubilee Bridge renovations, 'Trumpet Junction' was demolished, clearing the way for the new Station Quarter redevelopment. This scheme is aimed at regenerating the area around Runcorn train station and intends to act as a node for new commercial and residential development, and also to better connect it to the town centre, now that the new Mersey Gateway Bridge has opened. The scheme is expected to be complete in Spring 2024.
- 3.4.21 Policy CS(R)5 of the Local Plan recognises the importance of Runcorn old town within the plan areas and designates it as a District Centre, a second-tier town centre, which has a role and function for convenience, local and niche comparison retailing, service and leisure uses.
- 3.4.22 Runcorn was awarded £23.6m funding from the Government's Town Deal scheme²⁶, which will be used to finance the Station Quarter redevelopment as well as a series of other developments, including:
- Unlock Runcorn;
 - Enhancements to Brindley Theatre;
 - Active transport enhancements to improve connectivity on High Street;
 - A new health and education hub on High Street; and
 - A new creative and digital skills centre on High Street.
- 3.4.23 Documents prepared by both the Council and GVA associated with the development of the new Mersey Gateway Bridge identify Runcorn Old Town as a strategic regeneration impact area which will directly benefit from the bridge's construction. Documents published by the Council relating to the Mersey Gateway scheme indicate that, for Runcorn Old Town, the new crossing will help create new retail investment and leisure opportunities, unlock approximately 530 new homes,

²⁶ <https://www.runcornandwidnesworld.co.uk/news/19664095.new-details-revealed-23m-runcorn-investment/>

improve connectivity and act as a stimulus for the visitor and financial service sectors.

3.4.24 Additionally, the Council produced a draft supplementary planning guidance document in 2007 to guide developers with land use planning matters for any new development within Runcorn Old Town.

Conclusion

3.4.25 In conclusion, Runcorn Old Town is a relatively vital and viable centre, but it is not as strong as others considered in this audit. This is based on the prevalence of services and deficit of comparison retailers – indicating residents may have to travel elsewhere for their comparison needs, namely either Widnes or Halton Lea.

3.4.26 The regeneration efforts outlined are intended to significantly enhance the townscape and offer of Runcorn, which are considered to be a major positive and the granting of Government Funding provides security of their delivery, but these plans and their benefits will not be fully realised or apparent for some years to come.

3.4.27 The town suffers from poor pedestrian connectivity, but it is recognised that there is relatively good public transport connections and accessibility by car. The centre scores low on the VENUESCORE rankings, suggesting that it functions as a relatively low-level service centre which serves the needs of its immediately surrounding residential population.

3.5 Halton Lea (Runcorn Shopping City)

Characteristics and Offer

3.5.1 Halton Lea is located approximately 3km to the southeast of Runcorn Old town and 28km to the southeast of Liverpool city centre. The city of Chester is located approximately 25km to the southwest.

3.5.2 Halton Lea was designed as a self-contained town centre for the development associated with Runcorn’s designation as a New Town. The centre is arranged around a central square with malls leading to four peripheral car parks and pedestrian link bridges to the residential areas beyond. Modern retail park type developments have been constructed around the centre which fall within the defined town centre boundaries.

Diversity of Uses

3.5.3 Based on a review of the 2009 retail study, Halton Lea contains 105 units and approximately 41,923 sq.m of floorspace. The Council Fascia study identified 120 retail units and 59,717 sq.m floorspace. Given the format of the centre as a covered and self-contained shopping mall, it is most likely this increase has been as a result of the retail park style developments.

3.5.4 The breakdown of uses to each Experian Goad category is summarised below:

Table 3.4 – Diversity of Use: Halton Lea Town Centre

Use	Percentage of Outlets (Widnes)	Percentage of Outlets (UK Average – 2019)
Convenience Retailing	8.3%	9.2%
Comparison Retailing	30.8%	29.4%
Retail Service	7.5%	16.3%
Leisure Service	16.7%	24.4%
Financial and Business Services	5.8%	9.9%
Vacant	30.8%	11.9%
Total	100%	100%

Source: Halton Fascia Study (2019) and Experian Goad average proportion of unit data for October 2019.

3.5.5 The figures indicate that Halton Lea acts as a comparison destination given its higher than national average proportions, it is also the highest proportion of comparison retailing in Halton. There is also a slightly below average convenience presence in the centre, however the provision comprises larger food stores including Asda, Lidl, Aldi, Farmfoods and Iceland. Given that there is a lack of larger convenience retailers

within Runcorn Old town (which comprises of Iceland), it is possible that the convenience presence in Halton Lea compensates for this – this indicates that the centre serves a wide convenience catchment.

- 3.5.6 There is a general deficit with regards to all types of services in the centre. Retail Service provision is less than half of the national average, Leisure Services and Financial & Business Services are also markedly below their respective national averages.
- 3.5.7 Analysis of the Fascia Study has found that, when compared to other centres, Halton Lea has a deficit of bars, restaurants, health & beauty units (barbers, salons etc), financial institutions (other than retail banks) and estate agents. Given Halton Lea is a managed centre these deficits potentially could be attributed to the unit types available and the letting practices of the centre's owner.

Retailer and Leisure Representation

- 3.5.8 A review of the brands present in Halton Lea has determined the centre contains eight out of the top 28 comparison retailers as defined by Experian Goad (this is about average for the centres in the City Region) and is sixth when compared to the amount observed in other centres in the City Region.
- 3.5.9 The centre's convenience offer is dominated by the ASDA supermarket and is supplemented by Aldi, Lidl and Farmfoods. For comparison goods; major retailers include Argos, New Look, Wilko and EE.
- 3.5.10 The number of service operators is low, however there is a large Cineworld which anchors the leisure service sector and several major fast food chains (McDonalds, Burger King, KFC). There is a notable lack of pubs, cafes and restaurants present in the centre.
- 3.5.11 It is noted though that the presence of a large number of national brands has been at the expense of local and independent traders present in the centre.

Vacancy Rates

3.5.12 The proportion of vacant unit rates observed in Halton Lea during the 2009 health checks were nearly twice the national average of the time. This high vacancy rate was also noted in the 2017 health checks²⁷.

Accessibility

3.5.13 The centre is well located on the strategic and local highway network, being adjacent to the A533. It is highly accessible by car and the centre has sufficient levels of car parking with over 2,000 spaces in the main Halton Lea town centre building itself.

3.5.14 Pedestrian access is segregated from vehicles and, despite being well defined, it constrains pedestrian circulation around the centre. It identified that the centre would benefit from connectivity improvements between the shopping areas.

3.5.15 For public transport, the centre has two bus stations which were purpose built as part of the centre's construction. Services primarily extend out towards destinations in Halton as well as Liverpool and Warrington. There is no train station in the vicinity.

Environmental Quality

3.5.16 The health check for the 2009 Retail Study found the interior to the main town centre building to be well maintained and clean. However, the exterior was found to be dated, monolithic and of little visual interest. There was also minimal interaction between the interior of the centre and outdoors, with minimal natural light. The segregation of pedestrian and vehicular traffic contributes to a poor street scene and environment. The centre contains little street furniture, landscaping or focal points for people to convene. Overall, the environmental quality was considered to be poor.

²⁷ The health check, conducted by England, Lyle and Good as part of the 2017 Retail Study, observed a 16% vacancy rate in Halton Lea centre.

VENUESCORE

- 3.5.17 The latest VENUESCORE data (2016/17) places Halton Lea in 710th position in the UK. This represented a fall of 51 places between the 2015/16 edition of the database and the 2016/17 edition – the latest available.
- 3.5.18 Halton Lea is the highest-ranking centre within Halton. In the context of the City Region’s 16 defined town/city centres, this ranking places Halton Lea in 8th position within the City Region. The VENUESCORE ranking notes Halton Lea as being of district level significance based on the scoring.

Council Strategies and Emerging Schemes

- 3.5.19 Halton Lea is one of the Government’s proposed healthy new towns, which seeks to regenerate the town centre and surrounding area into a thriving community hub, developing a health and wellbeing ecosystem. The healthy new town initiative is still in its infancy, but it is intended to be supported by a masterplan framework to support the area’s development and regeneration over the next 5-10 years. A masterplan has been commissioned but is yet to be adopted. The Council produced draft supplementary planning guidance in 2007 to guide developers with the planning of new development within Halton Lea town centre.
- 3.5.20 The Local Plan for Halton defines Halton Lea, under Policy CS(R)5, as a Town Centre, which is a primary tier centre. Halton Lea is intended to be the principal focus for new and enhanced retail and other town centre activity.
- 3.5.21 In July 2019, the Combined Authority announced that Halton Lea is one of ten towns which would benefit from their Town Centre funding initiative. The overall funding pot is £6m and each constituent Local Authority would receive a maximum of £1m each. Specifically for Halton Lea, the funding is anticipated to be used to develop a wayfinding strategy for the town centre, enhancing pedestrian linkages and the

development of a community shop, children's centre/youth zone and a rooftop garden.

Conclusion

- 3.5.22 Halton Lea is a large centre which is seemingly orientated towards catering for users convenience and comparison goods needs, as demonstrated by the large amount of food and non-food retailers present. The centre suffers from a high vacancy rate and a significant lack of services, which are most likely met elsewhere. Whilst access by car is good, pedestrian access is limited and public transport is mostly restricted to serving the Halton area.
- 3.5.23 The Venuescore rankings show that Halton Lea scores reasonably and the audit has demonstrated that the centre contains a notable amount of the top national comparison retailers, and other major national brands. It does this though at the expense of local and independent traders, which this audit considers could impact the centre's offering and character.
- 3.5.24 The environmental quality of the centre is considered to be poor, however, the Healthy New Towns scheme is seeking to address this poor quality, alongside improving accessibility for pedestrians.
- 3.5.25 Based on the above, this audit considers Halton Lea to be of a mid-level standing within the City Region, with a role and function which is largely focussed upon serving the day-to-day needs of Runcorn residents, alongside Runcorn Old Town.

3.6 Huyton

Characteristics and Offer

- 3.6.1 Huyton town centre is located approximately 12km to the east of Liverpool city centre. Huyton forms one of the three main town centres of Knowsley Borough, the

others being Prescot and Kirkby, which are located 4km to the north east and 10km to the north respectively. Huyton has a population of around 33,100 people.

- 3.6.2 Huyton town centre is roughly triangular in shape and is focused on Lathom Road, Derby Road, Cavendish Walk and the Sherborne Centre. The town centre is relatively modern, with most of the buildings constructed from the mid-20th century onwards, with Sherbourne Square having a 1950's style precinct aesthetic. There is a significant clustering of government and civic offices in the southern area of the town centre indicating that it acts as an employment hub.
- 3.6.3 The retail units are predominantly small in size with a limited proportion of medium sized units. The Asda supermarket is significantly larger than the other units contained in the centre and the bingo hall at the southern end is also of notable size.

Diversity of Uses

- 3.6.4 An analysis undertaken as part of Council commissioned retail studies in 2009 and 2013 found that Huyton contained a total of 100 units. In terms of floorspace, the Council's retail evidence suggests that the town centre contains some 31,260 sq.m of retail floorspace. Limited development has taken place within the town centre in the meantime to increase this figure materially. Table 3.5 on the next page shows the proportional split of outlets in percentage terms across retail, leisure and commercial sectors.

Table 3.5 – Diversity of Use: Huyton Town Centre

Use	Percentage of Outlets (Huyton)	Percentage of Outlets (UK Average – 2009)
Convenience Retailing	11.0%	8.8%
Comparison Retailing	43.0%	34.6%
Retail Service	13.0%	13.0%
Leisure Service	6.0%	21.5%
Financial and Business Services	8.0%	11.1%
Vacant	19.0%	10.6%
Total	100%	100%

Source: Knowsley Town Centres and Shopping Study (Nov 2009) and Experian Goad average proportion of unit data for July 2009.

- 3.6.5 Huyton has an over-representation of convenience uses, mainly comprising bakers and grocery stores. Although not included in the above, the over-representation of convenience uses is mirrored in the amount of floorspace, which is attributed to the presence of the large Asda supermarket.
- 3.6.6 Huyton is noted in as having a significant over-representation of comparison uses. The 2009 health check states this is primarily a result of a large number of charity shops, DIY stores and homeware stores. It also notes the comparison goods offer is characterised by a 'discount goods' focus.
- 3.6.7 Leisure services are significantly underrepresented in Huyton, and the health check notes that there is lack of an evening economy offer in the centre. We do note the presence of a large bingo hall (Bingo 3000), however it is not known if this unit was operating at the time of the health check and if so, if it was counted due to the changes in Experian Goads data collection, presentation and tabulation methods.
- 3.6.8 The diversity of use analysis initially suggests that Huyton is a major comparison goods shopping destination. However, upon closer inspection, the audit has found that Huyton most likely serves the day to day needs of the local population.

Retailer and Leisure Representation

- 3.6.9 Huyton contains some major national brands in the town centre. The convenience offer is anchored by an Asda supermarket. The largest comparison retailer is the Wilko located off Lathom Road. Other national brands present are Peacocks, McDonalds, Subway, Halifax, Superdrug and the Post Office
- 3.6.10 A review of the top 28 comparison retailers, as compiled by Experian Goad, has found that Huyton has eight of the named retailers, including; WH Smith, Wilkos, Boots and New Look. This is more than the other centres in Knowsley and is about average overall for centres in the City Region.

Vacancies

- 3.6.11 The health check for the 2009 retail study identified 19.0% of all units in Huyton town centre as vacant, equating to approximately 9.8% of the total amount of floorspace. This is significantly more than the national average at the time of 12.4% for the proportion of units but less than the floorspace average of 10.5%, most likely due to the small size of units. It is noted there was a concentration of vacant units in Sherbourne Square. It also notes there were unlet units in the then recently completed Cavendish Walk development.

Accessibility

- 3.6.12 The centre is well connected to the local and strategic highways network being in close proximity to the M62 and M57 motorways. The centre is served by a number of car parks, including the large multi-storey facility off Lathom Road. For public transport, the town centre has a large bus station which has routes towards destinations within Knowsley, including Prescot, St Helens, Liverpool and Warrington.

3.6.13 Huyton train station, located at the southern periphery of the centre, has recently been refurbished to accommodate four platforms and has regular services towards Liverpool, Warrington and Wigan.

Environmental Quality

3.6.14 In the health checks for the 2009 Retail Study, the public realm was noted as being recently updated and as being of good environmental quality. The pedestrianised core along Derby Road was noted as being clean and well maintained with street furniture and planting.

3.6.15 Sherbourne Square is identified as suffering from poorly maintained frontages and the concentration of vacant units there has a negative impact on its environmental quality. Whilst there were noticeable efforts to upgrade the public realm in Huyton town centre, the health check considers the town centre has a utilitarian appearance with a number of vacant units and discount uses in prominent positions.

VENUESCORE

3.6.16 The latest VENUESCORE Shopping Centre Index (2016/17) identifies Huyton town centre as the 473rd strongest individual shopping centre in the UK. This was an increase of 43 places between the 2015/16 edition of the database and the 2016/17 edition – the latest available. This is an indication of continued improvements to the town centre.

3.6.17 In the context of the City Region's 16 defined town/city centres, this VENUESCORE ranking places Huyton in sixth place. Based upon their scoring, VENUESCORE notes Huyton is a major district centre.

Council Strategies and Emerging Schemes

3.6.18 Regarding strategies and the future development of Huyton, the Council adopted a Town Centre Masterplan which seeks to set out a new vision for the town up to

2028. The masterplan sets out a series of strategic objectives and also specific measures, including:

- Improving access and connectivity both going to and within the centre;
- Focusing activity to key streets within the centre and promoting good quality frontages;
- Improvement of the environmental quality such as enhancing the pedestrian routes and spaces; and,
- Strengthening the local economy through capitalising on the Huyton's strong civic role and developing the retail environment.

3.6.19 The masterplan identifies key opportunity sites for development and specifically identifies Lathom Road as an action area, setting out preferred uses, design and development principles for the key sites contained within it. In December 2020, The Council voted to accelerate the transformation of Huyton and prepared a ten-year delivery plan to support the masterplan. The plans include plans to redevelop existing spaces which are surplus to Council requirements and deliver a new commercial district, creating a new public space to create a sense of arrival at Huyton station and the creation of a high quality streetscape along Derby Road. We are aware the Council are applying for central funding to secure the masterplans ambitions and remain committed to its implementation.

3.6.20 In July 2019, Huyton was announced as being a beneficiary of funds from the Combined Authority to put towards town centre improvements, with up to £1m being granted to each constituent Local Authority. Specific measures outlined for Huyton include developing an event strategy and delivery programme which drives interest and attraction to the centre, commissioning a marketing and promotion plan, develop a business grant offer, improving the visitor experience and evening economy, and a range of other high street initiatives.

Conclusion

- 3.6.21 Huyton is a small centre which is considered to be highly accessible by private and public transportation. There has been significant investment in the centre's public realm, however, the retail units require improvements and there are areas where the environmental quality is poor. The unit stock predominantly comprises of small sized units which may put off some retail classes and operators.
- 3.6.22 The centre does contain a significant number of national retailers, including eight of the top 28 performing comparison brands. However, there is a disproportionately a high comparison retail representation - the offering of which was mostly considered to be focused on discount goods - and an above average vacancy rate. There is also below average retail service, leisure service, and financial and business service representation. It is specifically noted that there is a lack of an evening economy.
- 3.6.23 There is a significant clustering of government and civic institutions and offices in the centre which indicates that it acts as an employment hub. Based on the above, the centre acts as an important service centre for Knowsley and is therefore of significance at the borough level.

3.7 Kirkby

Characteristics and Offer

- 3.7.1 Kirkby town centre, which is located at the northern end of Knowsley borough, serves the primarily residential area of Kirkby and its population of approximately 42,750 people (2011 census). In terms of surrounding City Region centres, Liverpool city centre is approximately 10.5km to the south-west, Prescot is 8km to the south-east, and Bootle is 8.5km to the west.
- 3.7.2 With Kirkby originally developed as a post-war 'overspill' estate, the town centre takes the form of a relatively extensive 1960's shopping precinct, containing in the order of some 90 units and presently owned and managed by St Modwen. As a

planned town centre, Kirkby benefits from various other centrally located amenities; including a library, bus interchange, health centre and nearby leisure centre. The centre also benefits from a new covered market that can accommodate up to 130 stalls.

