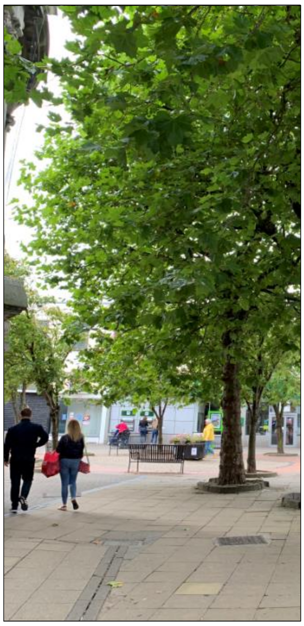
Wirral Retail & Centres Study, 2019

December 2019 – Final Draft

Volume 1 of 2 – Main Report



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Glossary of Terms

Capacity	Retail capacity in terms of this report refers to surplus/deficit of expenditure (£m) which represents the difference between the expenditure and turnover of the identified facilities.
CTN	Shops selling Confectionary, Tobacco and newspapers
Comparison Goods	Comparison goods relate to items not obtained on a frequent basis, these include clothing, footwear, household and recreational goods.
Convenience Goods	Convenience goods relate to everyday essential items including confectionary, food, drinks, newspapers and magazines.
District Centre	District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.
Expenditure Per Capita	The average spend of each person within the defined Study Area on a variety of retail goods.
Expenditure	Expenditure is calculated by taking the population within a defined area and then multiplying this figure by average annual expenditure levels for various forms of goods.
Expenditure Forecasts	This assessment has been undertaken using the 'goods based' approach as prescribed in the Planning for Town Centres Practice Guidance. Retail expenditure forecasts have been derived from Experian Retail Planner Briefing Note 14 (November 2016).
Experian (MMG3)	The database used to identify population, expenditure and socio-economic breakdown of the Study Area population.
Gross Floorspace	Represents the level of total floorspace or footprint of a specific development (i.e. sales area, storage, checkouts, café, display, and so on).
GOAD Plans	Provide accurate information on the composition of town centres, shopping areas, out-of-town retail parks and outlet villages in the UK. Identifies the fascia name, retail category, floorspace and exact location of all retail outlets and vacant premises.

GOAD Reports	Provide a snap-shot of the retail status or demographic make-up of Goad surveyed town centres. Provides a comprehensive breakdown of floorspace and outlet count for all individual trade types in the Convenience, Comparison, Retail Service, Leisure, Financial/Business Services and Vacancy sectors.
Local Centre	Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a local centre.
Net Floorspace	Represents the level of internal area devoted to the sale of goods.
Market Share	Market shares derived from the household survey results, which are based on either the proportion of shopping trips or the proportion of expenditure attracted to a particular centre/facility.
National Multiple	This is a retail or service operator which is or part of a network of nine or more outlets.
Price Base	The price base for the Study is 2017; all prices are or have been adjusted to 2017 in order to be consistent.
Rates of Productivity	This takes into account the potential for existing retail floorspace to improve their turnover productivity (e.g. smaller goods could be sold from a smaller area for more money, increased opening hours, etc.).
Sales Density	Retail capacity figures are expressed in term of floorspace, relying on the application of assumed sales density figures to the surplus expenditure identified. This is based on the typical turnover of a store by square metre/foot.
Special Forms of Trading	Defined by Experian as expenditure not directed to traditional floorspace such as the internet, mail order, party plan and vending machines and other non-store activity such as market and road-side stalls.
Study Area	This represents the household survey area, which is based on postal sectors.
Trade Draw	This refers to the level of trade attracted to a particular facility/centre.
Turnover	The turnover figure relates to the annual turnover generated by existing retail facilities.

Town Centre	A town centre will usually be the second level of centres after city centres and, in many cases, they will be the principal centre of centres in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability.

1.0 Introduction

1.1 Brief

1.1.1 WYG Planning ('WYG') was commissioned by Wirral Council to undertake a Retail and Centres Study for the Metropolitan Borough of Wirral. The key purpose of this Study is to act as the evidence base to assist in the formulation of future development plan policy and land use allocations, as well as providing baseline information to assist in the determination of planning applications for potential retail and leisure development. The Study supersedes the previous retail and leisure Study completed in March 2016 on behalf of the Council, namely the Wirral Retail and Leisure Study Update.