Diversity of Use

3.7.3 With regards the scale and form of Kirkby town centre, analysis undertaken as part of Council commissioned retail studies in 2009 and 2013²⁸ found that it contained a total of 91 units. In terms of floorspace, the Council’s retail evidence base suggests that the town centre encompassed some 28,572 sq.m of commercial floorspace when surveyed. Limited development has taken place within the town centre in the meantime to increase this figure materially. The table below shows the proportional split of outlets in percentage terms across retail, leisure and commercial sectors. It also identifies the centre’s vacancy rate, as recorded in 2009.

Table 3.6 – Diversity of Use: Kirkby Town Centre

Use	Percentage of Outlets (Kirkby)	Percentage of Outlets (UK Average – 2009)
Convenience Retailing	19.8%	8.8%
Comparison Retailing	46.2%	34.6%
Retail Service	8.8%	13.0%
Leisure Service	5.5%	21.5%
Financial and Business Services	6.6%	11.1%
Vacant	13.2%	10.6%
Total	100%	100%

Source: Knowsley Town Centres and Shopping Study (Nov 2009) and Experian Goad average proportion of units data for July 2009.

3.7.4 Whilst it is accepted that the Council commissioned diversity of use analysis of 2009 is now some years out of date, it remains useful as a general indicator of the role and function of Kirkby., particularly given that there has been very limited change

²⁸ Knowsley Local Development Framework: Town Centres and Shopping Study (Nov 2009) and Knowsley Local Plan: Core Strategy – Technical Report - Planning for Retail in Knowsley (July 2013).

in terms of the overall quantum of commercial floorspace in the town centre in the intervening period. For example, the analysis showed that the centre had an above average proportion of convenience and comparison goods units when surveyed. Our observations suggest that this remains the case, with multiple retailers such as Heron, Iceland and Farmfoods present alongside a range of smaller bakers and butchers. National multiple comparison goods retailers are also present, including B&M Bargains, Peacocks, New Look and Superdrug.

3.7.5 In contrast to the convenience and comparison sectors, it is noted that the Council commissioned health checks found that the proportion of retail and business service uses was below the national average. Furthermore, the proportion of units within a leisure service use (restaurants, cafés, bars, etc.) was found to be considerably below the national average.

3.7.6 The diversity of use and quantum analysis suggests that Kirkby town centre's role is largely that of a service centre, meeting the day-to-day needs of the population (circa 40,000 people) residing within the surrounding residential estates. This is as opposed to functioning as a higher order, non-food focussed shopping destination that serves a wider catchment area. The health check data clearly shows that Kirkby performs better in some sectors (i.e. convenience and comparison goods) than others, with a key deficiency appearing to be in its leisure / evening economy sector.

Retail and Leisure Representation

3.7.7 Kirkby town centre includes 4 of the top 28 comparison goods retailers within Experian's annual 'top retailers' list. This includes Superdrug, WH Smith, O2 and New Look. Alongside the 'top' comparison goods operators, the centre benefits from a number of other retailers within this sector, including Home Bargains, B&M Bargains, Peacocks and Poundland. One observation on the comparison goods retailers present is that there is a predominance of discount operators.

- 3.7.8 Kirkby's convenience retail offer includes a small Iceland, Heron and Farmfoods supermarkets alongside a range of independent operators. The convenience offer has recently improved following the opening of Morrisons in October 2021, the centre previously had no major food store presence with the last one being Asda which closed in the 1970's.
- 3.7.9 The town centre's leisure and evening economies are currently very weak. There are very few restaurants, bars or cafés and no multiple retailers in these sectors, other than a fast food restaurant chains located in the new retail development Irlam Way and County Road. This is evidently a sector within Kirkby that would benefit from enhancement.

Vacancies

- 3.7.10 With regards town centre vacancies, health check work undertaken as part of the 2009 Retail Study found that the proportion of vacant street level units within the centre (13.2%) was above the national average at the time (10.6%). Our more recent observations suggest that this position has remained the same, with in excess of ten units currently unoccupied within the shopping precinct. Given that a number of the vacancies are units of a format that would have traditionally attracted comparison goods retailers, it is likely that uncertainly in this sector over the past decade has led to a negative impact upon lettings.

Accessibility

- 3.7.11 The health check assessment undertaken as part of the Council's evidence base highlights that Kirkby benefits from good accessibility by private car, given its close relationship to the national motorway network and a number of primary vehicular routes. The town centre includes various surface level car parks as well as a multi-storey car park off Telegraph Way.

3.7.12 Kirkby town centre benefits from numerous high frequency bus services linking the town centre with residential areas and other centres such as Liverpool City Centre. Kirkby's bus station is located immediately adjacent to the main shopping area of St Chad's Parade. Kirkby is also served by the Liverpool to Wigan railway line, although the station is located approximately 1km to the west of the town centre. Finally, pedestrian linkages between the town centre and surrounding residential areas are good, resulting in a significant number of people being able to walk to the centre.

Environmental Quality

3.7.13 The 2009 Retail Study stated that Kirkby is an inward looking and unattractive purpose-built town centre. It added that the majority of the retail property in Kirkby is of a poor architectural quality, that units are primarily small to medium size, and that they are often in a poor state of repair and deficient in townscape terms. Finally, the retail study stated that environmental quality is particularly poor at key gateways, producing a negative impression of the town upon arrival – with security shutters and open service yards contributing to an overall negative environment. The overall view was that Kirkby town centre was in need of significant environmental enhancement.

3.7.14 However, in the intervening period, substantial investment has been made in the town centre. Kirkby Market was refurbished in 2014 and in 2015 the civic square outside the Kirkby Centre was renovated. In addition, various pieces of public art have been installed throughout the centre, as well as new benches and landscaping. In 2016 the new bus station was completed and most recently the new Morrisons was completed.

3.7.15 These works have brought about a marked improved to the centre to date although the constraints relating to the appearance and function of the 1960's precinct remain.

VENUESCORE

- 3.7.16 The latest VENUESCORE Shopping Centre Index (2016/17) identifies Kirkby town centre as the 937th strongest individual shopping centre in the UK. It witnessed a rise in its rank of 6 places between the 2015/16 edition of the database and the 2016/17 edition – the latest available. This is likely to be reflective of changes in representation within the shopping precinct, as opposed to the introduction of new retail floorspace. For example, we are aware that B&M Bargains moved into a vacated unit in 2016.
- 3.7.17 In the context of the City Region’s 16 defined town/city centres, this VENUESCORE ranking places Kirkby in 11th place. The evidence confirms that in the context of the Liverpool City Region, Kirkby functions as a ‘mid-level’ service centre that meets the day-to-day needs of the local populace but is unlikely to attract a great deal of custom from beyond this immediate catchment area.

Council Strategies and Emerging Schemes

- 3.7.18 St Modwen acquired Kirkby town centre in November 2015 and worked with Knowsley Council to develop plans for the expansion of the centre and regeneration of the surrounding area. In November 2017 St Modwen secured planning permission for a mixed-use scheme for 12,000sq.m of new commercial floorspace, including a 4,200 sq.m food superstore and fourteen units operating in a combination of retail, leisure and restaurant uses. The application also included the provision of 480 car parking spaces and extensive hard and soft landscape works.
- 3.7.19 The result is that the town centre is being extended to the north on cleared land which was (until 2017) occupied by a former foodstore and its associated surface level car parking. In total circa 12,000sq.m floorspace was demolished to enable the 2017 consent to be implemented. Therefore, the net change in floor space for Kirkby town centre is negligible.

- 3.7.20 This part of the scheme has now been delivered.
- 3.7.21 In November 2019 Knowsley Council bought Kirkby town centre from St Modwen at a total cost of £44m, with the Combined Authority contributing £10m. The Council now have control of the existing shopping centre (approximately 87 units) and 12.4 acres of land and have continued to progress the plans for the town centre.
- 3.7.22 In December 2020, the Combined Authority agreed to further investment of £2.8m to support the second phase of the regeneration, which will see the development of a multi-screen cinema as well as food and beverage outlets. The cinema (set to be operated by Reel)

Conclusions

- 3.7.23 In conclusion, the Council's retail evidence base highlighted that Kirkby was a centre in need of intervention and investment. Whilst the centre was considered to perform adequately as a locally focused convenience and comparison-goods shopping destination, it was clear that significant deficiencies existed.
- 3.7.24 The Council have sought to address these deficiencies and a new Morrisons foodstore has now been delivered as part of a 12,000sq.m regeneration to the town centre. Knowsley Council now have control over the centre and is in a position to guide and shape the future development and management of Kirkby town centre. The future plans to deliver a cinema will also help to address the deficiencies highlighted in the retail study.
- 3.7.25 The critical mass of recent and proposed development is anticipated to have a transformative effect on the town centre's offer, ensuring that it fully meets the needs of Kirkby's resident population and also better competes with surrounding town centres and retail facilities – such as Sefton's Aintree Retail Park, which is located only a short journey west.

3.7.26 Whilst this investment will no doubt enhance the vitality and viability of Kirkby, it is still considered that in the context of the City Region as a whole, it will remain a 'mid-level' centre serving the Knowsley area rather than one of wider sub-regional significance.

3.8 Prescott

Characteristics and Offer

3.8.1 Prescott town centre is located within the borough of Knowsley and serves a settlement of the same name, which contains some 38,000 inhabitants based on the 2011 census. Liverpool city centre lies approximately 13km to the west, with Huyton town centre 3km to the south-west, and Kirkby town centre 8km to the north-west (the latter two centres also forming part of Knowsley borough).

3.8.2 The centre is largely focussed along Eccleston Street, with other units on High Street, Warrington Road and Market Place. It benefits from a covered shopping centre (Prescot Shopping Centre) which opened in the late 1980's and contains in the order of 28 units over two levels. The other units within the town centre are mostly small-scale, traditional, terraced units, which are occupied by a combination of independents and national multiples. A substantial retail park (Cables Retail Park) is located immediately south of the town centre. Prescott is the oldest town centre in Knowsley and the only one with a significant number of buildings dating from the 18th and 19th centuries.

Diversity of Use

3.8.3 With regards the composition of Prescott town centre, analysis undertaken as part of Council commissioned retail studies in 2009 and 2013²⁹ found that it contained a total of 141 units. In terms of floorspace, the Council's retail evidence suggests that

²⁹ Knowsley Local Development Framework: Town Centres and Shopping Study (Nov 2009) and Knowsley Local Plan: Core Strategy – Technical Report - Planning for Retail in Knowsley (July 2013).

the town centre contains some 19,810 sq.m but if the Cables Retail Park is added to this figure then total floorspace increases to approximately 33,800 sq.m³⁰. Limited development has taken place within the town centre in the meantime to increase this figure materially. The table below shows the proportional split of outlets in percentage terms across retail, leisure and commercial sectors. It also identifies the centre’s vacancy rate, as recorded in 2009.

Table 3.7 – Diversity of Use: Prescot Town Centre

Use	Percentage of Outlets (Prescot)	Percentage of Outlets (UK Average – 2009)
Convenience Retailing	12.2%	8.8%
Comparison Retailing	38.8%	34.6%
Retail Service	12.2%	13.0%
Leisure Service	7.2%	21.5%
Financial and Business Services	11.5%	11.2%
Vacant	18.0%	10.6%
Total	100%	100%

Source: Knowsley Town Centres and Shopping Study (Nov 2009) and Experian Goad average proportion of units data for July 2009.

3.8.4 Whilst the Council commissioned diversity of use analysis of 2009 is now some years out of date, it remains useful as a general indicator of the role and function of Prescot, particularly given that there has been little change in terms of the overall quantum of floorspace in the town centre in the intervening period. For example, the analysis showed that the centre had an above average proportion of convenience goods units – which includes independents and national multiples such as Heron Foods and Farmfoods.

3.8.5 Prescot also had a slightly above average proportion of comparison goods units, although this is a finding that is not necessarily any longer the case, based on our observations. The proportion of units occupied by retail services was broadly in line with the national average, whilst the proportion of units in financial and business

³⁰ Taken from Table 3.2 of the Core Strategy Planning for Retail Technical Report (July 2013).

service use was above average. Finally, the proportion of units within a leisure service use (restaurants, cafés, bars, etc.) was found to be well below the national average. In the absence of a more up to date evidence base it is hard to confirm if this remains the case following the interventions by the Council since 2013. These interventions will be discussed in more detail below.

- 3.8.6 The diversity of use analysis implies that Prescott town centre's role is one largely of serving localised needs. This is evidenced by the fact that it is well supported by convenience, retail service and financial service uses. In contrast, the comparison goods offer is more limited – reflective of the fact that such goods are typically purchased in higher order centres. It therefore appears that Prescott town centre is typically being used by those residing in the town to meet day-to-day needs, as opposed to functioning as a higher order, non-food focussed shopping destination serving a wider catchment area.
- 3.8.7 A further factor in the centre's limited present-day non-food offer is the proximity of the Cables Retail Park, which benefits from a range of large format retail units. These units have inevitably attracted comparison goods retailers who might otherwise have looked to the town centre in order to secure representation within the Prescott area.

Retail and Leisure Representation

- 3.8.8 It is noted that Prescott town centre includes only 2 of the top 28 comparison goods retailers within Experian's annual 'top retailers' list (Boots and Superdrug). However, there is a handful of other multiple comparison goods retailers present including M & Co, Card Factory, Home Bargains, Clintons Cards and Bon Marche. This limited provision is unsurprising given the proximity of the Cables Retail Park, which contains leading brands including Argos, Outfit, Boots, TK Maxx and Next.
- 3.8.9 Prescott town centre's convenience retail offer includes Heron Foods alongside a range of independent operators. There are also Tesco and M&S foodstores on the

nearby Cables Retail Park. Financial services include Halifax and Lloyds banks. The centre's leisure and evening economies were very weak when the last retail study was done in 2013, with very few restaurants, bars or cafés and no multiple retailers in these sectors, other than a fast-food restaurants on Cables Retail Park and JD Wetherspoons. Our observations of the current provision within Prescot town centre indicate that it has already benefitted from enhancement in this sector over recent years.

Vacancies

- 3.8.10 With regards street level vacancies, health check work undertaken as part of the 2009 Retail Study found that the proportion of vacant street level units within the centre (18%) was above the national average at the time (10.6%). Our more recent observations suggest that this position has not changed, with a number of units currently unoccupied within Prescot Shopping Precinct and on the centre's more peripheral streets.
- 3.8.11 In the case of Prescot Shopping Precinct - where units are of a scale and format that would have traditionally attracted comparison goods retailers - it is likely that uncertainty in this sector over the past decade has had a negative impact upon lettings. The proximity of Cables Retail Park is also likely to have negatively influenced the attraction of in-centre units for comparison goods retailers.

Accessibility

- 3.8.12 Prescot is relatively easy to access by both private car and public transport. The town centre is close to Junction 2 of the M57 and benefits from good connections to surrounding residential areas via an existing network of 'A-roads'. There are various bus stops on High Street, with services that serve surrounding residential areas. Prescot railway station is located to the south of the centre and provides direct services to Liverpool city centre. Finally, the centre is situated within a densely

populated residential area and therefore benefits from an extensive walk-in catchment.

Environmental Quality

- 3.8.13 With regards Prescott's environmental quality, the health check undertaken as part of the Council's 2009 Retail Study highlighted that the town centre was the oldest in Knowsley and the only one with a significant number of buildings dating from the 18th and 19th centuries. Much of the centre is designated a Conservation Area, and this includes the main pedestrian shopping area along Eccleston Street.
- 3.8.14 Whilst this designation may suggest a strong environmental quality, the Study found that actually a large number of buildings in the town centre were in a poor state of repair – resulting in a negative impact. Further, it was noted that Prescott Shopping Centre suffered from a high level of vacancies at the time (a constraint that remains), and this was a further detrimental factor on overall environmental quality.
- 3.8.15 Finally, the previous Retail Study explained that the public realm in Prescott town centre would benefit from improved landscaping and planting, with 'High Street' not giving the feel of being part of the town centre.
- 3.8.16 Significant public realm improvements have since been implemented in Prescott town centre. Knowsley Council secured £3.2m of Heritage Lottery funding for a Townscape Heritage Initiative (THI), which has been transforming the buildings and streetscene in the centre. The THI improved Leyland Street in 2013 and Atherton Street in 2016. Works to Market Place commenced in 2018 and are now complete. It delivered a new café/bistro and outdoor performance space within the very heart of the town centre.
- 3.8.17 The Eccleston Street public realm improvement scheme was completed early in 2021. This included new bespoke paving along the full length of Eccleston Street, upgraded street furniture and improved access for pedestrians. The project was

funded by the Liverpool City Region Combined Authority through the Local Growth Fund as part of the wider £8 million Shakespeare North Rail Interchange programme. This also includes the Prescott Connectivity Gateway arts project, the illumination of St Mary's Church, the construction of lift shafts at Prescott railway station, as well as resurfacing the station car park. The rest of the programme was also completed in 2021.

VENUESCORE

- 3.8.18 The latest VENUESCORE Shopping Centre Index (2016/17) identifies Prescott town centre as the 1,559th strongest individual shopping centre in the UK. It witnessed a fall in its rank of 130 places between the 2015/16 edition of the database and the 2016/17 edition – the latest available. This is likely due to its relatively high vacancy rates and the loss of several national multiples at the time. The 2016/17 probably did not yet reflect the investment into Prescott town centre that was gaining momentum at the time.
- 3.8.19 In the context of the City Region's 16 defined town/city centres, this VENUESCORE ranking places Prescott in penultimate position (15th). It reinforces the notion that Prescott is a shopping destination of local significance, which serves the day-to-day needs of the town but is unlikely to attract a great deal of custom from beyond this.

Council Strategies and Emerging Schemes

- 3.8.20 In terms of Council strategies for Prescott, a Town Centre Masterplan was prepared in 2016 which set out a range of measures to address the decline of the town centre and make it a more attractive destination for local residents and visitors. These measures included, amongst other things:
- Growing the leisure sector to provide an improved visitor offer and develop a more diverse evening economy;

- Consolidating the town centre's retail offer by focusing activity and footfall in key locations, supporting independent retailers and exploiting the opportunities provided by new leisure development;
- Restoring and enhancing the town centre environment to showcase Prescot's heritage assets;
- Encouraging residential development in the town centre as a means to regenerate key sites and support local shops and services; and,
- Increasing the prominence and accessibility of the town centre so that it provides an attractive and convenient destination for visitors.

3.8.21 The masterplan identifies a number of potential development sites within Prescot town centre, the most significant of which is land at Mill Street West. The document states that this site is earmarked for a new landmark theatre development that would meet the aspirations of the Shakespeare North Trust. It continues that the theatre would include educational facilities and ancillary food and drink uses.

3.8.22 In November 2017, planning permission was granted for the Shakespearian theatre development envisaged by the town centre masterplan. The 'Shakespeare North Playhouse' represents a reproduction of a 350 seat Jacobean theatre. It will also include education facilities, a studio theatre, exhibition area, café / bar and outdoor spaces. Construction is underway and nearing completion. and it is envisaged that the new Playhouse will be completed in Summer 2022.

3.8.23 In July 2019, Prescot was announced as a beneficiary of funds from the Combined Authority to put towards town centre improvements, with up to £1m being granted to each constituent Local Authority. Specific measures outlined for Prescot include developing an event strategy and delivery programme which drives interest and attraction to the centre, commissioning a marketing and promotion plan, develop a

business grant offer, improving the visitor experience and evening economy, and a range of other high street initiatives.

Conclusions

- 3.8.24 In conclusion, the Council's retail evidence base suggests that Prescott is a town centre which has faced a number of challenges over the early 2000's. Of greatest significance was a withdrawal of national multiple retail operators (particularly from Prescott Shopping Centre), which had left the town centre with a high vacancy rate and no real 'anchor' retailer. Added to this was a weak leisure and evening economy, which again suffered from the lack of a major attraction to draw in visitors to Prescott.
- 3.8.25 These issues resulted in the centre suffering from a relatively weak vitality and viability, and this is reflected in its current VENUESCORE – which is the lowest of all defined town centres in the City Region at the present time. Accordingly, whilst Prescott appears to be meeting the day-to-day needs of the town's relatively localised catchment area as a 'service centre', it does not presently draw in visitors from beyond.
- 3.8.26 It should be noted that the Council's retail evidence base for Prescott is now very dated in light of the significant interventions made in Prescott since 2013 and the most up to date VENUESCORE data itself is from 2016/17.
- 3.8.27 Knowsley Council has taken active steps to change the town centre's fortunes. More than £12 million funding was secured through the THI and Combined Authority for public realm improvements and most of the work has now been completed. A masterplan for Prescott was adopted in 2016. This has paved the way for the bulk of the investment mentioned above as well as further significant investment, for the development of the Shakespeare North Playhouse.

3.8.28 The latter was granted planning permission in late 2017 and is currently nearing completion. Along with improvements to the street scene and to connectivity, the theatre will provide a step-change in the town centre’s leisure offer, increasing visitor numbers and no doubt attracting investment in the centre’s evening economy. It is hoped that the implementation of the masterplan, led by Shakespeare North, will have a transformative effect on the centre and will thus underpin its future vitality and viability.

3.9 Southport

Characteristics and Offer

3.9.1 Southport is the principal town in Sefton and is located in the northern area of the Liverpool City Region, approximately 33.0km to the north of Liverpool city centre. Southport historically developed as a seaside resort from the Victorian period onwards. The town centre is focused on Lord Street, Chapel Street and Eastbank Street. Lord Street has an array of Victorian era buildings with unique canopies along their frontages.

3.9.2 Southport also contains a significant amount of leisure and tourist attractions within and close to the town centre, such as the Pleasureland Theme Park and the Pier, alongside hosting major events such as the Southport Air Show. Attractions and events such as these, may attract visitors from outside the northwest of England and internationally for extended periods of time.

Diversity of Uses

3.9.3 The health check undertaken as part of the Sefton Retail Strategy Review (2021) identified that Southport contained a total of 757 retail units and approximately 158,070sq.m retail floorspace – this is the second highest amount of units and overall retail floorspace in the City Region, behind Liverpool.

Table 3.8 – Diversity of Use: Southport Town Centre

Use	Percentage of Outlets (Southport)	Percentage of Outlets (UK Average – 2020)
Convenience Retailing	7.0%	9.2%
Comparison Retailing	26.3%	28.2%
Retail Service	13.9%	15.4%
Leisure Service	25.1%	24.5%
Financial and Business Services	7.3%	9.5%
Vacant	20.5%	13.0%
Total	100%	100%

Source: Sefton Retail Strategy Review 2021 and Experian Goad average proportion of unit data for 2020.

3.9.4 The diversity of use analysis indicates that there was a below average representation of convenience, comparison, retail service and financial and business services in Southport. It also identified an above average representation in leisure services.

3.9.5 The health check carried out to inform the 2021 Retail Strategy Review noted there was a number of anchor comparison units present in the centre, largely clustered on Chapel Street, including Primark, TK Maxx and Next.

3.9.6 The health check also noted a significant number of restaurants, cafes, amusement centres, pubs and hotels which is reflective of Southport’s role and character as a seaside resort and tourist destination.

Retailer & Leisure Representation

3.9.7 The health check undertaken to inform the Council’s Retail Study Review determined Southport had a strong national multiple retailer presence, with major brands such as Boots, Argos, Primark and Next located in the town centre. The health check noted a loss in the range of major retailers present in the centre, noting a particular contraction in national comparison goods retailers.

- 3.9.8 Looking at the list produced by Experian Goad; Southport town centre contains 24 of the top 28 national comparison retailers – the second highest amount in the City Region only to Liverpool. This indicates Southport has a strong comparison retail offer and draw.
- 3.9.9 Given Southport’s history as a seaside town, there is a significant amount of leisure and recreational facilities, adjacent and in close proximity to the town centre. Major attractions include Southport Pleasureland Theme Park, Dune Splash World Water Park, Southport Eco Centre, Silcock’s Funland & Pier, the Atkinson Arts Centre and others. We note that there are a significant number of hotels and B&B’s present in Southport which gives a further indication to its status as a leisure destination for people in the regional area and beyond.

Vacancy Rates

- 3.9.10 The number of vacant units was observed as being 20.5% of the overall total and the amount of vacant floorspace was calculated as being 18.8% of the overall amounts. This is compared to national averages of 13.0% and 12.5% respectively at the time. This has increased since the previous study.

Accessibility

- 3.9.11 Southport was considered to be well connected to the strategic highway network, with the A565 radiating out to the north and south, and the A570 to the east. The town centre is also served by a significant number of car parks and on-street parking is also available in some sections of the town centre. The health check notes that the quality and location of some of the car parks is not ideal.
- 3.9.12 Public transport provision in the town centre is considered as being good, with the railway station located on Chapel Street and several bus stalls and stands along Lord Street and Eastbank Street with frequent services towards Preston, Liverpool and

other destinations within Sefton and West Lancashire. Train services connect the centre to Liverpool, Manchester, Preston, Wigan and Leeds.

- 3.9.13 Pedestrian accessibility and connectivity in the town centre has been assessed as good, with Chapel Street being pedestrianised. Southport has also been granted 'Cycling Town' status and has benefitted from investment from Government funding to develop cycling infrastructure, the health check considers further opportunities exist to improve cycling accessibility.

Environmental Quality

- 3.9.14 Southport's environmental quality was considered to be of a good to high quality, particularly along Chapel Street and Lord Street. The open spaces which line Lord Street ensure a high quality environment which provides an attractive setting for users. The rich historic environment of the town centre is recognised by the designation of Lord Street and the Promenade area as Conservation Areas. Chapel Street is noted as having a more conventional high street appearance with well maintained shop fronts.
- 3.9.15 The health check noted the varying level of maintenance of the canopies along Lord Street, and some lower quality shop / businesses frontages, which detract from its grandeur and overall quality.

VENUESCORE

- 3.9.16 The latest VENUESCORE data (2016/17) places Southport at the 104th strongest position in the UK. This represented a fall of four places between the 2015/16 edition of the database and the 2016/17 edition – the latest available.
- 3.9.17 In the context of the City Region's 16 defined town/city centres, this ranking places Southport in 2nd position within the City Region. Based upon its score, the VENUESCORE ranking notes Southport as being of regional significance.

Strategies and Emerging Schemes

- 3.9.18 The town centre is covered by Southport Business Improvement District (BID), which arranges a series of events, clean up and beautification schemes throughout the year.
- 3.9.19 In July 2019, the Combined Authority confirmed that Southport would be the beneficiary of funding from their town centre scheme, with up to £1m being granted to each of the constituent Local Authorities. Specifically for Southport, this funding is intended to be used to help repurpose and develop Southport Market, broaden the town centre offer to a wider audience, enhance the quality and strengthen linkages between the town centre and seafront, reduce the number of vacant properties, repair and reinstate historic features, improve the appearance of the town centre and create a sense of place, build upon and enhance local partnerships such as the Southport BID and Hoteliers Group as well as other initiatives.
- 3.9.20 Southport is a recipient of £37.5m in funding from Central Government Towns Fund. The funding is intended to create 1,000 jobs and an extra 1 million visitors per year³¹. The funding is earmarked to deliver a range of facilities to strengthen Southport's visitor economy and improve the physical environment. This includes a new events centre, an external visual arts attraction and digital / new business incubator spaces.
- 3.9.21 Firm proposals to revamp Southport Market and deliver a new water sports centre have also secured funding, with works to the former beginning in October 2020. A further £1million to improve the public realm on Scarisbrick Street were unveiled in November 2020 and are expected to be complete by Summer 2022.

³¹ <https://www.sefton.gov.uk/miscellaneous-pages/southport-town-deal/>

3.9.22 There are also plans to upgrade the railway links to Liverpool Moorfields to increase the capacity of the line and introduce modern and additional trains. These upgrades are currently underway.

Conclusion

3.9.23 Southport is the second largest centre in the City Region and has historically grown and expanded as a tourist and seaside destination. This role appears to have been retained and is demonstrated through the above average representation of leisure services, namely hotels, cafes and restaurants, and comparison uses. The audit also determined the presence of 24 out of the top 28 national comparison retailers in the centre, which is an indication of the centre's appeal and draw. The VENUESCORE rank indicates that Southport is a strong town centre and classifies it as being of 'regional' significance.

3.9.24 The centre is highly accessible by various transport options which are set to improve in the medium term. Whilst the centre has a good historic aesthetic and quality, there are issues surrounding the maintenance of some areas which the Council are seeking to address. The granting of Government funding means future improvements to the town centre are expected in the medium and long term.

3.9.25 Despite the vacancy rates, Southport is considered to be a strong town centre which fulfils the function as the principal centre in Sefton and also acts as a major leisure and tourism destination for the City Region and north west, as demonstrated by the prevalence of major attractions and strong comparison offer. The leisure offer is diverse, and we would consider this to cater to day trippers and people seeking more extended stays.

3.9.26 Overall, this audit suggests that Southport is a high-ranking centre within the City Region and is of significance at the local, City Region, and wider regional level. This sets it apart from many of the sub-region's other town centres.

3.10 Bootle

Characteristics and Offer

3.10.1 Bootle, whilst being located within and being the second largest retail centre in Sefton, forms part of the Liverpool urban area and is located approximately 5km north of Liverpool City Centre. The town centre is formed around the Strand Shopping Centre, an indoor shopping mall, with further retail uses located along Stanley Road and Marsh Lane.

3.10.2 Bootle town centre serves the role of an important shopping destination for the southern area of Sefton and adjacent parts of Liverpool. There is also a substantial amount of offices within and in proximity to the town centre, indicating it functions as a commercial employment area.

Diversity of Uses

3.10.3 The health check undertaken as part of the 2021 Retail Strategy Review identified 198 units in Bootle town centre, equating to approximately 50,960 sq.m of retail floorspace, which is a small decrease from the previous retail study. The proportional breakdown of the different floorspace uses in the town centre are summarised in Table 3.9 below:

Table 3.9 – Diversity of Use: Bootle Town Centre

Use	Percentage of Outlets (Bootle)	Percentage of Outlets (UK Average – 2020)
Convenience Retailing	8.1%	9.2%
Comparison Retailing	30.3%	28.2%
Retail Service	15.2%	15.4%
Leisure Service	14.6%	24.5%
Financial and Business Services	8.6%	9.5%
Vacant	23.2%	13.0%
Total	100%	100%

Source: Sefton Retail Strategy Review 2021 and Experian Goad average proportion of unit data for 2020.

- 3.10.4 The above indicates that Bootle's role is that of a comparison and service centre, supported by convenience uses.
- 3.10.5 Convenience uses present included major supermarkets such as Asda, Lidl and Aldi. Financial services included major retail banks such as Barclays, Nationwide Building Society and Santander.
- 3.10.6 The proximity and ease of access to Liverpool City Centre may give an indication as to the reasons for the below average financial services and significantly below average leisure uses – particularly given the significant amount of cultural and tourist attractions in Liverpool City Centre.

Retailer & Leisure Representation

- 3.10.7 Bootle town centre contains a significant number of national brands. The centre's convenience offer is anchored by Asda, Aldi and Lidl which are generally located around the periphery of the defined town centre boundaries.
- 3.10.8 There is no department store present in Bootle town centre, however there are major comparison retailers present such as TJ Hughes, Boots, Argos, Home Bargains and others. Comparison uses are focused within The Strand Shopping Centre and are considered to be more discount focused.
- 3.10.9 There is also a concentration of financial institutions present including Nationwide, Santander, TSB, Natwest, Barclays and others. The Strand Shopping Centre also has a Post Office branch present.
- 3.10.10 Comparing the retailers present in the centre to the top 28 comparison retailers as defined by Experian Goad, Bootle contains 7 of the named retailers. This is a below average representation when compared to the other centres being audited.

3.10.11 In terms of retail, the town centre contains several pubs / bars along with a large bingo hall. Bootle Leisure centre is located adjacent to the north of the town centre off Washington Parade.

Vacancies

3.10.12 Bootle was observed as having a significantly higher proportion of vacant units (23.2%) when compared to the national average (13.0%), the amount of vacant floorspace observed (17.6%) was also slightly above the national average. Vacancy rates have increased since the last survey. The vacant units were found to be concentrated within The Strand Shopping Centre. The health check noted that the vacant units around the Hexagon (inside The Strand) were under alteration at the time of survey.

Accessibility

3.10.13 Bootle town centre is well connected to the local and strategic highways network. The New Strand Centre has its own self-contained car park, other car parks are located off Delaware Road and each of the supermarkets has their own car parking facilities.

3.10.14 Bootle town centre was considered to be highly accessible by public transport. Bootle New Strand station is located a short distance from the Strand Centre which has frequent services towards Liverpool, Southport and other stations on the Merseyrail network. Whilst being close to the centre, the route to the station was found to be indirect and requires users to cross busy roads. The Strand Shopping Centre has a large bus station which has services towards destinations in Sefton and within the City Region.

3.10.15 The Strand Shopping Centre is a covered and wholly pedestrianised shopping mall allowing for convenient access to the majority of the centre's services and shops. The units on Stanley Road are all in close proximity to one another and the street

is considered useable for pedestrians and those with access issues. There are pedestrian access issues identified along the Washington Parade side of the Strand Shopping Centre, with the lack of active frontages potentially deterring pedestrians and the safety rails acting as a physical barrier to their movement.

3.10.16 Cycle parking and storage is available in the centre but there are no cycle lanes along the key routes.

Environmental Quality

3.10.17 The health check found the environmental quality to be functional but reasonable, with little interesting features or distinctive character. The Strand is noted as being well maintained but very inward looking with limited relationship with the wider town centre.

3.10.18 The concentration of vacant units also detracted from the overall quality of the centre. The Strand itself is considered to be dated in appearance and would benefit from cosmetic improvements.

3.10.19 Units along Stanley Road have a positive frontage and have benefitted from recent planting and public realm enhancements. These improvements, as well as several other recent developments, have a positive impact on the environmental quality.

VENUESCORE

3.10.20 The latest VENUESCORE data (2016/17) places Bootle town centre in the 289th strongest position in the UK. This was an increase of eight places between the 2015/16 edition of the database and the 2016/17 edition – the latest available.

3.10.21 In the context of the City Region's 16 defined town/city centres, this ranking places Bootle in 5th place within the City Region. Based upon its score, the VENUESCORE ranking notes Bootle as being of sub-regional significance.

Strategies and Emerging Schemes

- 3.10.22 Sefton Council has prepared a Town Centre Investment Framework (adopted in August 2016) for Bootle. The document establishes a strategic vision for Bootle town centre along with setting out several regeneration priorities / development plots for the area, including public realm enhancements.
- 3.10.23 The Council is in the process of preparing an Area Action Plan for Bootle which will set out a new 20-year plan for the town. The plan is at a relatively early stage in its development.
- 3.10.24 It is understood the Council purchased The Strand Centre in 2017 and announced a £3.15m investment programme to improve the shopper's experience. The Combined Authority has granted approximately £1.65m towards the purchase and revitalisation of the Strand and the area in the vicinity.
- 3.10.25 Bootle Canalside is a temporary scheme located adjacent to the Strand Centre, along the alignment of the Leeds-Liverpool Canal. The scheme was granted planning permission August 2021 for five years and includes multi-functional spaces, including events spaces, landscaping and 22 shipping containers which will be occupied by food and drink vendors – which we understand have mostly been occupied at the time of writing.
- 3.10.26 Bootle is also set to be the recipient of a grant from the Combined Authority's Town Centre fund which will specifically be put towards town centre diversification schemes, developing a stakeholder engagement plan and programme for Bootle town centre, and further exploring how to develop a healthier town centre.
- 3.10.27 The Council have confirmed they are exploring the granting of an Article 4 direction which would remove permitted development rights with Bootle town centre in order to ensure the delivery of the Area Action Plan.