1.1.2 This Study will be used to inform policy in the emerging Wirral Local Plan. The Local Plan is anticipated to be adopted in 2020 and will identify how land is used and help determine what will be built where.

1.2 Aims & Objectives

1.2.1 The main objective of this Study is to provide a National Planning Policy Framework (NPPF[1]) (February 2019) and National Planning Policy Guidance (NPPG[2]) compliant Retail & Town Centre Study, which provides the Council with an up-to-date objective assessment of retail and leisure development needs, together with a clear understanding of retail and leisure provision and potential strategic responses/recommendations.

1.2.2 The Study explores retail and commercial leisure need over a fifteen year period to 2034 and provides an up to date review of the performance of the centres within Wirral. The objectives of the Study are to:

- review relevant national and local retail and leisure planning policy as a context for the Study;
- review relevant demographic, economic and commercial retail and leisure trends and forecasts identifying current and future challenges to Wirral's town centre;
- assess the current pattern of convenience and comparison goods shopping, food and beverage, cultural and leisure offer in Wirral and identify deficiencies in provision;
- consider the impacts of retail developments (within and outside the Borough) on the Borough's established key town and traditional suburban shopping centres;
- carry out health check assessments of the sub-regional centre of Birkenhead and the Borough's 4 town centres, 3 district centres and the 16 local centres (as listed in Policy CS25 of the draft Core Strategy Local Plan, December 2012);

[1] https://www.gov.uk/government/publications/national-planning-policy-framework--2
[2] https://www.gov.uk/government/collections/planning-practice-guidance

- identify the future retail and leisure capacity/quantitative needs for the town and district centres;
- review the appropriateness of the hierarchy identified in the emerging Wirral Local Plan;
- review and, if necessary, propose amendments to the thresholds for retail impact assessments identified in the 2016 Study;
- provide a review of the defined retail frontages and boundaries;
- review the town centre boundaries for effectiveness and appropriateness; and
- provide recommendations on a retail and commercial leisure strategy/vision for the town centres in Wirral.

1.2.3 This Study is underpinned by two pieces of new empirical research. First, we have commissioned NEMS Market Research to undertake a new shopping survey of 1,100 households. The Study Area for the survey comprises 11 zones which are based on postcode areas grouped around one or more of the existing town centres.

1.2.4 The second area of empirical research has been in relation to the assessment of the health of the defined town, district and local centres. This exercise has incorporated land use surveys of these defined centres, along with a review of health check indicators and an appraisal of the qualitative results of the household survey data.

1.2.5 The Study is also informed by industry research having regard to published recognised retail and leisure data including demand/requirements from retail and leisure operators for presence in the defined town centres.

1.3 Structure of Study

1.3.1 Our Study is structured as follows:

- Section 2 - summarises the current national and local planning policy context for retail and leisure development issues in Wirral;
- Section 3 - provides a context for the Study by summarising the current and emerging key retail and leisure trends in the UK;
- Section 4 - sets out the key market research which informs the Study;
- Section 5 - analyses retail market shares and patterns in the Study Area;
- Section 6 - sets out our qualitative assessment/overview of the vitality and viability of the town, district and local centres within Wirral;
- Section 7 - provides our assessment of the need for further convenience and comparison goods retail floorspace over the assessment period;

- Section 8 - sets out our assessment of the need for further commercial leisure floorspace over the assessment period; and
- Section 9 - summarises our key findings and sets out our recommendations.

2.0 Planning Policy Context

2.1 Introduction

2.1.1 Given that this Study seeks to provide evidence to assist in the production of the Councils' new Local Plan, it is important to review existing national planning policy of pertinence to retail, leisure and town centre matters to explore the context for the Study and how it may impact upon the production of future development plan policy.

2.1.2 This section also provides an overview of the Council's policies, insofar they are relevant to retail and town centre matters. A more detailed review of relevant national and local planning policy is also contained at **Appendix A**.

2.2 National Planning Policy

2.2.1 National Planning Policy for England is contained within the National Planning Policy Framework (NPPF) (February 2019). The main theme of the NPPF is that there should be 'a presumption in favour of sustainable development'.