Conclusion

3.10.28 Bootle is considered as being of mixed, but improving, fortune. The centre benefits from good accessibility and has a concentration of major national brands present. The centre serves the daily needs and key convenience retail service functions of the residents of Bootle and south Sefton. It also serves the comparison needs of Bootle and the areas adjacent in both Sefton and Liverpool, however the composition of comparison retailers in Bootle is generally budget or lower end quality goods.

3.10.29 The managed environment of the Strand Centre is noted as allowing the centre to perform moderately with respect to environmental quality, accessibility and perceptions of safety. The Strand's closing time of 6pm is noted as a constraint for the night time economy. Whilst it is noted that vacancy rates have not raised significantly, there is work to do to ensure the long-term viability and vitality of the centre.

3.11 St Helens

Characteristics and Offer

3.11.1 St Helens is located in the eastern part of the City Region and is the principal retail and commercial centre in the St Helens Borough. The focus of retail activity in St Helens is along the pedestrianised area of Church Street, Church Square, Market Street, Barrow Street and Hardshaw Street. The town centre also contains two shopping centres; Church Square Shopping Centre, which comprises of Palatine Arcade and Lagrange Arcade, and the Hardshaw Centre.

3.11.2 St Helens college and St Helens University Centre, two large sized education institutions, are located within the town centre boundary and attract large numbers of students to the town centre during term times. The centre contains a significant amount of civic and community uses such as a Library, health centre and Council

Offices. There are also a number of tourist attractions in the town centre which draw tourists in from the surrounding areas as well as from a wider sub-regional area. Collectively these institutions and facilities act not only as major employers but also as draws to St Helens from within the Borough and beyond.

3.11.3 A review of the VENUESCORE ranks has found that St Helens has a score of 138 and a rank of 173 – making St Helens the fourth highest ranking centre in the City Region and the 18th highest in North West England. VENUESCORE has also classified St Helens as a ‘Regional’ town centre based on its score.

Diversity of Uses

3.11.4 The Retail Study published in May 2017 identified 443 units present in St Helens town centre, this is the third highest amount of retail units in the City Region. This equated to approximately 116,400 sq.m of retail floorspace. The proportional breakdown of the different floorspace uses in the town centre are summarised below.

Table 3.10 – Diversity of Use: St Helens Town Centre

Use	Percentage of Outlets (St Helens)	Percentage of Outlets (UK Average – 2016)
Convenience Retailing	9.9%	8.6%
Comparison Retailing	27.1%	32.0%
Retail Service	12.2%	13.9%
Leisure Service	24.2%	23.4%
Financial and Business Services	10.8%	10.6%
Vacant	15.8%	11.2%
Total	100%	100%

Source: St Helens Retail and Leisure Study 2017 and Experian Goad average proportion of unit data for 2016.

3.11.5 Convenience uses were noted as being mostly absent from the pedestrianised core of the town centre, with the most significant convenience units located on the centre’s periphery – these units tended to be supermarkets.

- 3.11.6 Despite being under represented in terms of number, the health check notes that there are a significant amount or large comparison units in the centre. 14 comparison units were over 1,000 sq.m in size and one of these was over 5,000sq.m in size. The health check concluded that the below average amount of comparison goods retailers was somewhat offset by the size of the units present.
- 3.11.7 Retail service uses were underrepresented in terms of amount; however, the health check notes the Lounge Salon, in the college is a large retail service unit complete with a hairdressers and spa which could compensate for the low representation.
- 3.11.8 Take-aways were noted as the most dominant leisure service use in the town centre along with a significant number of public houses and some restaurants and cafes. Large sized and national chain restaurants were noted around the cinema.
- 3.11.9 Financial and business services were above national average levels, indicating that St Helens is a banking and business centre. A significant clustering of financial services was noted at Hardshaw Street.

Retailer and Leisure Representation

- 3.11.10 St Helens was found to be catered by national multiple brands and independent traders. The town centre's convenience use is anchored by Asda and Lidl. St Marys Market is classified as a convenience use by the GOAD system, however it is recognised that the Market Hall sells other goods and services too.
- 3.11.11 Comparison goods in St Helens are generally concentrated around the pedestrianised core of the town centre and the Church Square Shopping Centre. Comparison retailers with a presence in the town centre include The Range, H&M, River Island, Pandora Jewellery and New Look.
- 3.11.12 Retail services were primarily composed of health and beauty salons and were found to be generally dispersed throughout the centre. Major brands present include the Post Office, Specsavers Opticians and Boots.

3.11.13 Leisure services were found to be more concentrated in the western section of the town centre, around the College and University Centre. The leisure provision comprises a bingo hall, a cinema, gymnasiums, and a hotel. It is noted that there are a number of public houses and bars in St Helens, indicating that there is an active night time economy. There are several major food and drink located around and near to the cinema. Whilst these facilities were noted, it was considered at the time that further development of the night time economy should be explored.

3.11.14 Financial services consisted of high street banks and building societies and also included estate agents, legal services and financial service providers. There was also a noticeable clustering of financial services along Hardshaw Street.

3.11.15 St Helens town centre contains a number of leisure attractions such as the World of Glass Museum, the North West Museum of Transport, the Citadel Arts Centre and St Helens Theatre Royal. Some of these attractions are unique to the City Region and wider sub-regional area and may attract tourists from a wider catchment.

3.11.16 13 of the top 28 national comparison brands as defined by Experian Goad had a presence in the town centre, which is an above average amount when compared to other centres in the City Region.

Vacancy Rates

3.11.17 The 2016 retail study identified 70 vacant units – this represented 15.8% of the total units present and 8.9% of the overall floorspace. The respective national averages at the time were 11.2% and 9.0%, which therefore means St Helens had an above average vacancy rate.

Accessibility

3.11.18 St Helens is well connected to the strategic highways network, with several arterial routes connecting the town centre to the East Lancashire Road (A580), the M62 and

the M6. The town centre is well served by car parks, with the Council operating a total of 13.

3.11.19 Regarding public transport, St Helens railway station is located within the town centre off Corporation Street, with frequent connections to Liverpool, Blackpool and Wigan.

3.11.20 For active travel, cycle stands were observed throughout the town centre along the streets and within the car parks. It is noted that the Council have developed six cycling hubs in the Borough to act as a community resource and promote cycling throughout the area.

3.11.21 The main retail core of the town centre was pedestrianised, allowing for the free and safe flow of pedestrians. Additionally, the Church Square Centre and Hardshaw Centre are covered malls allowing for all-weather shopping to occur. In non-pedestrianised areas, ample crossing points were provided to allow for the safe crossing and flow of pedestrians.

Environmental Quality

3.11.22 The health check carried out as part of the Council's 2017 Retail Study considered the general environmental quality of the main retail core to be very good. It was noted that the area had only recently been pedestrianised and that this had allowed for additional space to incorporate attractive public realm enhancements and planting schemes. The area was also noted as having ample public seating, street lighting and high-quality frontages. It was also noted that the area had been regenerated with an attractive paving scheme.

3.11.23 The St Helens health check noted that peripheral streets outside of the main retail core had a weaker environmental quality, with parts of Ormskirk Street and Duke Street specified as having poorer quality frontages, clusters of vacant units and having a dilapidated appearance.

VENUESCORE

3.11.24 The latest VENUESCORE data (2016/17) places St Helens at 173rd strongest position in the UK. This saw a fall of seven places between the 2015/16 edition of the database and the 2016/17 edition – the latest available.

3.11.25 In the context of the City Region's 16 defined town/city centres, this ranking places St Helens in 4th position within the City Region. Based upon its score, the VENUESCORE ranking notes St Helens as being of regional significance.

Strategies and Emerging Schemes

3.11.26 The Council published the St Helens Town Centre Strategy in October 2017. The document sets out the Council's ambition to take more control in shaping the future of St Helens town centre and set out a £300m transformation vision which seeks to rejuvenate the town centre, whilst looking after all the aspects that make St Helens unique. The document divides the town centre into quarters and sets out a series of strategic goals and interventions for each which are intended to be rolled out over the next decade to improve the town centre. It is understood that the Council purchased the Church Square Shopping Centre in October 2017, to help realise the strategies in the regeneration document.

3.11.27 In July 2019, St Helens was announced as one of several towns which would receive funding from the Combined Authority, with up to £1m being granted per constituent Local Authority. The funding is set to be put towards helping develop a town centre masterplan (which has been completed), providing public art schemes, the development of a scheme which would encourage the creative use of shop fronts, the introduction of a 'Town Centre Team' and to identify key / priority areas for business growth through measures such as business rates reductions and improvement grants.

3.11.28 In partnership with the English Cities Fund, the Council is bringing forward a £200m plan to transform St Helens town centre over the next twenty years. A draft Masterplan Development Framework was published in November 2021. The document sets out a vision for the future development of the town centre, which is set to include a new market, park area, hotel, a new/redesigned bus station, and a masterplan to set out a spatial framework for the implementation of the vision and strategic objectives. Planning proposals relating to the future regeneration of the centre are anticipated to be submitted in early-mid 2022.

3.11.29 The Council have partnered with Glass Futures to deliver a centre of excellence and innovation in glass production. The facility is proposed to be located close to the Totally Wicked Stadium (on the periphery of the town centre) and, whilst the project is not specifically retail or main town centre development, its proximity to the town centre and its being highlighting as a key project in the city regions post-covid economic recovery means it could have positive impacts on the town centre.

3.11.30 In July 2021, St Helens was confirmed as being a recipient of £25m in funding from the Government's Town Deal scheme. This funding is earmarked to help deliver the second phase of the Glass Futures scheme, the development of a new bus station as well as other active transport improvements, the development of a youth and community zone, digital connectivity improvements and residential development

Conclusion

3.11.31 St Helens has the 4th highest rank in the City Region in terms of its VENUESCORE ranking, and the third highest amount of retail units. The centre seemingly acts as a leisure and financial centre as is apparent from the higher than national average representation. Even though the proportion of convenience and comparison units in the centre is below national averages, the amount of floorspace is higher than the respective national averages. These are strong indications the centre performs a role beyond that of meeting purely the needs of its immediate population.

3.11.32 The presence of the higher education institutions is considered to be highly beneficial and draws younger demographics into the centre. There are also several unique attractions which potentially draw tourists to the centre from a wider regional catchment.

3.11.33 The future plans for the town centre, and in the periphery, will help secure its long term vitality and viability.

3.11.34 Overall, it is considered that St Helens functions as a strong and high-ranking town centre, acting as the primary centre for the eastern part of the City Region, and also containing facilities which could have a wider regional draw.

3.12 Earlestown

Characteristics and Offer

3.12.1 Earlestown forms part of the wider settlement of Newton-le-Willows, which is located on the eastern edge of the St Helens Borough. It is approximately 7km to the east of St Helens and 31km to the east of Liverpool city centre. The town centre is focused along Market Street and Bridge Street.

3.12.2 The town centre is mostly comprised of small, terraced units with a large Tesco Superstore and Wilko unit on the northern periphery. There is also a market which is held on Fridays (traditional retail market) and Saturdays (flea market and car boot sale).

3.12.3 Key facilities in the centre also include Council Offices and a Post Office. The centre is small in size, does not contain a large number of national multiple brands and is generally geared towards catering to the daily needs of the local population.

Diversity of Uses

3.12.4 The Retail Study published in May 2017 found 127 units present in Earlestown town centre. This equated to approximately 21,300 sq.m of retail floorspace. The proportional breakdown of the different floorspace uses in the town centre are summarised below:

Table 3.11 – Diversity of Use: Earlestown Town Centre

Use	Percentage of Outlets (Earlestown)	Percentage of Outlets (UK Average – 2016)
Convenience Retailing	6.3%	8.6%
Comparison Retailing	25.2%	32.0%
Retail Service	22.2%	13.9%
Leisure Service	28.3%	23.4%
Financial and Business Services	6.3%	10.6%
Vacant	11.7%	11.2%
Total	100%	100%

Source: St Helens Retail and Leisure Study 2017 and Experian Goad average proportion of unit data for 2016.

3.12.5 The diversity of use analysis indicates that Earlestown acts as a retail and leisure service destination. Whilst the amount of convenience units is lower than the national average, the health check indicates that the amount of convenience floorspace is significantly higher than the national average and is mostly attributed to the presence of Tesco.

3.12.6 Given the size of the centre compared to nearby St Helens, or to centres which are within easy access, it was considered that comparison retailers were opting to locate elsewhere. The health check also considered the supply of small sized retail units would be unattractive and unable to accommodate big brand retailers. There are some major comparison brands present such as Wilko and Home Bargains, however, these typically offer lower end comparison goods.

3.12.7 The majority of retail service units were noted as being hairdressers or beauty salons, which are considered to be readily able to accommodate small sized uses when compared to other occupier types. Most of the leisure service units identified in the centre were take-aways and were generally located on the periphery.

3.12.8 The presence of financial and business service uses in Earlestown was above the national average and was considered to be diverse for a centre of its size; being comprised of retail banks, accountants, estate agents, solicitors and others.

Retailer and Leisure Representation

3.12.9 The surveys noted that national brands were not particularly well represented in the centre, identifying it as a key weakness. That being said, major names in the centre include, Wetherspoons, Lloyds Bank, Wilkos and Home Bargains. Wilkos is the only retailer in the centre which is included within Experian Goad's top 28 comparison retailer list.

Vacancy Rates

3.12.10 Vacant units were found to comprise 11.8% of the centre's unit stock and 5.4% of the overall floorspace. This was broadly in line with the national average amount of vacant units at the time (11.2%) and below the national average for floorspace (9.0%).

Accessibility

3.12.11 Earlestown was considered to be well connected to the strategic highway network and the centre was considered to have good car parking provision across the town centre, which is free for users. Roads within and around the centre are a one-way system which help the flow of traffic through.

3.12.12 Earlestown railway station is located at the southern end of the town centre with regular trains to Liverpool, Manchester, Chester and North Wales. There are several

bus stops throughout the centre and there is a bus station located on Lord Street. Bus services extend out towards St Helens and Warrington.

3.12.13 In terms of pedestrian connectivity, the centre is surrounded by residential uses and the streets were considered walkable. The pedestrianised area in the centre greatly contributes to pedestrian connectivity and safety. For cycling, there are no dedicated routes in the centre, but cycle parking facilities were observed in several locations throughout.

Environmental Quality

3.12.14 The environmental quality was considered to be varied across the centre. Market Street is a pedestrianised zone where it was noted efforts had been made to keep the area maintained and attractive for users. The shop frontages along Market street were considered to be that of a traditional high street, with the aesthetics, contribution and quality varying between units. Trees and seasonal planting were observed which make a positive contribution to the general environmental quality. Units located on Earle Street and Cross Lane were considered to be poor.

3.12.15 Overall, the environmental quality of the centre was considered as being reasonable but in need of improvements, such as via investment schemes / providing grants to improve frontages.

VENUESCORE

3.12.16 The latest VENUESCORE Shopping Centre Index (2016/17) positions Earlestown town centre as the 1,325th strongest individual shopping centre in the UK. In the context of the City Region's 16 defined town/city centres, this places Earlestown in 12th position. The VENUESCORE ranking suggests that Earlestown town centre is a shopping destination of no more than local significance, which serves the day-to-day needs of the surrounding area.

Strategies and Emerging Schemes

3.12.17 The Combined Authority have granted funding to ten town centres in the city region, including Earlestown, from a £6m pot, with up to £1m being given to each constituent Local Authority. Whilst the final share of the funding for Earlestown is not available, information provided by the Combined Authority states that this funding is intended to be used to contribute towards public art schemes, contribute towards a masterplan /delivery plan, develop a scheme to encourage creative use of shopfronts and to help identify key priority area(s) in the town centre to promote business growth through business rate reductions, improvement grants and explore the potential for establishing a BID.

3.12.18 The Council have partnered with the English Cities Fund to develop plans to regenerate Earlestown town centre. They have produced a draft Masterplan Development Framework for the which will guide its future development and transformation. The Masterplan Framework sets out a strategic vision for the town centre and includes specific ambitions to improve the public realm, re-opening the town hall, improving access to the train station and creating a new transport hub. It is intended that a planning application to begin the regeneration works will be submitted in early-mid 2022.

Conclusion

3.12.19 Earlestown is considered to have a reasonable provision of goods and services for a centre of its size and caters for the daily needs of the surrounding community. The centre is considered to be highly accessible from the surrounding suburbs.

3.12.20 The town centre is considered to be poorly represented by national multiples and the high supply and provision of small-scale units coupled with the lack of larger format units reduces the centre's ability to accommodate additional national retailers. The VENUESCORE ranking also suggests that Earlestown caters predominantly for local needs.

3.12.21 Overall, this audit considers Earlestown to be a vital and viable town centre but, given that it is generally oriented towards catering for the daily needs of the local population, it is weaker (in terms of its offer) than the other centres being considered in this audit.

3.13 Birkenhead

Characteristics and Offer

3.13.1 Birkenhead town centre is located on the Wirral Peninsula along the western bank of the River Mersey, opposite the city of Liverpool (which lies approximately 7km to the west). Ellesmere Port and Chester are located approximately 17km and 29km respectively to the south-east of Birkenhead.

3.13.2 The core retailing area within Birkenhead town centre covers Oliver Street, Grange Road, Princess Pavement, Borough Pavement and Milton Pavement. There are also two covered shopping precincts within the town centre, the original Grange Precinct and the Pyramids shopping centre. These facilities are now under common ownership and are marketed simply as the 'Pyramids'. The units within the Pyramids are largely modern in format and capable of accommodating national multiples. However, a significant recent loss was House of Fraser, who vacated one of the centre's most prominent units in March 2020.

3.13.3 Birkenhead covered market, which contains some 250 stalls, lies at the heart of the shopping area within the town centre – with the Pyramids' covered precincts surrounding on three sides. The market offers a wide range of fresh produce, non-food goods, and accommodates internal cafes / eateries. It is evidently a popular and well utilised feature of the town centre and draws custom from a relatively wide catchment area (including North Wales).

3.13.4 Alongside its retail offer, Birkenhead benefits from a sizable leisure centre and Vue multiplex cinema immediately north of the town centre, whilst a large Mecca Bingo

is located more centrally at Europa Square. However, restaurant provision in the town centre is more limited and those that are available are focussed upon meeting shoppers needs, as opposed to furthering the centre’s night time economy. Past health checks of the centre have confirmed that this leisure sector is relatively weak.

Diversity of Use

3.13.5 In terms of the composition of Birkenhead town centre, health checks were undertaken in July 2019 to inform an updated retail study, the checks determined that Birkenhead contained a total of 480 retail units and 158,356sqm of retail floorspace.. This is a substantial increase from the total amount of units recorded in the previous study in 2015 (230 units) however the surveys are not directly comparable as the 2015 survey excluded the Argyle Street / Hamilton Square area. No floorspace figure was recorded for the 2015 study. The table below shows the proportional split of outlets in percentage terms across retail, leisure and commercial sectors. It also identifies the centre’s vacancy rate, as recorded in 2015.

Table 3.12 – Diversity of Use: Birkenhead Town Centre

Use	Percentage of Outlets (Birkenhead)	Percentage of Outlets (UK Average – 2019)
Convenience Retailing	6.7%	9.2%
Comparison Retailing	25.2%	29.6%
Retail Service	12.9%	15.0%
Leisure Service	19.4%	24.4%
Financial and Business Services	11.7%	9.9%
Vacant	24.2%	11.7%
Total	100%	100%

Source: Vitality & Viability Health Check Assessments – Birkenhead (2019)). Experian Goad, UK Average Figures May 2019

3.13.6 The diversity of use analysis undertaken as part of the Council’s 2019 health check identified that comparison goods retailing was the strongest sector in Birkenhead town centre at that time, equating to 25.2% of units – This was below the national

average of 29.6%. Whilst the proportion of comparison units in Birkenhead town centre has contracted when compared to the 2015 survey (43.9%), it is pertinent to note that the survey area for the 2019 study was larger than the 2015 survey area. It is also relevant to note that the overall number of comparison units have increased from 101 units in 2015 to 121 units in 2019. Whilst not captured in the above figures, the amount of floorspace which was recorded in comparison use was 49.1% of the overall total, which is markedly higher than the national average of 33.9%. Birkenhead's comparison offer indicates that its function goes beyond serving merely localised convenience retail and service needs, and that its role is more of a sub-regional one as a non-food shopping destination.

3.13.7 The health checks found below average representation of convenience, retail service and leisure services in Birkenhead, but it noted an above average representation of financial services. The lack of a strong and varied evening economy within the town centre is also identified as being a weakness, particularly with regards to restaurant provision.

Retailer and Leisure Representation

3.13.8 Birkenhead town centre contained 21 of the top 28 comparison goods retailers based on the most up to date Experian Goad list (November 2020), including House of Fraser, Argos, Next, TK Maxx and H&M amongst others. This confirms Birkenhead's success as a non-food shopping destination, with only Liverpool city centre and Southport town centre containing more of the UK's top comparison retailers (in the City Region).

3.13.9 Other major comparison goods retailers include Boots,, Game, H Samuel, JD, Regis and WH Smith. The centre benefits from an anchor convenience retail unit in the form of an 8,800 sq.m Asda superstore, alongside Iceland and Heron supermarkets. Finally, there are a number of national-multiple cafes and fast-food restaurants including; Costa, Café Nero, Wimpy, Burger King and McDonalds.

Vacancies

3.13.10 With regards street level vacancies, the 2019 Birkenhead health check report prepared by Wirral Council identified 116 vacant units in the centre, equating to 24.2% of the overall total. This was more than double the national average at the time of 11.7%. We understand this this higher than national average proportion of vacant units has been a persistent issue within Birkenhead. The health check also noted there were a significant number of vacant units within Birkenhead Indoor Market which were unable to be captured accurately due to limitations with the survey recording techniques.

3.13.11 A factor in this appears to be that there are a considerable number of smaller units (38 units less than 100sqm, 46 units between 100-200sqmbelow 250 sq.m) within the centre, and supply seems to be outstripping operator demand. However, there have also been high profile losses from some of the centre's larger units in recent years, most notably M&S vacating a prominent unit on St Johns Square in 2018 and House of Frazer closing down in March 2020.

Accessibility

3.13.12 Accessibility to Birkenhead town centre by car is straightforward and public transport linkages are good. The centre benefits from a modern, centrally located, covered bus station, and the town centre is also accessible by rail, being served by three stations, which all form part of the Merseyrail network. It is served by two multi-storey car parks offering approximately 1,200 spaces (700 at the Pyramids Centre and 500 at Grange Precinct) and various surface level car parks. Finally, the centre benefits from a sizable walk-in catchment and bike stands are also available throughout the centre, for those who wish to use this mode of transport.

Environmental Quality

- 3.13.13 The health check analysis of Birkenhead found that the environmental quality of the centre was generally poor. The Pyramid shopping centre was observed as being in a good condition but contained a proliferation of vacant units which impacted its overall quality. The exterior of the centre would benefit from modernisation.
- 3.13.14 The area around the Indoor Market was also noted as being in need of upkeep and repair, with imposing buildings and a utilitarian appearance.
- 3.13.15 The area around Hamilton Square was considered to be of a high architectural value, however the area between this area and Conway Street was found to be of a mixed to poor environmental quality due to the unit types and the large car parks.
- 3.13.16 A problem linked to the centre's lack of evening economy and residential uses is the fact that outside trading hours, the retail core is largely deserted – with the majority of shops shuttered. This results in an unattractive and unappealing environment for the public and represents an additional barrier in fostering the centre's evening economy.

VENUESCORE

- 3.13.17 The latest VENUESCORE data (2016/17) positions Birkenhead town centre as the 137th strongest individual shopping centre in the UK. It saw a rise in its rank of five places between the 2015/16 edition of the database and the 2016/17 edition – the latest available. In the context of the City Region, this ranking places Birkenhead third, behind only Liverpool and Southport. The VENUESCORE ranking represents important evidence that Birkenhead is a shopping destination of regional significance, which serves a densely populated catchment area largely focussed upon the Wirral peninsula.

Council Strategies and Emerging Schemes

3.13.18 In July 2018, Wirral Council in a joint venture with Muse Developments, revealed emerging plans for the part redevelopment of a 11 hectare area of the town centre, extending from the Pyramid Centre In the South to Europa Boulevard to the north. A hybrid application was approved in April 2021 which granted detailed permission for two office buildings with ground floor food and beverage uses (comprising 21,950sqm floorspace in total) in the area between the existing Indoor Market and St Johns Street, and outline permission for office uses, leisure uses (including the development of a new market hall / leisure building), a hotel, residential uses in the area to the north of Conway Park railway station, improvements to the bus station and infrastructure works to develop a new 'super-crossing' at Conway Street. The first part of these plans is currently underway, with demolition work occurring along Milton Pavements to accommodate offices. The entire redevelopment of the area is anticipated to take 15 years.

3.13.19 The Birkenhead Central Gateway Project will see the removal of two flyovers and adjustments to the highways network around the Birkenhead Central and Hind Street area to improve access to the town centre from the south and train station. The scheme has secured £8.3m form the Combined Authority to progress.

3.13.20 Plans are also being devised for the future of the former House of Fraser store. The site was purchased by the Council in December 2020 and is anticipated to be redeveloped into housing. funding was granted by the Combined Authority to allow this purchase, with the stipulation that a planning application has to be submitted by the end of September 2022

3.13.21 In July 2021, Birkenhead was confirmed to be the recipient of £25m of funding from the Government's Town Deal. The bid was supported by a Town Investment Plan, which set out a series of projects in the town centre which would benefit from funding and address a number of needs in Birkenhead – this includes accelerating

the brownfield-led regeneration programme, and delivering projects including a new wellbeing hub, linear park linking key areas in the town centre and the future Wirral Waters area, heritage-based visitor attractions and a creative hub along Argyle Street.

3.13.22 Plans are also being developed to develop a new public park on the former Dock Branch railway line, with the first section intended to be delivered being the area between Tower Road and Argyle Street. A public consultation on initial designs concluded in November 2021 and it is anticipated that the project will take 2-3 years to develop.

3.13.23 The Council also recently published a draft of the Birkenhead 2040 Framework, which sets out the vision and strategy for the future development of the town centre and periphery.

3.13.24 It is clear that the introduction of a commercial business district of the scale proposed would bring a different dimension to the town centre's offer, promoting it as a key employment location within the sub-region. The daily influx of workers would also potentially benefit other sectors, such as Birkenhead's food and beverage offer and the evening economy more widely. A modern market hall would represent a further anchor attraction, as would a new leisure complex. Accordingly, the significant investment proposed for Birkenhead will enhance its attraction as a key town centre within the City Region.

3.13.25 Adjacent to the north of the town centre is the Wirral Waters project, which is centred on the former docks at East and West Floats. The £4.5bn project intends to deliver 13,500 homes and potentially create up to 20,000 new jobs up to 2041. Due to the site's size, it is split into numerous sub-areas which are at varying stages of development. In July 2019, the Combined Authority granted £3m in funding to deliver grade A offices on a key site in the area, this development was completed in December 2021. Residential uses are also currently under construction at East

Float. Due to its scale and proximity to the Wirral Waters project, it is considered that it would have significant positive impacts on the town centre.

Conclusion

- 3.13.26 In conclusion, Birkenhead is one of Liverpool City Region's larger town centres, containing some 480 units and 158,500 sq.m of floorspace – based on data gathered from Wirral Council's retail evidence base. Comparison goods retailing is the strongest sector in Birkenhead town centre, equating to 25.2% of units).
- 3.13.27 Birkenhead town centre included 21 of the top 28 top comparison goods retailers according to the most up to date Experian Goad list from November 2020 including, Next, TK Maxx and H&M. Indeed, of the 16 town/city centres within the City Region, only Liverpool and Southport contained more of the UK's top comparison retailers based on the November 2020 data, emphasising Birkenhead's strength of attraction.
- 3.13.28 It is acknowledged that some of the top 28 high street retailers in the Experian data set now longer exist but this issue is consist for all the centres in the study. The closures of the M&S and House of Frazer will have weakened retail offer but none of the other centres in the study have a House of Frazer and St Helens town centre has also suffered from the closure of the anchor M&S in the town centre.
- 3.13.29 The latest VENUESCORE data identifies Birkenhead as the 137th strongest individual shopping centre in the UK. In the context of the City Region, only Liverpool and Southport occupy a higher rank.
- 3.13.30 Set against these positive attributes, the assessed data suggests that Birkenhead has a high vacancy rate, a mixed to poor environmental quality and weak evening economy. The centre's offer has evidently historically been skewed towards meeting non-food needs and this appears to be at the expense of other sectors. However, emerging redevelopment proposals will see the creation of a new commercial business district immediately north of the town centre's retail core. The influx of

workers that this will bring to the centre on a daily basis will no doubt help to attract evening economy uses, and in turn boost this sector. There are also large-scale regeneration schemes which are being progressed and prepared, some of which have received central funding to accelerate and ensure their delivery. These projects are intended to address identified deficiencies in the town centre.

3.13.31 In summary, our analysis identifies that Birkenhead town centre has a 'sub-regional' role in the context of the Liverpool City Region area, as an important comparison goods shopping destination. The forthcoming town centre expansion scheme looks set to add a different dimension to the centre's offer. The new office, leisure, retail and residential development will ensure that it maintains its role and function as a key centre within the City Region hierarchy.

3.14 Liscard (Wallasey)

Characteristics and Offer

3.14.1 Liscard town centre, Wallasey is located towards the north-eastern tip of the Wirral peninsula, approximately 5.0km north-west of Birkenhead Town Centre and 7.0km east of Liverpool City Centre. Retail and leisure provision is focussed on Seaview Road, Wallasey Road, Liscard Village and within the Cherry Tree Centre (a shopping precinct off Cherry Square). The town centre is linear in form and is largely comprised of traditional two and three storey terraced buildings. Anchor retailers include an Asda superstore at the northern end of the centre and national multiples such as Boots, Primark, B&M and Home Bargains on the pedestrianised Liscard Way.

Diversity of Use

3.14.2 With regards the structure of Liscard town centre, analysis undertaken as part of a Council conducted health check in July 2019 found that it contained a total of 296 units (an increase from 286 units recorded in the 2015 health checks) and 62,779sq.m of floorspace. The previous health checks in 2015 did not include an

assessment of floorspace, however we are aware that the 2009 Retail Study found this to be 48,420 sq.m. The table below shows the proportional split of outlets in percentage terms across retail, leisure and commercial sectors.

Table 3.13 – Diversity of Use: Liscard (Wallasey) Town Centre

Use	Percentage of Outlets (Liscard)	Percentage of Outlets (UK Average – 2019)
Convenience Retailing	8.1%	9.2%
Comparison Retailing	24.0%	29.6%
Retail Service	18.6%	15.0%
Leisure Service	19.6%	24.4%
Financial and Business Services	11.8%	9.9%
Vacant	17.9%	11.7%
Total	100%	100%

Source: Vitality & Viability Health Check Assessments – Liscard (2019). Experian Goad, UK Average Figures May 2019

3.14.3 The diversity of use analysis undertaken as part of the 2019 health check identified that comparison goods retailers occupied the majority of the units contained within Liscard town centre (23.7% or 71 units). However, this was still marginally below the equivalent national average in July 2019 of 29.6%. 8.3% of the units were occupied by convenience goods retailers, again a figure marginally below the national average. Leisure services in Liscard (19.0%) was also below the national average (24.4%). In contrast, the proportion of units occupied by retail services (19.7%) was well above the national average at the time of 15.0%, and financial services representation was also above the national average.

3.14.4 The diversity of use analysis implies that Liscard’s role is one largely serving local daily and some wider specialised needs, as evidenced by the above average proportion of retail service uses (hairdressers, beauticians, opticians, etc.), the above average proportion of financial and business services (estate agents, solicitors etc.) and the convenience sector being broadly in line with the national average. Added to this is the fact that the largest unit in the centre is an Asda superstore and

supermarkets including Heron, Iceland and Tesco are also present – implying that the centre is a regular destination for food shoppers.

- 3.14.5 It therefore appears that Liscard town centre is typically being used by those within the Wallasey area to meet day-to-day needs and some more specialised service needs, as opposed to functioning as a higher order, non-food focussed shopping destination serving a wider catchment area.

Retailer and Leisure Representation

- 3.14.6 Liscard town centre includes only 7 of the top 28 comparison goods retailers that are featured within Experian’s annual ‘top retailers’ list. This includes, amongst others, Primark, Boots, Wilkinson and Superdrug. There are also a number of national multiple comparison goods retailers within the centre, including: B&M Bargains, Home Bargains and Poundland. It is notable that the majority of these retailers are focussed upon the value end of the market.
- 3.14.7 The centre benefits from an anchor convenience retail unit in the form of an Asda superstore, alongside smaller Iceland, Heron and Tesco supermarkets. Finally, there are a number of national-multiple cafes and fast-food restaurants including; Costa, KFC, Subway and McDonalds.

Vacancies

- 3.14.8 With regards street level vacancies, the 2019 Liscard health check found that the proportion of vacant street level units within the centre was 19.0%. This was above the national average at the time of 11.7% (July 2019).
- 3.14.9 The vacant units were noted as being evenly distributed throughout the centre with noted concentrations along Seaview Road and the southern end of Liscard Walk. Whilst not included in the retail unit or floorspace counts, large vacant office buildings (former Council offices on Edgerton Grove and Dominic House on Albion Way) are present in the centre.

Accessibility

3.14.10 Liscard town centre is easily accessible by bus and benefits from a modern bus station/interchange. Access by private car is also straightforward, with parking available at the Cherry Tree Centre, Asda superstore and several surface level car parks. There has been recent investment in cycle access from the south via Central Park. However, this does not extend through the centre and cycle parking is poorly placed and in need of improvement.

3.14.11 A key weakness is Liscard's lack of a railway station, however the centre has numerous and frequent bus services to Liverpool via the Wallasey tunnel, Birkenhead and other centres in the area. The centre does benefit from an extensive walk-in catchment, given the densely populated area that immediately surrounds it.

Environmental Quality

3.14.12 The 2019 health check noted that properties along Seaview Road, Wallasey Road and Liscard Road are in a good condition. The Cherry Tree Centre is a managed shopping mall, whose interior is noted to be well cleaned and maintained but whose exterior interacts poorly with the rest of the centre.

3.14.13 The health check noted that the western boundary along St Albans Road has a poor environmental quality. The pedestrianised section along Liscard Way contains street furniture and planting but it is considered that this area would benefit from public realm enhancements. The proximity of Central Park to the south of the centre does have a positive impact on its environmental quality, however this is somewhat minimal given its peripheral location.

VENUESCORE

3.14.14 The latest VENUESCORE data (2016/17) positions Liscard town centre as the 492nd strongest individual shopping centre in the UK. It witnessed a fall in its rank of 12 places between the 2015/16 edition of the database and the 2016/17 edition – the

latest available. This is likely reflective of the limited investment currently taking place in the centre and the loss of some national multiples in recent years.

3.14.15 In the context of the City Region's 16 defined town/city centres, this ranking places Liscard seventh. The VENUESCORE ranking reinforces the notion that Liscard is a shopping destination of local significance, which serves the day-to-day needs of the densely populated area of Wallasey but is unlikely to attract a great deal of custom from beyond this.

Council Strategies and Emerging Schemes

3.14.16 In terms of Council strategies for Liscard, we are aware that in 2012 the Council produced a Town Centre Action Plan for Liscard in collaboration with local stakeholders. This identified a range of measures to be implemented within the centre (by 2018) in order to halt an identified decline in its offer and attraction. These measures included; the introduction of a new signage strategy, new public realm and landscaping, the introduction of temporary / seasonal uses, and a consideration being given to contracting the centre in order to focus future investment. Our observations suggest that the principles of the Action Plan have not been implemented over the intervening period.

3.14.17 Liscard was awarded £0.5m from the Combined Authority to use toward a series of improvements to improve the vitality and viability of the town centre. Measures included improving shop fronts, creative activities and the provision of CCTV to reduce vandalism and anti-social behaviour.