2.2.2 The NPPF recognises the need to ensure the vitality and viability of towns and cities and support the role that they play at the heart of local communities by taking a positive approach to their growth, management and adaption.

2.2.3 Paragraphs 86 and 89 respectively, require local planning authorities to adopt a sequential approach and require an impact assessment (if the development is over a proportionate, locally set threshold) for retail and commercial leisure development outside of town centres which are not in accordance with an up-to-date Local Plan.

2.3 Local Planning Policy Context

2.3.1 The development plan for the Wirral consists of saved policies of the Wirral Unitary Development Plan (UDP), adopted in February 2000, the Joint Waste Local Plan for Merseyside and Halton (adopted July 2013) and 'made' Neighbourhood Development Plans (NDP) for Hoylake (December 2016) and Devonshire Park (December 2015). However, planning officers in the Council have confirmed that the policies contained within the draft Core Strategy (December 2012) are also used for development management purposes. The Hoylake NDP includes a number of policies (HS1-HS5) relevant to Hoylake Town Centre, covering active frontages, new development, public space, the evening economy and upper floor uses.

Wirral UDP (2000)

2.3.2 The main retail and town centre policies of relevance within the Wirral UDP are as follows:

Policy SHO1: Principles for New Retail Development

2.3.3 The Policy establishes the Council's objective to sustain and enhance the viability and vitality of the defined centres and other areas of shopping provision in the Borough.

Policy SH1: Criteria for Development in Key Town Centres

2.3.4 The policy identifies that proposals which fall into Use Classes A1-A3 and D1 in Key Town Centre, along with other uses appropriate for a town centre location, will be permitted providing they do not undermine the vitality or viability of any of the defined centres.

2.3.5 It also sets out that proposals for Use Class A3 and other appropriate town centre uses are required to satisfy additional criteria, including ensuring there is no negative impacts on amenity as a result of clustering with other similar uses.

Policy SH2: Criteria for Development in Traditional Suburban Local Centres

2.3.6 Similar to Policy SH1, the Policy permits the development of Use Classes A1, A2 and A3 within the defined Traditional Suburban Local Centres subject to satisfying a range of criteria.

Policy SH9: Criteria for Out-of-Centre and Edge-of-Centre Retail Development

2.3.7 The Policy allows for the development of edge and out-of-centre retail development providing that applicants demonstrate that the benefits of the proposed development outweigh the disadvantages when assessed against the Policy criteria.

Policy SH11: Expansion of Retail Parks

2.3.8 The Policy establishes that any proposals to expand, intensify or reconfigure existing retail parks will be subject to the provisions of Policy SH9 to ensure existing defined centres are protected.

Draft Wirral Core Strategy (2012)

Policy CS25: Hierarchy of Centres

2.3.9 The Policy defines the four tiers of defined centre in the Borough, with Birkenhead being the sub-regional (primary) centre which is to be the focus for retail, leisure, tourism and other town centre related development. The Policy also sets guidelines for what is considered to be suitable scales of development in each centre tier – proposals which exceed these guidelines will be subject to the criteria of Policy CS26.

Policy CS26: Criteria for Development in Existing Centres

2.3.10 The Policy supports the development of Use Classes A1-A5, B1, C1, D1, D2 and other main town centre uses within the defined centres providing they are of an appropriate scale, maintain an appropriate street level frontage and adhere to the relevant development management considerations.

2.3.11 The Policy allows for the development of non-retail and main town centre uses subject to a series of criteria being satisfied.

Policy CS27: Food and Drink uses in Existing Centres and Parades

2.3.12 The policy allows for the development of food and drink uses (Use Classes A3-A5) providing they contribute positively to the local environmental quality, do not have an adverse effect on the character and function of the centre or on residential amenity as a result of over-concentration or clustering of similar uses.

Policy CS28: Retail Impact Assessments

2.3.13 Sets the requirement for retail proposals to be accompanied by a retail impact assessment where they are located in edge or out-of-centre locations and exceed a size threshold based on whether the proposals are convenience, comparison bulky goods or comparison non-bulky goods retail floorspace.

Policy CS29: Criteria for Edge-of-Centre and Out-of-Centre Facilities

2.3.14 The Policy establishes the conditions where the development of main town centre uses will be permitted in edge and out-of-centre locations. One of the conditions is that the proposals have to adopt a sequential approach to development and demonstrate that no suitable sites are available in the first within then at the edge of the centres listed in Policy CS25.