3.14.18 Liscard town centre has been confirmed as a beneficiary of funding from the Combined Authority's Town Centre Fund, with up to £1m being given to each constituent Local Authority. This funding has been used to develop an integrated masterplan. The masterplan identifies and seeks to support long term ambitions to regenerate Liscard, as well as support bids for future funding (such as through the Government's Future High Streets Fund). The Integrated Masterplan identifies

several medium to long term improvements for the town centre including comprehensive redesigns for several public realm and open spaces, the redevelopment / refurbishment of several key location in the centre (including the redevelopment of the Cherry Tree Centre), developing areas in the centre for residential purposes and the development of a community hub. We are not aware of any existing or applications which are to be submitted in the future which are related to the Masterplan.

Conclusions

3.14.19 In conclusion, Liscard serves the densely populated Wallasey area of the Wirral peninsula and comprises some 296 units and 62,779 sq.m of floorspace. The health check work undertaken in 2019 indicates that the town centre is typically being used by those residing in the local area to meet day-to-day needs. This is evidenced by the above average proportion of retail service uses, strong convenience retail offer and fact that the centre accommodates only a handful of the UK's top comparison goods retailers.

3.14.20 The latest VENUESCORE rankings suggest that Liscard is a 'mid-level' town centre in the context of the City Region, positioned 7th out of the 16 centres assessed. This is to be expected given Wallasey's good connectivity via rapid bus services to Liverpool City Centre – where the majority of residents' comparison goods shopping trips will be undertaken. The proximity of Birkenhead and its higher-order retail offer is likely to be another reason why Liscard functions the way that it does as a centre serving day-to-day needs. Finally, we see it as a positive aspect that funding has been secured to deliver improvements in the centre and that a masterplan has been developed to shape its future, however, there does not appear to be any firm proposals at the time of writing which would see the masterplan realised.

3.15 Heswall

Characteristics and Offer

3.15.1 Heswall town centre is located approximately 7.5km south-west of Birkenhead and 11km south-west of Liverpool City Centre on the eastern coastline of the Wirral peninsula. The centre is linear in form, with the majority of units located along Telegraph Road and Pensby Road. Anchor units include a Tesco superstore on the western side of the centre (Telegraph Road), an Aldi foodstore off May Road, M&S Simply food on Telegraph Road, WH Smith on the Mount and M & Co on Pensby Road.

Diversity of Use

3.15.2 In terms of the scale of Heswall town centre, analysis undertaken as part of a Council conducted health check in July 2019 found that it contained a total of 194 units and 35,547sq.m of floorspace. The health checks undertaken in 2015 and the 2016 retail study did not state the floorspace, however the 2009 retail study found this to be 29,140 sq.m. The table below shows the proportional split of outlets in percentage terms across retail, leisure and commercial sectors. It also identifies the centre’s vacancy rate, as recorded in 2019.

Table 3.14 – Diversity of Use: Heswall Town Centre

Use	Percentage of Outlets (Heswall)	Percentage of Outlets (UK Average – 2019)
Convenience Retailing	6.7%	9.2%
Comparison Retailing	24.7%	29.6%
Retail Service	22.7%	15.0%
Leisure Service	19.6%	24.4%
Financial and Business Services	17.5%	9.9%
Vacant	8.8%	11.7%
Total	100%	100%

Source: Vitality & Viability Health Check Assessments – Heswall (2019). Experian Goad, UK Average Figures May 2019

- 3.15.3 The diversity of use analysis found that the proportion of retail services and financial services was markedly higher than the national averages for the time. Convenience, comparison and leisure services were below the national average. Despite being lower than the national average, the survey found that the leisure services offer was diverse and strong. Despite a below average representation, the health check noted that the comparison offer was reasonably broad and had more of a high-end goods offer compared to other centres in Wirral.
- 3.15.4 The diversity of use analysis suggests that Heswall's primary role is to serve local needs. This is evidenced by the above average proportion of retail service uses (hairdressers, beauticians, opticians, etc.) and financial/business uses, but a below average proportion of comparison units. In terms of floorspace proportions the amount of convenience floorspace (27.3%) was observed to be significantly higher than the national average (16.3%), with the centre benefiting from a Tesco superstore and M&S, Aldi and Iceland supermarkets. This implies that the centre is a regular destination for food shoppers, using the centre on a day-to-day basis for such needs. Residents' comparison goods shopping trips are likely taking place at higher order nearby centres such as Liverpool and Chester.

Retailer and Leisure Representation

- 3.15.5 Although Heswall town centre includes only 2 of the top 28 comparison goods retailers within Experian's annual 'top retailers' list (Boots and WH Smith), it is noted that it has a strong independent comparison goods offer (including clothes and book shops) and also includes various other multiples, including M&Co, Thorntons and Savers.
- 3.15.6 The centre's convenience retail offer is strong and varied. It includes national multiples such as Tesco, M&S, Aldi and Iceland but also a host of independent convenience retailers. The centre's leisure offer is also strong in terms of quality and diversity. There are multiples such as Costa, Pizza Express and Gusto, but also

a host of independent restaurants and bars. Finally, the financial service sector is an important part of Heswall's offer, with several banks, building societies and number of estate agents and accountants present.

Vacancies

- 3.15.7 With regards street level vacancies, the 2019 Heswall health check found that the proportion of vacant street level units within the centre was 8.8%. This was below the national average at the time of 11.7% (July 2019).. This represents evidence that Heswall is a healthy centre, with a high occupier demand for floorspace.

Accessibility

- 3.15.8 Heswall town centre is accessible by bus for the surrounding residential population and benefits from a small bus station on Telegraph Road. The centre has a walk-in catchment which extends to the surrounding residential areas of Heswall. The distance of Heswall Railway station (Brimstage Road) from the town centre limits its attractiveness as a means of access to the town centre, although it is linked by bus services. Access by private vehicle is also straightforward, with parking available at Heswall's various foodstores and within a number of Council operated surface level car parks.

Environmental Quality

- 3.15.9 The 2019 health check found that the overall environmental quality of the centre was good, with well-maintained buildings of a reasonable architectural quality and a reasonable public realm. This was despite the heavy through traffic along Telegraph Road. Areas of soft landscaping, open space and vegetation are located throughout the centre, with open spaces located at the Puddydale and at Heswall Village Hall. The Curve is noted as being an attractive modern addition to the centre at the prominent location of Telegraph Road, The Mount and Pensby Road.

VENUESCORE

3.15.10 The latest VENUESCORE Shopping Centre Index (2016/17) positions Heswall town centre as the 781st strongest individual shopping centre in the UK. It witnessed a fall in its rank of 2 places between the 2015/16 edition of the database and the 2016/17 edition – the latest available. In the context of the City Region’s 16 defined town/city centres, this ranking places Heswall tenth. The VENUESCORE ranking suggests that Heswall town centre is a shopping destination of no more than local significance, which serves the day-to-day needs of the surrounding relatively affluent residential area – with the quality of the centre’s offer reflective of this.

Council Strategies and Emerging Schemes

3.15.11 In terms of strategies for Heswall, the Council produced a Town Centre Action Plan in collaboration with local stakeholders in 2012, which identified a range of measures to be implemented in the centre to further enhance its offer and attraction. These measures included; the introduction of a new signage strategy, additional planting, new street furniture and enhanced cycle parking. It is unclear as to whether the principles of the Action Plan have been implemented over the intervening period.

3.15.12 We are not aware of any future or emerging schemes which would impact on Heswall. There is very little scope for physical expansion of the core shopping area, because of the constraint of immediately surrounding high-density residential areas.

Conclusions

3.15.13 In conclusion, whilst Heswall is a town centre of relatively limited scale, it benefits from a good quality food and non-food offer, comprising several national multiples and a host of independent retailers. The food and drink offer is also good, with several quality national-multiple and independent restaurants serving the town. The

centre's relatively low vacancy rate is a clear indicator of its strong vitality and viability.

3.15.14 The latest VENUESCORE rankings suggest that Heswall is a 'mid-level' town centre in the context of the City Region, positioned 10th out of the 16 centres assessed. Its offer is evidently successfully meeting the day-to-day needs of a relatively local catchment area, but it is not considered that its role extends beyond this. The proximity of Birkenhead and Liverpool City Centres, with their more extensive comparison goods offers, are likely to mean that Heswall residents turn to these higher order centres to undertake these less frequent shopping trips.

3.16 Moreton

Characteristics and Offer

3.16.1 Moreton town centre is located approximately 5km north-west of Birkenhead and 4km west of Liscard, towards the northern coastline of the Wirral peninsula. The centre is linear in form, with the vast majority of units located along Hoylake Road, although there are also small parades situated on Upton Road and Pasture Road. The largest units within the centre include Iceland, Home Bargains and Heron Foods stores located on Hoylake Road. The other units within the town centre are mostly of a small scale and occupied by independents.

Diversity of Use

3.16.2 In terms of the composition of Moreton town centre, analysis undertaken as part the July 2019 health check found that it contained a total of 144 units, which is small increase from the 2015 figure of 141, and 19,214sqm of retail floorspace. Neither the 2015 health check nor the Council's 2016 Retail Study assessed total floorspace, however, based on the 2009 Retail Study this was understood to be 20,100 sq.m, indicating a small contraction. Table 3.15 shows the proportional split

of outlets in percentage terms across retail, leisure and commercial sectors. It also identifies the centre’s vacancy rate, as recorded in 2019.

Table 3.15 – Diversity of Use: Moreton Town Centre

Use	Percentage of Outlets (Moreton)	Percentage of Outlets (UK Average – 2019)
Convenience Retailing	7.6%	9.2%
Comparison Retailing	31.9%	29.6%
Retail Service	22.9%	15.0%
Leisure Service	19.4%	24.4%
Financial and Business Services	9.7%	9.9%
Vacant	8.3%	11.7%
Total	100%	100%

Source: Vitality & Viability Health Check Assessments – Moreton (2019). Experian Goad, UK Average Figures May 2019

3.16.3 The diversity of use analysis found that comparison uses (31.9%) and retail service (22.9%) representation in Moreton was above the national averages (31.9% and 15.0% respectively). Financial and business services were broadly in line with the national average (9.7% in Moreton to 9.9% nationally). Moreton has a below average proportion of convenience units (7.6% in Moreton to 9.2% nationally), and leisure services (19.4% to 24.4%).

3.16.4 Moreton appears to meet the daily needs of its population, as demonstrated by its large proportion of retail services (hairdressers, salons etc) and, although below average, the variety in the convenience offer would meet daily needs. Comparison uses were above the national average, which is uncharacteristic when compared to other centres of this size in the city region, however the survey noted this was underpinned by a large number of charity shop uses and the comparison offer would benefit from diversification. Leisure service provision was found to be more limited when compared to other centres.

Retail and Leisure Representation

- 3.16.5 Moreton town centre includes only 2 of the top 28 comparison goods retailers that are featured within Experian's annual 'top retailers' list, this being Superdrug and Boots. There are however a number of other national multiple comparison goods retailers within the centre, including: Home Bargains, Thorntons and Rowlands Pharmacy.
- 3.16.6 Moreton benefits from a strong and varied convenience goods offer, including multiples such as Iceland, Tesco Express and Heron Foods, alongside a number of independent operators. In terms of the centre's leisure service offer, this is underpinned by take away outlets. It also noted the presence of a public house which fell outside of the centre but the proximity of which contributes to its evening economy offer.

Vacancies

- 3.16.7 With regards street level vacancies, the 2019 Moreton health check found that the proportion of vacant street level units within the centre was just 8.3%. This was below the national average at the time of 11.7% (May 2019). This evidence suggests that Moreton is a busy and stable centre and one which is vital and viable.

Accessibility

- 3.16.8 Vehicular access to the centre is straightforward from surrounding residential areas via the A551 (Pasture Road / Upton Road) and A553 (Hoylake Road), whilst there are also Council operated surface level car parks serving the centre. These arterial routes also mean that Moreton is highly accessible by bus. However, they do represent a significant barrier when it comes to pedestrian movement through the centre. Whilst there are some on-road cycle lanes on Pasture Road just outside the centre, none was observed within. Some Cycle parking facilities were noted within the town centre.

Environmental Quality

3.16.9 The 2019 health check found Moreton's environmental quality to be mixed, with older, more traditional units having a high quality and being in a good condition and the more modern units requiring upkeep. It also noted that other areas of the centre would benefit from cosmetic improvements (it would benefit from the inclusion of soft landscaping and vegetation) and the high volumes of traffic through the centre detracts from its overall quality.

VENUESCORE

3.16.10 The latest VENUESCORE Shopping Centre Index (2016/17) identifies Moreton town centre as the 1,418th strongest individual shopping centre in the UK. It witnessed a fall in its rank of 137 places between the 2015/16 edition of the database and the 2016/17 edition – the latest available. This is reflective of the fact that there are very few national multiples within the town centre and that limited new investment is currently taking place by such retailers. In the context of the City Region's 16 defined town/city centres, this ranking places Morton 14th.

3.16.11 The VENUESCORE ranking suggests that Moreton town centre is a shopping destination of no more than local significance, which serves the day-to-day needs of the surrounding residential area. The fact that the centre is busy and benefits from a low vacancy rate suggests that it is successfully fulfilling this role.

Council Strategies and Emerging Schemes

3.16.12 In terms of strategies for Moreton, the Council produced a Town Centre Action Plan in collaboration with local stakeholders in 2012. This identified a range of measures to be implemented within the centre (by 2016) in order to further enhance its offer and attraction. These measures included; the introduction of improved signage, additional planting, refurbished street furniture and enhanced cycle parking.

3.16.13 There are no large-scale schemes in the pipeline that would impact upon the role and function of Moreton town centre. There is very little scope for physical expansion of the core shopping area, because of the constraint of immediately surrounding high-density residential areas.

Conclusions

3.16.14 In conclusion, the health check analysis suggests that Moreton is typically being used by those within the surrounding residential area to meet day-to-day needs as a service centre. Whilst comparison uses are above average, and a higher proportion than what is typically observed in centres of a similar size, the comparison offer would benefit from diversification and wider comparison needs are likely met in larger destinations nearby. Vacancy rates are below the national average which is a strong indication of the centre's vitality and viability however cosmetic improvements would benefit the centre's environmental quality.

3.17 West Kirby

Characteristics and Offer

3.17.1 West Kirby town centre is located on the north-western coastline of the Wirral peninsula, with Birkenhead some 13.4km to the east and Heswall 8.1km to the south-east. The centre is largely focussed along Grange Road, Banks Road and Dee Lane. Its anchor units include a Morrisons foodstore on Dee Lane and an Aldi foodstore on Bridge Road. The other units within the town centre are mostly small-scale, traditional, terraced units which are occupied by independent retail and leisure uses. West Kirby town centre benefits from an adjacent beach and marine lake, which ensures that the centre is popular with tourists as well as local residents.

Diversity of Use

3.17.2 With regards the scale and form of West Kirby town centre, analysis undertaken as part of a Council conducted health check in July 2019 found that it contained a total

of 171 units and 24,048 sq.m of floorspace. Neither the 2015 health check nor the Council’s 2016 Retail Study assessed total floorspace, however, this was recorded in the 2009 Retail Study as 23,700 sq.m. The table below shows the proportional split of outlets in percentage terms across retail, leisure and commercial sectors. It also identifies the centre’s vacancy rate, as recorded in 2019.

Table 3.16 – Diversity of Use: West Kirby Town Centre

Use	Percentage of Outlets (West Kirby)	Percentage of Outlets (UK Average – 2019)
Convenience Retailing	9.9%	9.2%
Comparison Retailing	36.8%	29.6%
Retail Service	17.5%	15.0%
Leisure Service	22.2%	24.4%
Financial and Business Services	12.3%	9.9%
Vacant	1.7%	11.7%
Total	100%	100%

Source: Vitality & Viability Health Check Assessments – West Kirby (2019). Experian Goad, UK Average Figures May 2019

3.17.3 The Council conducted diversity of use analysis found that West Kirby had above average proportions of convenience, comparison, retail service and financial and business service uses. West Kirby was observed as having a slightly lower than average proportion of leisure services. The health check notes the presence of the sailing club and restaurants some 400m distance from the centre, the former of which it considered would attract users to the centre and add to its overall leisure offering.

3.17.4 The diversity of use analysis suggests that West Kirby’s primary role is to serve local needs. This is evidenced by the fact that there is an above average proportion of most retail uses, with the exception of leisure services. However, the centre also evidently has an important role as a tourist destination, and this is considered to be the primary reason why the proportion of comparison goods units is well above national average levels – with there being various independent gift and craft shops.

Retail and Leisure Representation

- 3.17.5 Although West Kirby town centre includes only 2 of the top 28 comparison goods retailers within Experian's annual 'top retailers' list (Boots and Superdrug), it is noted that it has a strong independent comparison goods offer (including clothes, gift, furniture and book shops) and also includes other national multiples, including M & Co and Hallmark.
- 3.17.6 The centre's convenience retail offer is strong and varied. It includes national multiples such as Morrisons and Aldi but also a host of independent convenience retailers. Despite the below average representation, West Kirby's leisure offer was considered to be reasonably good, with national multiples present such as Costa but also a host of independent restaurants and bars. Finally, the financial service sector is an important part of West Kirby's offer, with several banks, solicitors and number of estate agents present.
- 3.17.7 Of particular note within West Kirby is the relatively high number and strong quality of independent retailers and services. These independents are largely focussed on Banks Road, The Crescent and Grange Road.

Vacancies

- 3.17.8 With regards street level vacancies, the 2019 West Kirby health check report prepared by Wirral Council found that the proportion of vacant street level units within the centre was just 1.2%. This was well below the national average at the time of 11.7% (July 2019) and a reduction when compared to the levels observed in 2015 (2.4%). This evidence highlights that West Kirby is a well-utilised and stable centre and one that is evidently in very strong health.

Accessibility

- 3.17.9 West Kirby is easy to access by public transport via both regular bus services and a town centre railway station. The station's location in the heart of the town centre is

of particular benefit in attracting tourist visitors, with frequent services to both Birkenhead and Liverpool. Access to the centre by private car is also straightforward, with car parking available at the Aldi and Morrisons foodstores, as well as within various Council operated surface level car parks. The streets were found to be walkable and wide enough to accommodate a range of users. The health check also noted the Wirral Way cycle path was located adjacent to the centre, linking it with Hoylake and Heswall. The distribution of cycle parking appeared to be concentrated around the railway station and nowhere else in the centre.