2.4 Summary

2.4.1 National planning policy highlights the need to promote the vitality and viability of town centres through a town centre first approach and a defined hierarchy of centres. Applicants for main town centre uses are required to pass the sequential approach to site selection and provide a full assessment of the impact on the vitality and viability of protected centres. The Wirral UDP and Draft Core Strategy follow the general trend of the most recent national policy guidance, identifying a hierarchy of centres and the town centre first approach.

2.4.2 As required by this commission, policy recommendations on the basis of updates to the evidence base and national guidance are provided in Section 9.

3.0 Current/Future Retail & Commercial Leisure Trends

3.1 Introduction

3.1.1 In order to set out the wider context for the Study and inform our advice on the need for additional retail and leisure floorspace in Wirral, we summarise prevailing retail and leisure trends and the Governments response to 'transform town centres' below and provide a more detailed overview of each at **Appendix B**. Our overview draws on recognised retail and leisure data sources, including research by Experian, Global Data and Mintel.

3.2 Prevailing Retail/leisure Trends

The Changing Retail Climate

3.2.1 The last two years have been particularly challenging for retailers. Deloitte report that 2018 was the year that saw the most store closures and job losses since the 2008 global recession. Retail is an industry which is under pressure with many retailers finding themselves in an uncomfortable position as margins are squeezed between weakening demand and rising costs. In 2019, retailers have continued to experience challenges, these challenges are expected to continue into the near future. The key issues impacting many retailers and town centres in the UK are:

- The continued rise in internet shopping;
- Increased town centre vacancy levels & store closures; and
- The decline in investment due to the uncertainty surrounding Brexit.

<u>The continued rise in internet shopping</u>

3.2.2 The strong increase in online shopping in the past decade has lifted the share of non-store retail sales to a level where at 2018 it accounted for close to 20% of total retail sales, in comparison to just below 5% in 2008. It is estimated that the value of internet sales in 2018 totalled some £68.1bn.

3.2.3 Non-store retailing is to continue to grow rapidly, outpacing traditional forms of spending. It is anticipated to continue to increase at a faster pace than total retail sales until at least 2028.

Increased town centre vacancy levels & store closures

3.2.4 In the first half of 2019, a net 1,234 stores disappeared from Britain's top 500 town centres compared with a 222 store loss over the equivalent period in 2017. Many retailers have found themselves struggling to pay their rents and other overheads, such as a rising minimum wage and business rates. This together with consumers doing more of their shopping online has resulted in a large number of national retailers restructuring or going into administration.

3.2.5 Current trading conditions for a number of retailers are difficult. Store closures/changes can result in particularly significant impacts at medium/smaller sized town centres, which tend to be the subject of higher vacancy rates, and which have also often suffered related reductions in rental levels and footfall in recent years.

3.2.6 Birkenhead Town Centre itself has experienced a number of store closures, the most notable one being the closure of the town centre Marks & Spencer in April 2018. Whilst the town centre House of Fraser store is not currently on any store closure list, the future of the store is uncertain given the recent announcements by its owners.

Uncertainty surrounding Brexit

3.2.7 At the time of writing, the final outcome of the Brexit negotiations remain uncertain. If an exit arrangement is finally approved by Members of Parliament plans will be in place to proceed with the terms of a final trade deal including a one-year transition period. However, if a deal cannot be reached and further extensions are agreed to the Brexit process the UK will continue to face uncertainty which will have an impact on investment decisions.

3.2.8 The remaining part of 2019 and 2020 will be an uncertain period for the UK consumer. It is difficult to predict what will happen given that so much depends on the nature of the UK's exit from the EU.

The Continued Rise of the Grocery Discounter

3.2.9 Consumers have changed their shopping habits in recent years, turning away from food superstores to discount grocers (principally Aldi and Lidl), who are benefitting from increases in their market share. The discount grocers continue to have ambitious store opening targets in the coming years whilst the 'Big Four Grocers' look to continue to develop their smaller 'top-up shopping' store formats and reconfigure/refurbish their existing stores to include concessions.