Environmental Quality

3.17.10 The 2019 health check found that West Kirby is an attractive town centre with several prominent buildings. The buildings along the Crescent have a unique aesthetic whilst the southern area of the centre has the look of a more traditional high street. The health check considered that the centre would benefit from more soft landscaping and vegetation and suggested that the area around the station would benefit from cosmetic improvements to reflect its use as a gateway to the town.

VENUESCORE

3.17.11 The latest VENUESCORE Shopping Centre Index (2016/17) identifies West Kirby town centre as the 1,368th strongest individual shopping centre in the UK. It witnessed a rise in its rank of 61 places between the 2015/16 edition of the database and the 2016/17 edition – the latest available. This is likely reflective of the fact that West Kirby is a healthy and stable centre in which retail and leisure users appear keen to invest. However, given West Kirby's relatively limited size in the context of the City Region's other defined town/city centres, it is still ranked only 13th of 16 overall.

Council Strategies and Emerging Schemes

3.17.12 In terms of strategies for West Kirby, the Council produced a Town Centre Action Plan in collaboration with local stakeholders in 2012. This identified a range of measures to be implemented within the centre (by 2018) in order to further enhance its offer and attraction. These measures included, amongst other things: the introduction of additional landscaping and tree planting, the refurbishment of Edwardian shopfront canopies, the introduction of additional street furniture, and the pedestrianisation of the Crescent. It is unclear as to whether the principles of the Action Plan have been implemented over the intervening period.

3.17.13 There are no large-scale schemes in the pipeline that would impact upon the role and function of West Kirby town centre. There is very little scope for physical expansion of the core shopping area, because of the constraint of immediately surrounding high-density residential areas and the coast.

Conclusions

3.17.14 In conclusion, whilst West Kirby is one of the smaller town centres in the City Region, it benefits from a good quality food, non-food and leisure offer, comprising several national multiples and a host of independent retailers. The centre's low vacancy rate is a clear indicator of its strong vitality and viability, and this is evidently supported not just by the surrounding resident population but also by tourist visitors to the centre given its coastline location. The implementation of the measures outlined in the adopted action plan would help to ensure that West Kirby maintains its existing role and function.

3.17.15 In a similar vein to a number of Wirral's other existing smaller centres, West Kirby appears to be successfully meeting the day-to-day needs of a relatively localised catchment area as a 'service centre'. However, it does evidently also have a separate role as a tourist destination, and the centre's strong independent comparison goods offer is reflective of this. The proximity of Birkenhead and Liverpool City Centres,

with their more extensive comparison goods offers, mean that local residents likely turn to these higher order centres to undertake these less frequent non-food shopping trips.

4.0 Centre Hierarchy Analysis

4.1 Introduction

4.1.1 Drawing upon the desk-based retail audits undertaken as part of the second stage of our work, the following section seeks to compare some of the key characteristics of the City Region's sixteen town centres. This will include comparison of their ranking within Javelin Group's UK Shopping Venue Rankings (Venuescore), the approximate number of retail units and floorspace, the number of 'top' comparison goods operators they accommodate, and the non-food turnovers that the centres achieved in their latest respective retail studies. This stage will enable us to identify and group those centres which have an equivalent role and function within the City Region – allowing for a robust retail hierarchy to be developed.

4.2 VENUESCORE

4.2.1 Javelin Group's 'VENUESCORE' database ranks all of the UK's town centres based on a set methodology. This involves an evaluation of each centre in terms of its provision of multiple retailers (including anchor stores, fashion operators, and non-fashion multiples) – to which a score is attributed. In addition to this score, each location is assessed in terms of a range of other attributes, including: market positioning, age focus, fashion focus, fashionability, foodservice bias and anchor strength. The VENUESCORE database is an important tool in understanding the retail hierarchy at a regional and sub-regional level.

4.2.2 Sixteen town and city centres have been identified within the Liverpool City Region. Table 4.1 on the following page sets out the hierarchy according to the ranking set out within the latest version of Javelin's VENUESCORE (2016/17). The table also includes the score achieved by each centre, the change in rank between the 2015/16 and 2016/17 editions of VENUESCORE, and the location grade set out within VENUESCORE.

4.2.3 By way of an explanation of the location gradings, Javelin split centres into eight distinct grades of venues in the UK in which multiple retailers trade. These range (high to low) as follows: Major City, Major Regional, Regional, Sub-Regional, Major District, District, Minor District and Local. At the higher end of the grading (Major City) a score of at least 363 is required, whilst the lowest graded centres (Local) have a score of 19 or less.

Table 4.1 – Hierarchy in Liverpool City Region based on VENUESCORE (2016/17)

Centre Name	Local Authority	2016-17 Score	2016-17 Rank	Rank Change	Location Grade
Liverpool	Liverpool	548	5	0	Major City
Southport	Sefton	179	104	-4	Regional
Birkenhead	Wirral	160	137	5	Regional
St Helens	St Helens	138	173	-7	Regional
Bootle	Sefton	92	289	8	Sub-Regional
Huyton	Knowsley	62	473	43	Major District
Liscard (Wallasey)	Wirral	60	492	-12	Major District
Halton Lea*	Halton	43	710	-51	District
Widnes*	Halton	41	754	-19	District
Heswall	Wirral	40	781	-2	District
Kirkby	Knowsley	34	937	6	District
Earlestown	St Helens	24	1325	47	Minor District
West Kirby	Wirral	23	1368	61	Minor District
Moreton	Wirral	22	1418	-137	Minor District
Prescot	Knowsley	20	1559	-130	Minor District
Runcorn Old Town	Halton	16	1888	-99	Local

Note. *See commentary in Paragraphs 4.2.8 and 4.2.9 below concerning discrepancies in the VENUESCORE attributed to both Halton Lea and Widnes.

4.2.4 Table 4.1 below shows that Liverpool city centre has a VENUESCORE and ranking which is far superior to any of the other centres within the City Region. It is the only centre in the sub-region classified as a 'Major City' and one of only 20 centres in the UK to be classified in this fashion. Indeed, Liverpool is actually ranked 5th strongest centre in the UK (excluding London), with only the likes of Manchester, Leeds,

Glasgow and Birmingham above it. Accordingly, in the context of the City Region's hierarchy, there can be little doubt that Liverpool should occupy the top position as the only 'City Centre' and the dominant retail destination.

- 4.2.5 Based on the VENUESCORE index, the Liverpool City Region contains no 'Major Regional' centres (likes of Sheffield, Southampton, York, etc.) but does include a number of 'Regional Centres' (VENUESCORE of 137 to 229). This includes Southport, Birkenhead and St Helens. Our retail audit within the preceding section highlighted that each of these centres has a role and function which involves serving a catchment area beyond their immediate residential environs. In each case, the centres benefit from an extensive comparison goods offer and accommodate a wide range of multiple retailers.
- 4.2.6 VENUESCORE's next defined level is 'Sub-Regional', in which Bootle is categorised. Despite being of broadly equivalent size to a number of the City Region's other defined centres in terms of floorspace, Bootle benefits from a higher position in VENUESCORE's ranking because of its wider range of comparison goods retailers which are housed within the Strand Shopping Centre. This offer is anticipated to draw visitors from a wider metropolitan area including parts of northern Liverpool.
- 4.2.7 Below the 'Sub-Regional' level are three classifications of 'District' level centre ('Major', 'District' and 'Minor'). This accounts for the next ten town centres within the City Region. Those considered to be Major District centres include Huyton and Liscard; District level centres include Halton Lea (Runcorn Shopping City), Widnes, Kirkby and Heswall; whilst Earlestown, West Kirby, Moreton and Prescot are classified as Minor District centres. This 'District' level classification – as set out across three sub-levels – is largely consistent with our retail audits of these ten town centres, which found that in the vast majority of cases they functioned as service centres, meeting the day-do-day needs of their surrounding residential catchments (often encompassing the inhabitants of their town).

- 4.2.8 One notable exception to this was Widnes which, despite its size and evident attraction, is only classified as a 'District Centre' by VENUESCORE. We have realised that the reason for this is because Widnes Shopping Park is identified as a separate shopping destination to the town centre, despite both falling within the defined town centre boundary from a development plan perspective. If the scores of the two destinations are aggregated (79) it actually places Widnes within the 'Sub-Regional' grading, a level which is more commensurate with its role and function.
- 4.2.9 We have also noted the same anomaly with Halton Lea (Runcorn Shopping City), where Trident Retail Park is regarded by VENUESCORE as a separate location, despite falling within the town centre boundary alongside the Shopping City mall complex. If the two scores for these venues are aggregated (75), it would theoretically place Halton Lea on the periphery of VENUESCORE's 'Sub-Regional' grading. Whilst this grading might suggest that Halton Lea has an equivalent role and function to Widnes, there are various other factors (explored in the sub-section below) which we feel differentiate the two centres. This means that in our view Halton Lea remains more comparable to the VENUESCORE classification 'Major District' centre (i.e. Huyton and Liscard) than it does the 'Sub-Regional' grading.
- 4.2.10 Finally, Runcorn Old Town is the only town centre in the City Region which falls within VENUESCORE's 'Local' centre classification (those with a score of 19 or less). This centre is not actually the smallest in terms of floorspace or unit numbers in the context of the City Region. Its low ranking is likely a consequence of the fact that its offer is largely independent and there are few multiple comparison goods retailers in particular – an important factor in VENUESCORE's weighting system. In reality, we are of the view that the role and function of Runcorn Old Town is comparable to those City Region centres identified in the 'Minor District' category (i.e. Earlestown, West Kirby, Moreton and Prescott). Accordingly, it is considered that the VENUESCORE classification of Runcorn Old Town should be treated with caution and does not lead us to believe that the centre should occupy a lower level in the sub-regional hierarchy than other 'District' level centres.

4.2.11 Overall, our analysis of the VENUESCORE data provides important evidence that the City Region’s future retail hierarchy should distinguish Liverpool as the dominant shopping and leisure destination within the Liverpool City Region area – such is its far higher ranking. Below this are four to five centres (including Widnes) which evidently have a sub-regional attraction – given their offer, scale and form. Finally, there are what VENUESCORE describe as ‘District’ level centres (which we include Runcorn Old Town within). We consider these town centres to represent ‘service centres’ of varying scales that perform an equivalent role in meeting the day-to-day needs of a smaller residential catchment.

4.3 Floorspace, Units, Retailers and Turnover

4.3.1 With VENUESCORE representing a useful and robust tool in establishing a baseline hierarchy for the City Region, it is important to sense-check this against some of the data gathered as part of our town centre audits from the preceding section. Within this subsection the exercise is undertaken quantitatively, drawing upon factors such as floorspace, total units, Experian’s list of ‘top’ comparison goods retailers, and Retail Study derived comparison goods turnovers. In the following sub-section, we consider the hierarchy from a qualitative perspective, having particular regard to Council strategies and emerging schemes.

4.3.2 As a starting point, it is important to emphasise that the data gathered on the various centres has largely been sourced from the respective retail evidence base documents of the relevant local authority, rather than through fresh empirical evidence³². The main reason for this is to ensure that the study does not replace or challenge existing retail and leisure assessments.

4.3.3 It is therefore acknowledged that data is being compared that was gathered at different times, with some sources (Retail Studies) being more up-to-date than

³² The exception to this is our analysis of Experian’s ‘Top 28 Comparison Goods Retailers’ which has been confirmed accurate as of January 2019 and still remains the most up to date list despite closure of some of the operators on that list.

others. However, with the purpose of our analysis to explore the role and function of the City Region’s existing town centres as part of an overall network, what is key is that the data offers a broad impression of scale, form and attraction. Providing that the data is relevant in that regard (which we believe it is) then it is considered to be wholly appropriate to use for comparative purposes.

4.3.4 Table 4.2 below sets out the: total floorspace quantum, units, ‘top’ comparison retailers and comparison goods turnover of each of the 16 town centres within the City Region. The data is ordered by total floorspace quantum (sq.m). In each case it is sourced from the respective Council’s retail evidence base, details of which are referenced in our individual centre audits.

Table 4.2 – Hierarchy based on Floorspace, Units, Retailers and T/O (Ordered by Total Floorspace

Centre Name	Local Authority	Floorspace Quantum (Sq.m)	Total Units	Experian ‘Top’ Comparison Retailers	Comparison Goods Turnover (£m)
Liverpool	Liverpool	330,837	1,016	27	£939.9
Birkenhead	Wirral	158,356	480	21	£198.1
Southport	Sefton	158,070	757	24	£221.1
St Helens	St Helens	116,380	443	13	£204.3
Widnes	Halton	83,569	372	12	£121.8
Liscard (Wallasey)	Wirral	62,780	296	7	£32.0
Halton Lea	Halton	59,717	120	9	£21.8*
Bootle	Sefton	50,960	198	7	£30.7
Heswall	Wirral	35,547	194	2	£25.9
Huyton	Knowsley	31,260	100	8	£30.2
Kirkby	Knowsley	28,572	91	5	£19.5
West Kirby	Wirral	24,048	171	2	£16.5
Earlestown	St Helens	21,296	127	0	£13.5
Prescot	Knowsley	19,810	141	2	£24.4
Moreton	Wirral	19,214	144	2	£14.7
Runcorn Old Town	Halton	16,657	169	1	£37.8*

Total Floorspace

- 4.3.5 In terms of total floorspace, Table 4.2 shows a clear distinction between Liverpool city centre and all others in the City Region. Indeed, Liverpool contains more than twice the floorspace of the next largest centre (Birkenhead). This reinforces the notion that Liverpool has a role and function above and beyond that of any other within the sub-region and should be classified as such.
- 4.3.6 Birkenhead and Southport contain in excess of 150,000 sq.m of floorspace, and St Helens more than 100,000 sq.m, distinguishing themselves from other centres in the City Region in terms of the size. Widnes is the next largest centre, falling within the still substantial size bracket of 75,000 sq.m to 100,000 sq.m of floorspace. Centres falling in the Bracket of 50,000-75,000sq.m floorspace are Halton Lea, Bootle and Liscard.
- 4.3.7 There is then a drop of more than 15,000 sq.m to the next largest set of centres – comprising Huyton, Heswall and Kirkby – all of which are broadly 30,000 sq.m in size. Interestingly, the remaining six town centres – which we consider to represent local needs ‘service centres’ – are all within a size range of between broadly 16,000 sq.m to 30,000 sq.m, highlighting their comparable role and function.
- 4.3.8 Our analysis of existing floorspace therefore suggests that there are potentially three distinct levels within the City Region’s hierarchy. Liverpool city centre evidently stands alone at the top of this, with it being larger than second and third largest centres combined. There are then four centres Southport, St Helens, Birkenhead and Widnes which have between 75,000 sq.m and 150,000 sq.m – which still represents a very significant quantum of floorspace and is commensurate in our view that these centres perform a sub-regional role.
- 4.3.9 In terms of the remaining eleven centres with floorspaces between broadly 60,000 sq.m and 20,000 sq.m; whilst it is clear that there is a notable difference between them in size, it is considered that their role and function is broadly comparable as

service centres that meet the needs of differing localised catchments. For example, whilst Bootle, Liscard and Halton Lea are larger centres, they serve more densely populated immediately surrounding residential areas. The smaller scale of West Kirby, Prescott and Moreton is commensurate with the more limited surrounding residential populations.

Total Units

- 4.3.10 The total number of units within each centre has been sourced from the retail evidence base of each respective Local Authority area. Again, whilst it is acknowledged that unit numbers can change on an annual basis and the information within some Retail Studies may now be somewhat dated, the data available to us is considered sufficient to offer a broad impression of the scale of each centre.
- 4.3.11 The data identifies Liverpool city centre as being the largest of those assessed by some considerable margin – which is equivalent to the findings in relation to total floorspace. Southport is the second largest centre in terms of overall unit numbers (757), with some 280 more units than the third largest centre, Birkenhead (480) and around 300 units more than the fourth largest, St Helens (443). Next it is noted that each of Liscard, Widnes and Bootle have between broadly 200 and 400 units. The final nine centres have between broadly 90 and 190 units, with an average of some 130.
- 4.3.12 As with our analysis of total floorspace, it is clear that Liverpool city centre is of a very different role and function to all of the other centres within the hierarchy and should be differentiated in this fashion. It is then clear that the centres which we believe have a sub-regional role (such as Southport, St Helens, Birkenhead and Widnes) are materially larger in terms of their number of units than the vast majority of others – with each containing well over 300. Finally, the majority of the remaining town centres – that we regard as ‘service centres’ – have between 100 and 200 units.

4.3.13 There are clearly some anomalies in these findings, such as Liscard containing an estimated 296 units – thereby placing it above some materially larger centres. However, it is important to bear in mind that traditional centres such as Liscard contain a significant number of smaller terraced properties, largely occupied by independents. Therefore, it is important to consider total unit numbers alongside total floorspace in particular.

Experian 'Top' Comparison Retailers

4.3.14 Experian Goad publishes an annual list of the top national-multiple comparison goods retailers³³. Such retailers act as 'anchor' tenants within town centres, adding to their overall appeal and driving pedestrian footfall. The list can, to some extent, be regarded as a barometer of a centre's overall attraction, with the largest and most successful centres more likely to accommodate the top national multiples. In the case of Liverpool City Centre, it is significant that it was home to 27 of the top 28 comparison goods retailers, including John Lewis, Debenhams and M&S when the latest Experian Goad list was published in 2022. This emphasises the centre's strength of attraction as a comparison goods shopping destination and represents further evidence of its leading position within the sub-regional hierarchy.

4.3.15 However, Southport also contained a substantial 24 of the 'top' comparison retailers, with Birkenhead 21, and St Helens and Widnes 13 and 12 such retailers respectively – broadly half of the total. None of the other centres within the sub-region contained more than 9 of the 'top' comparison retailers, with Halton Lea the highest (with 9) and Runcorn Old Town and Earlestown containing just one such retailer between them.