The Food & Drink Sector

3.2.10 In recent years, town centres have increasingly relied upon an expanding food and drink sector to bring some vacant units back into active use. Food and drink operators now require units which are in the retail heart of a centre. However, over the last year there is evidence that the food and drink market is becoming saturated with numerous operators restructuring, closing outlets, or going into administration.

Other Commercial Leisure Uses

3.2.11 There are a number of emerging leisure concepts which are also helping to anchor retail environments, including bowling alleys, virtual reality zones, trampolining and crazy golf. These concepts can assist centres in providing a point of difference with the competition, ensure that visitors' dwell times are increased, and assist a town's evening economy. A number of the concepts do however, require reasonably large footprint units/space which primarily due to physical constraints, town centres are not always able to provide/offer.

3.3 Governments Response to 'Transform Town Centres'

Changes in Permitted Development Rights and Use Classes

3.3.1 In October 2018 MHCLG issued a consultation document titled 'Planning Reform: Supporting the high street and increasing the delivery of new homes. The changes which the Government has now adopted (25th May 2019) to support greater diversity and footfall on the high street following the 'Planning Reform' consultation include the following amendments to the GPDO:

- A new class JA of the General Permitted Development Order (GPDO) which permits a change of use of a building from a use falling within Class A1 (shops), Class A2 (financial and professional services), or Class A5 (hot food takeaways) or from use as a betting office, pay day loan shop or launderette, to a use falling within Class B1(a) (offices).
- In Class M (residential conversion from A1 shops, A2 offices, betting or pay day loan shop), A5 take-aways have been added to the pre-existing uses that can be changed to residential, together with a clarification of the retail impact assessment that is required.
- Part 4, Class D (temporary use of various business premises) has been amended by enlarging the uses to which the use of the specified business premises can be changed to include Class D1(a) (the provision of any medical or health services except the use of premises attached to the residence of the consultant or practitioner), Class D1(d) (the display of works of art (otherwise than for sale or hire)), Class D1(e) (museum), Class D1(f) (public library or public reading room), or Class D1(g) (public hall or exhibition hall). The single period of the temporary use has been extended from 2 to 3 years.

3.3.2 The regulations do not include the proposed PD right allowing upward extensions to create new housing, though the government's consultation response said it still intends to proceed with this.

Business Rate Relief

3.3.3 In his 2018 Budget the Chancellor confirmed the Government will cut business rates by a third for small town centre retailers/businesses with a rateable value of less than £50,000 for two years.

3.3.4 During this time, the Government also announced the introduction of a digital services tax from April 2020. The Government is proposing a 2% tax rate against the sales that large digital companies make in the UK.

Funding to Support Town Centres

3.3.5 The Government's 'Towns Fund' (which comprises the 'Stronger Towns Fund' and 'Future High Street Fund') involves a total fund of £3.6bn to support struggling town centres. Overall, the Government has invited 100 town centres to develop proposals for funding from the fund. The towns eligible for support from the fund include places with industrial and economic heritage but have not benefitted from economic growth in the same way as more prosperous areas.

3.3.6 Plans are to be drawn up by communities, businesses and local leaders with the purpose of transforming their town's economic growth prospects focusing on improved transport, broadband connectivity, skills and culture. The Government intends to publish a prospectus to guide towns through the process and to set eligibility criteria for funding.

3.3.7 A total of £241m is available to support towns in 2020-2021, and the 100 towns can bid for up to £25m each.

3.4 Potential Impact of Trends on Centres within Wirral

3.4.1 Birkenhead Town Centre, and the Borough's other town and district centres continue to face a number of challenges, particularly from increasing competition from the internet, business rates, multichannel retailing, polarisation of retailing, and out-of-centre retail/leisure developments. These challenges will have a significant impact on the performance, vitality, viability and the future strategies of centres.

3.4.2 It is important that the Borough's town and district centres are able to respond to continued changes in the retail and leisure sector and that they provide (or continue to provide) an offer/destination which distinguishes them from competing centres and out-of-centre retail and leisure destinations.

3.4.3 Centre Strategies need to be able to support the continued development/changes in the 'high street' if they are to successfully compete. Such strategies may seek to:

(1) provide a good mix/variety of retail and leisure uses;

(2) attract a mix of additional land uses beyond retail/leisure, including residential, educational, community and office uses;

(3) build on existing cultural/heritage/tourist attractions;

(4) enhance existing town centre markets and speciality retailing;

(5) provide a high quality shopping/leisure experience;

(6) provide convenient, affordable and accessible town centre parking;

(7) promote and encourage events in the town centre;

(8) embrace, and not compete against, multi-channel retailing; and

(9) be responsive to changes in technology (the 'digital high street').

3.4.4 The key purpose of Town Centre Strategies should be to seek to build on the existing individuality of centres, ensuring centres are a focus/hub for their communities, and extend the 'dwell time' and spend of visitors/residents visiting the town centre which in turn will support their vitality and viability.

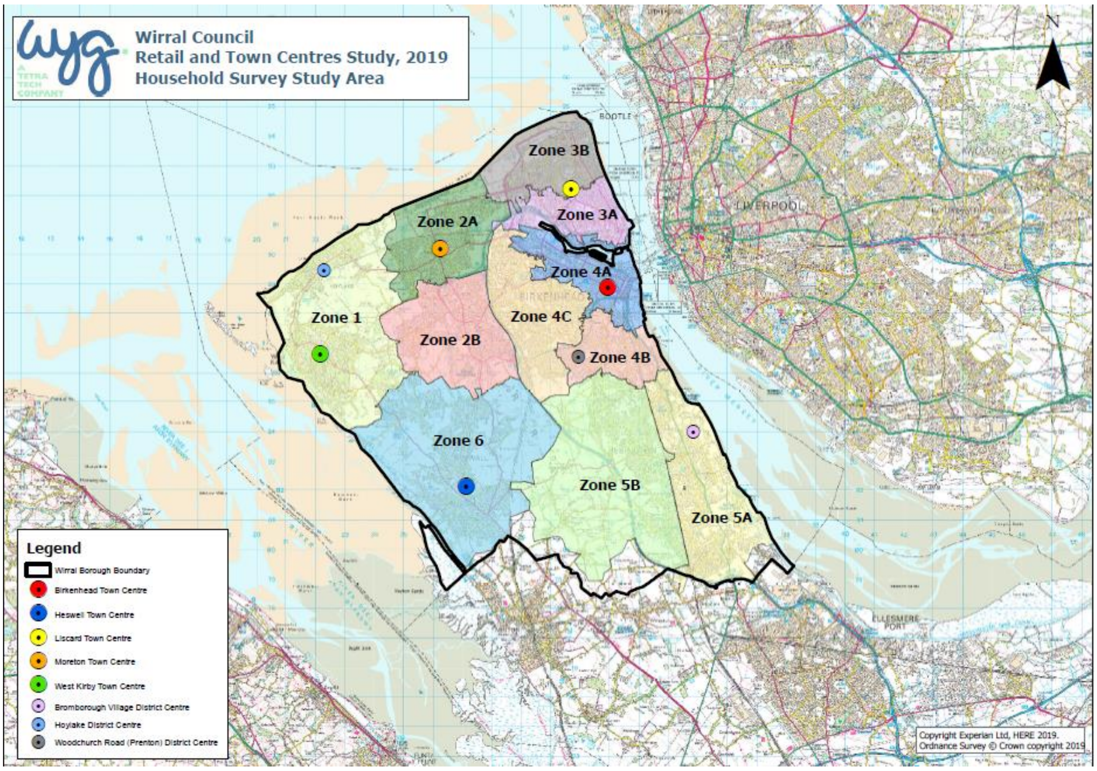
4.0 Original Market Research

4.1.1 A key requirement of this Study is the detailed research and understanding of shopping and leisure patterns in terms of the use of centres and the identification of the centres' catchment areas and this is informed by a telephone household survey.

4.1.2 WYG commissioned specialist market researchers NEMS to undertake a comprehensive household telephone survey to identify consumers' habits and preferences within the Study Area. The undertaking of original market research enables in-depth analysis at a local level and allows the evaluation of the trade draw of particular town centres. The use of specifically commissioned and tailored survey research is fundamental to identifying the likely capacity for future retail and leisure needs across the Study Area within Wirral. Nevertheless, WYG acknowledges that there can be limitations to survey research, particularly with regard to the sample size which can be achieved. The results should therefore be viewed as a broad indication of consumer preferences.