4.3.16 Our analysis of the presence of Experian's 'top' comparison goods retailers reinforces our view that there are three core tiers within Liverpool City Region's

³³ The list of retailers includes: Debenhams, Burton, House of Fraser, Dorothy Perkins, John Lewis, H & M, Marks & Spencer, Monsoon Accessorize, New Look, Next, Primark, Argos, River Island, Boots, Topman, T K Maxx, Topshop, W H Smith, Wilkinson, Carphone Warehouse, Clarks, Clintons, EE, HMV, O2, Superdrug, Vodafone and Waterstones.

hierarchy. Liverpool heads this, with the fact that it accommodated 27 of the UK's top 28 comparison goods retailers further evidence that it functions at a different level to all others across the Liverpool City Region area. There are then clearly several town centres (Southport, St Helens, Birkenhead and Widnes) which function as important comparison goods shopping destinations within the overall network of centres – and the fact that each contained 13 or more 'top' comparison goods retailers (as per 2019) reinforces this. Finally, the remaining 11 town centres – each of which contained less than 10 'top' comparison retailers – are reflective of those that we believe largely function as service centres which meet the day-to-day needs of more localised catchment areas. There are still substantial differences in the size of those centres within this lower tier of the hierarchy and this is reflective of the respective local resident populations that they serve.

Comparison Goods Turnover

- 4.3.17 The final quantitative indicator that we have considered is the total comparison goods turnover of each centre, which has been sourced from the latest available Local Authority Retail Study in each case. As with some of the other data sources drawn upon, it is important to caveat that turnover have been sourced from different Retail Studies, prepared at different times, which draw upon different price bases. To compensate for this, we have only considered the total turnover of each centre in very broad terms. A further complication is that the latest Halton Retail Study (2017) acknowledges that the survey derived turnovers of both Halton Lea and Runcorn Old Town are likely to be inaccurate, in view of confusion over Runcorn destinations in the responses received to the household shopper survey.
- 4.3.18 Notwithstanding this, we believe that some fairly straightforward and conclusive observations can be made on the comparison goods turnovers of the centres. Firstly, with a turnover that is more than four times larger than any other centre within the City Region, the data reinforces our view that Liverpool occupies its own tier at the top of the sub-regional hierarchy. It is then noted that the four centres which we

have suggested hold a sub-regional role as key comparison-goods shopping destinations (Southport, St Helens, Birkenhead and Widnes) each have a comparison goods turnover of between £120m and £210m.

- 4.3.19 Significantly, of the eleven centres below this tier, none have a comparison goods turnover of more than £61m – broadly half that of the higher-order sub-regional centres we have identified. Indeed, the average comparison goods turnover of these centres is £26.7m, reinforcing the notion that their role and function is largely that of service centres which meet more localised needs within the overall network of town centres.

4.4 Other Factors

- 4.4.1 Whilst the above quantitative analysis provides strong evidence to support a hierarchy based on three distinct tiers, it is important to consider whether any Council strategies or emerging schemes have the potential to change the role and function of any individual centre. This would be of significance to our conclusions only if the centre were to perform in the future in a way that means that it was effectively elevated to a higher tier in the adopted hierarchy.
- 4.4.2 Starting with Liverpool, our audit contained in Section 3 of this report has confirmed that there are a significant number of Council strategies, emerging policy documents and schemes which together will result in the regeneration of vast areas of Liverpool city centre and its adjacent docklands over the coming years. The overall area earmarked for regeneration can be regarded as one of the largest in the region, if not the country, and it offers the opportunity to bring forward development that will further elevate Liverpool's status within the sub-region and beyond. In summary, with Liverpool already occupying the top tier in our local hierarchy and further extensive regeneration planned, it seems clear that it will maintain its current role and function in the future.

- 4.4.3 Our assumed secondary tier contains centres of sub-regional significance that offer an extensive comparison goods offer alongside other services. This includes Southport, Birkenhead, Widnes and St Helens. We are aware of regeneration plans within a number of these centres. For example, in Birkenhead town centre a planning application has been approved in 2021 for a new commercial business district, comprising high rise offices, on land currently occupied by the town centre's leisure centre and Vue cinema. The scheme will also involve a new leisure centre, market hall and further retail and commercial floorspace. Meanwhile, St Helens Council have outlined a vision for the regeneration of St Helens town centre, led by a canal-side regeneration scheme.
- 4.4.4 Whilst these regeneration proposals are welcomed, and would no doubt enhance the vitality and viability of the respective town centres, they are evidently not of a scale that would lead either St Helens or Birkenhead to be elevated to the level of Liverpool city centre within a sub-regional hierarchy. Accordingly, these emerging strategies / schemes do not change our assumptions in respect of a future retail hierarchy for the Liverpool City Region.
- 4.4.5 The final tier within our assumed retail hierarchy comprises the remaining eleven town centres in the City Region, each of which we consider to predominantly function as service centres – serving the day-to-day needs of surrounding residential populations of varying sizes. Again, there are a number of Council strategies and emerging schemes that we are aware of across these smaller town centres and we reference those of greatest significance to our analysis below.
- 4.4.6 In the case of Kirkby, for example, St Modwen secured planning permission in November 2017 for a scheme of approximately 12,000 sq.m of new retail and leisure floorspace. This included a 4,200 sq.m foodstore and fourteen units (circa 8,000 sq.m) operating within a combination of retail, leisure and restaurant uses. Much of this development has already been completed and the anchor store now occupied by Morrisons.

- 4.4.7 Whilst the above scheme and other public realm enhancement have significantly enhanced the vitality and viability of Kirkby town centre, it is still considered that in the context of the City Region as a whole, it will remain a 'mid-level' centre serving the Knowsley area rather than one of wider sub-regional significance (i.e. our second tier of centre). This is evidenced by the fact that the new 12,000 sq.m of floorspace referenced above was in effect replacement floorspace with some 12,000sq.m being demolished to accommodate the new development. Kirkby town centre is therefore still substantially smaller than various other centres which currently fall within our third tier (such as Halton Lea, Bootle and Liscard).
- 4.4.8 Prescott too is benefitting from significant investment since 2013, with the last major component 'Shakespeare North Playhouse' due to complete in summer 2022. This will comprise a 350 seat Jacobean theatre, including education facilities, a studio theatre, exhibition area, café / bar and outdoor spaces. Other projects already completed include improvements to Prescott Train station, in order to make the town centre more accessible for visitors, and Heritage Lottery funding for a Townscape Heritage Initiative, which has transformed the centre's buildings and streetscene by building on its heritage credentials.
- 4.4.9 Whilst it is anticipated that the new theatre will provide a step-change in the town centre's leisure offer, increasing visitor numbers and no doubt attracting investment in the centre's evening economy, – it is not anticipated that the diversification of Prescott's offer will result in it being elevated within the city-region's hierarchy to a centre of sub-regional significance.
- 4.4.10 In summary, as part of our audits of each individual centre we have identified various Council strategies and emerging schemes which will bring forward positive change. Whilst these will undoubtedly contribute to stronger vitality and viability and in some cases consolidate the role and function of existing centres, it is not anticipated that these interventions are of an order which might result in sub-regional centres, such as Birkenhead or St Helens, competing with Liverpool city

centre. Equally it is not anticipated that service centres such as Kirkby or Prescott – which is undergoing significant improvement – would be enhanced to the degree that they would be competing like-for-like with those centres that we have identified as having a sub-regional role.

4.5 Conclusions

- 4.5.1 Drawing upon the retail audits undertaken as part of Section 3 of this report, this section has compared various information sources concerning the sixteen existing town / city centres throughout the Liverpool City Region. The purpose of this is to arrive at a sensible and robust network of centres which is reflective of their role and function and is cognisant of existing shopping patterns.
- 4.5.2 In examining the centres from both a historical perspective (i.e. their role, function, scale and broad performance) and by understanding the strategies in place to develop them in the future, we have been able to arrive at what we consider to be a sensible network of centres which will be the primary focus for future growth and development at the sub regional level.
- 4.5.3 This hierarchy involves Liverpool occupying the top tier, as the dominant retail and leisure destination in the City Region and indeed a key shopping location in the UK. The second tier comprises a network of four large centres (Southport, St Helens, Birkenhead and Widnes) which quantitative evidence suggests are performing an important sub-regional role as key comparison goods shopping destinations in the Liverpool City Region area. Significantly, these centres are distributed in satellite locations to the north, west, east and south-east of Liverpool city centre – thus representing hubs which are easily accessible for a vast residential population. There are examples in a number of these centres of emerging strategies which will expand their respective offers, consolidating their role and function although not to the extent that they would challenge Liverpool city centre directly.

- 4.5.4 We consider that the role and function of the remaining eleven centres are that of 'service centres' which meet the day-to-day needs of more localised catchment areas. These centres represent the third tier of our defined hierarchy. Whilst it is acknowledged that there are still substantial differences in the size and offer of the centres within this lower tier, this is largely reflective of the respective local resident populations that they serve. Our commentary on future schemes and strategies emphasises that there is future expansion planned within some of these lower-order town centres. However, we are not of the view that such schemes will elevate any of the town centres to the 'sub-regional' tier of our proposed hierarchy.
- 4.5.5 The following section of our report explores this proposed hierarchy in further detail and seeks to outline some broad policy recommendations.

5.0 Policy Recommendations

5.1 The Role of Spatial Plans in Defining a Network of Centres

5.1.1 Paragraph 85 of the National Planning Policy Framework is clear that planning policies should define a network and hierarchy of town centres. It continues that this is important in order to promote their long-term vitality and viability, by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing), and reflects their distinctive characters.

5.1.2 Whilst no specific guidance is provided in relation to sub-regional hierarchies, such as the Liverpool City Region, it is considered important that the network which is developed seeks to provide a balanced and even distribution of facilities across the sub-region. This will ensure that communities are not disadvantaged in terms of retail and leisure provision, which can lead to unsustainable patterns of movement to fulfil consumer needs, and can impact negatively on social cohesion objectives.

5.2 Assessing the Spatial Pattern of Centres

5.2.1 As part of this research study, significant data has been gathered on the retail and leisure composition of the Liverpool City Region's town and city centres. This information has been further supported by evidence of Council strategies and emerging schemes, in order to understand whether these will alter the role and function of the centres in the future.

5.2.2 The data has clearly established that the City Region's town centres are of a widely varying scale, composition and offer. However, there is no policy definition of what a 'national', 'regional', 'sub-regional' or perhaps a more localised 'service centre' should comprise of or how it should perform. As such, judgements are involved in determining which centres have particular significance or contribute to the overall balancing of retail and leisure provision at a sub-regional level.

- 5.2.3 In this regard, our retail audit work has clearly established that the City Region is anchored by the 'regional' or arguably 'national' centre of Liverpool, one of the strongest retail and leisure destinations within the Northwest and indeed the UK (as identified by VENUESCORE data). Given the significant investments planned and underway within Liverpool City Centre, it is evident that over the short to medium-term the centre has the potential to further develop its status and enhance its role and function as a regional pole and national / international destination.
- 5.2.4 Whilst it is clear that Liverpool city centre is the major retail and leisure destination within the City Region, our retail audit work also demonstrates that it does not dominate to the detriment of other important centres within the sub-regional network. For example, centres such as Southport, St Helens, Birkenhead and Widnes all appear to perform particularly strong retail and leisure roles, despite the overall influence of Liverpool at the core of the sub-region. Indeed, it appears that they complement rather than compete directly with this higher order centre. These centres can be regarded as sub-regional or 'City Regional' in terms of their overall importance and influence over the catchment population.
- 5.2.5 Below these centres of sub-regional standing, it is clear that the City Region benefits from a further tier of town centres that act as important 'service centres' for the surrounding residential populace. Within this tier of the sub-regional network, evidence suggests that certain service centres are performing at different levels, which reflect their specific local hierarchy. For example, centres such as Bootle, Liscard and Halton Lea currently perform a role and function at a higher level than centres such as Prescot, Kirkby and Huyton. However, all of these service centres would appear to combine to form a network of centres which provide a good balance of facilities across the City Region.
- 5.2.6 In addition, our audit work has demonstrated that local planning authorities such as Knowsley, who are responsible for Prescot and Kirkby, have aspirations to improve their centres' performance in order to help ensure that they compete more

effectively with surrounding centres of an equivalent order, and provide a better balance of provision in the future.

5.3 Defining a Hierarchy and Network of Centres

5.3.1 Drawing upon the retail audits undertaken as part of Section 3 of this report, Section 4 of our Review has compared various information sources concerning the sixteen existing town / city centres throughout the Liverpool City Region. It has used this information to arrive at a sensible and robust network of centres which is reflective of their role and function and is also cognisant of existing shopping patterns. The proposed network of centres is set out across three 'tiers' below:

Tier 1 Centres

- Liverpool City Centre

Tier 2 Centres

- Birkenhead Town Centre
- Southport Town Centre
- St Helens Town Centre
- Widnes Town Centre

Tier 3 Centres

- Bootle Town Centre
- Earlestown Town Centre
- Halton Lea Town Centre
- Heswall Town Centre
- Huyton Town Centre
- Kirkby Town Centre
- Moreton Town Centre
- Prescot Town Centre
- Runcorn Town Centre

- Liscard (Wallasey) Town Centre
- West Kirby Town Centre

5.3.2 In arriving at this potential network of centres, it must also be noted that the centres listed above are not the only centres that should be supported and promoted for further retail and leisure development over the long-term. There are a number of important district and local centres within the City Region which support the sub-regional network and have important local roles to play.

5.3.3 A number of these are also in need of significant regeneration and urban renaissance. Strategic choices will have to be made at the local authority level to shape the future strategy for these centres (outside this network of town and city centres) and to identify whether or not further growth should be accommodated or whether consolidation would be a better policy option.

5.4 Policy Options for the Spatial Development Strategy

5.4.1 The final sub-section of our Hierarchy Review considers a range of themes that could be developed into strategic policies within the future SDS. This is in order to ensure that a balanced network of town centres is maintained across the Liverpool City Region, which supports sustainable development patterns.

Fostering a 'Network' as Opposed to a Hierarchy

5.4.2 The hierarchical structure for a network of centres is typically established based on retail and leisure statistics, which provide a quantifiable rather than qualitative comparison between centres. This is a tried and tested but relatively simplistic approach, which is driven by measurable data. We have drawn upon such a methodology in order to reach a conclusion on the role and function of centres within the Liverpool City Region – in line with national policy requirements.

5.4.3 However, a mechanistic approach such as this can sometimes overlook important spatial planning issues when considering the development of a better balance of

retail and leisure provision across the sub-region. Accordingly, it is recommended that when planning for the future development of town and city centres across the City Region, this should be done having regard to the network of centres as a whole and the unique characteristics / contribution each can make, as oppose to a specific centre's standing within our established hierarchy.

- 5.4.4 In short, devising a hierarchy should not be looked upon as a barrier to development in certain centres or a 'Status Quo' that must be maintained. Sometimes the most appropriate strategy for a centre may not be justified by statistics or rankings but is instead informed by less tangible factors, such as addressing wider objectives of social inclusion, sustainability or regeneration. Accordingly, the future policy approach of the SDS should offer support for the positive promotion of key centres, as part of a balanced network that serves the sub-region.

Managing Significant Changes within the Network

- 5.4.5 In developing a vision and strategy for the development of a balanced network of centres, the SDS will also have to ensure that the balance achieved by the existing network is not undermined by a dramatic change in the role and function of a particular centre, brought about by very large-scale development. Significant change could impact negatively upon the growth and development of other centres within that established network.
- 5.4.6 To safeguard against this, a policy approach could be adopted across the city region whereby any significant future proposed increase in market share linked to potential redevelopment options (whether they are in-centre, edge-of-centre or out-of-centre) would have to be supported by evidence which demonstrates that the balance of the network would not be detrimentally impacted upon, and that such an increase would not lead to over concentration within that particular centre. Safeguarding policies of this nature would evidently need to be developed as part of the Local Plan process, as opposed to the SDS.

Accommodating Future Retail Needs

- 5.4.7 Whilst it is not the purpose of this Review or indeed the SDS to establish capacity for future growth within the City Region's defined network of centres; it would appear from the various regeneration strategies and emerging schemes that there is scope and ambition to do this within the existing network of centres. The approach is consistent with the positive pro-active approach advocated by the NPPF (and preceding national policy documents) whereby established centres should be the main focus for future retail and leisure development.
- 5.4.8 A considerable number of local planning authorities within the Liverpool City Region are currently pursuing town centre redevelopment opportunities, which often involve undertaking positive master planning exercises, complex land assembly, and/or the recycling and re-purposing of existing floorspace, particularly in planning for post-COVID 19 recovery. The pursuit of such complex but fundamental schemes is central to the development of the role and function of the town centres identified within the sub-regional network. Without these opportunities it is evident that the 'need' for future floorspace provision would have to be met by out-of-centre developments, which would do little to support the regeneration of established centres.
- 5.4.9 The changes to the Use Class Order in September 2020, principally the creation of a new Class E: 'Commercial, Business and Service' is a significant reform that will impact on town centre, with planning permission no longer needed to switch uses between shops, restaurants, offices, gyms and nurseries (amongst others). More recently, the changes to the GPDO in March 2021 allow for the change of use of Class E properties to residential subject to certain criteria and limitations. This could positively reoccupy vacant premises and encourage increased population in town centres to enhance vitality and viability, but there is concern over whether important buildings and frontages could be lost to retail uses permanently to the detriment of the centres. Many local authorities are considering the case for Article 4 directions

to limit the permitted development rights for such a change to “the smallest geographical area possible”, and are undertaking studies to assess the need for, and extent of any such restrictions.

- 5.4.10 Whilst it is evident that the strategy being pursued by each of the Local Authorities in the City Region is to promote the ‘town centre first’ objective, as set out in the NPPF (and preceding guidance), it will be imperative that the development of sub-regional policy as part of the SDS reinforces the fact that local planning authorities should be pro-active in seeking to identify future opportunities for the redevelopment, or proportionate expansion of the city and town centres identified within the network.
- 5.4.11 One way of doing this in the policy approach adopted in the SDS would be to place onus on local planning authorities to develop strategies and action plans for their town centres at the local level. This will ensure that the needs identified for a particular centre within the network (as established by the Local Authority’s own retail study) can be accommodated in the future. Aligned with this, the SDS could set out a presumption against new out-of-centre retail development (unless this is fully justified in line with the NPPF’s impact and sequential tests) to reinforce the notion that local authorities should be pro-active in identifying and creating opportunities for retail and leisure development within town centres.