4.1.3 The household survey was undertaken during July and August 2019. The survey involved 1,100 households across a defined Study Area which comprises 11 separate zones, based on postcode sectors. For ease of comparison, both the Study Area and survey zones match those used in previous retail studies. The Study Area, as shown in Figure 4.1 below, covers the whole of the Borough with the exception of a narrow corridor of rural land to the south of the Borough where the postcode sector is mainly within the neighbouring Cheshire West and Chester Council area.

Figure 4.1: Study Area



4.1.4 Figure 4.2 below details the postcode sectors which make up the survey zones.

Figure 4.2 Postcodes by Survey Area

Survey Zone	Postcode Sector
1 - Hoylake and West Kirby	CH47/CH48
2a - Moreton	CH46
2b - Woodchurch, Upton and Greasby	CH49
3a - Liscard South	CH44
3b - New Brighton and Liscard North	CH45
4a - Birkenhead North	CH41
4b - Birkenhead South	CH42
4c - Birkenhead West	CH43
5a - Bromborough	CH62
5b - Bebington	CH63
6 - Heswall	CH60/CH61

4.1.5 The results of the household survey, *inter alia*, are utilised to calculate the expenditure claimed by each existing retail facility within the Study Area, a process which is considered in Section 7.0.

5.0 Retail Market Share Analysis and Retail Provision

5.1 Introduction

5.1.1 Drawing on the findings of the household telephone survey, this section summarises the convenience and comparison goods retail market share patterns within the Study Area. In order to provide some context for these market share patterns, this section firstly:

- provides an overview of the socio demographic context of Wirral;
- sets out the sub-regional centre hierarchy;
- summarises the existing retail provision in Wirral; and
- summarises existing retail facilities within the main competing centres.

5.1.2 A detailed analysis of the convenience and comparison goods retail market share patterns within the Study Area is provided at **Appendix C**. An analysis of existing leisure provision and leisure market share patterns is provided as part of the commercial leisure need assessment set out in **Appendix J**.

5.2 Socio Demographic Context of Wirral

5.2.1 A population profiling exercise has been undertaken utilising the Experian Mosaic database to establish the socio demographic profile of the Borough. A national UK average is also provided to enable a comparative assessment to be undertaken. The breakdown and definition of each Experian Mosaic group is provided at **Appendix D**.

Figure 5.1 – Experian Mosaic Profiling (%)

Mosaic Group	Wirral	UK Average
Population (Adults 18+)	256,340	-
A: City Prosperity	0	4
B: Prestige Positions	10	7
C: Country Living	0	7
D: Rural Reality	0	7
E: Senior Security	13	8
F: Suburban Stability	13	6
G: Domestic Success	7	8
H: Aspiring Homemakers	10	9
I: Family Basics	10	7
J: Transient Renters	11	6
K: Municipal Challenge	5	6
L: Vintage Value	10	6
M: Modest Traditions	8	5
N: Urban Cohesion	1	5
O: Rental Hubs	3	8
U: Unclassified	0	1
Total	100	100

Source: Experian Mosaic Report
Notes: Population derived from Mosaic report – 2017 estimate Adults 18+ / Figures may not add due to rounding

5.2.2 The Experian Mosaic results highlight that when compared to the UK average, Wirral contains:

- a much higher proportion of residents that fall within the 'Senior Security' (older people living comfortably in retirement) and 'Suburban Stability' categories (those with mid-level incomes living in traditional suburban homes);
- a higher proportion of 'Transient Renters' (younger people making interim homes in low cost properties/singles renting short term affordable homes/transient renters of low-cost accommodation);
- a higher proportion of residents within the 'Prestige Positions' category (families with substantial income/retired in sizeable homes/upmarket suburban homes/high achieving);
- a higher proportion that fall within the 'Vintage Value' (dependent elderly renters/those in specialist accommodation/single elderly low value homeowners/longstanding elderly social renters) than the national average;
- a slightly higher proportion of 'Aspiring Homemakers' (younger and settled families in affordable/modest homes/fashion conscious young singles/partners setting up home/young singles renting in family suburbs);

- a much lower proportion of population in the 'Rural Reality' (people living in expanding developments/affordable village homes/inexpensive housing/removed communities within rural locations) and 'Country Living' (prosperous families and older households/retired people living in country houses/small countryside villages) categories;
- a much lower proportion of the population in the 'Rental Hubs' category (younger renters living in City Centre flats/students living in high density accommodation/singles renting affordable private flats);
- a lower proportion of residents within the 'Municipal Challenge' category (long term renters/older social renters/hard-pressed singles/multi-cultural household of social/low cost flats); and
- a lower proportion of those in the 'Urban Cohesion' category (those living in multi-cultural inner-city neighbourhoods/older people living in small inner suburban properties).

5.2.3 The Mosaic results generally highlight that Wirral has a high proportion of 'middle income' residents living in suburban neighbourhoods and a much lower rural population than the UK average.

5.2.4 The socio demographics of a catchment area of a town will, in part, have an impact on the quantum and type of retail and leisure demand in a town centre.

5.3 Sub-Regional Centre Rankings

5.3.1 Figure 5.2 illustrates the position of the principal centres within the hierarchy of centres based on Venuescore's UK Shopping Venue Rankings[3]. The index ranks over 3,000 retail venues within the UK (including town centres, stand-alone malls, retail warehouse parks and factory outlet centres) based on the current retail provision. Cities, towns and major retail centres are rated using a scoring system which takes account of the presence in each location of multiple retailers – including anchor stores, fashion operators and non-fashion multiples. The rankings in the table represent the position of the centres at the time of the most recent Rankings as well as competing surrounding centres. A more detailed tabulation of retail rankings data is also provided, which shows the historic performance of the centres in the preceding 2010-11 Rankings.

[3] https://www.javelingroup.com/white_paper/white_paper_download_venuescore_2017/

Figure 5.2: Sub-regional Centre Rankings

Centre	Classification	2010-11 Rank	2016-17 Rank	Change in Rank 2011-2017
Liverpool	Major City	4	5	-1
Chester	Major Regional	30	39	-9
Birkenhead	**Regional**	**121**	**137**	**-16**
Ellesmere Port	Major District	178	376	-198
Liscard (Wallasey)	**Major District**	**628**	**492**	**+136**
Heswall	**District**	**794**	**781**	**+13**
West Kirby	**Minor District**	**1,377**	**1368**	**+9**
Moreton	**Minor District**	**1,319**	**1418**	**-99**
Woodchurch Road, Prenton	**Local**	**1,313**	**1696**	**-383**
Neston	Local	1,961	1775	+186
Bromborough	**Local**	**1,452**	**2377**	**-925**
Hoylake	**Local**	**1,961**	**2377**	**-416**

Source: VenueScore

5.3.2 VenueScore classifies Birkenhead as a 'Regional Centre' and indicates that since 2010-11 its ranking has declined by 16 places. The nearby centres of both Liverpool and Chester are classified as Major City and Major Regional Centres respectively. Both centres rank above Birkenhead and both, like Birkenhead (albeit to a lesser extent), have seen a decrease in rankings, with Liverpool falling 1 place and Chester falling 9 places since 2010-11.

5.3.3 Ellesmere Port lies some 5km from the southern boundary of Wirral and is classified as a Major District Centre. In the 2016-17 rankings, the centre is ranked at 376th place showing a decline of 198 places since 2010-11.

5.3.4 In contrast to the larger centres above, Liscard, Heswall and Moreton town centres have all seen an increase in rankings since 2010-11. Liscard, classified as a Major District Centre by VenueScore, has seen a rise of 136 places from 628 to 492, Heswall rising 13 places, and West Kirby rising by 9 places.

5.3.5 Moreton Town Centre and the district centres of Woodchurch Road, Bromborough and Hoylake have all seen a fall in rankings from 2010-11 to 2016-17. Bromborough has seen the biggest fall in rankings across all centres, dropping 925 places, Hoylake has dropped 416 whilst Woodchurch Road has dropped 383 places.

5.3.6 As discussed, the Rankings are reflective of the presence of national multiple retailers in a particular centre and are therefore a more accurate barometer of the performance of larger centres. Accordingly, towards the lower end of the Rankings, the importance of a centre can be overlooked or amplified based on whether a handful of national multiples are present or not.

5.4 Summary of Existing Retail Provision in Wirral

5.4.1 Provided below is a summary of existing retail provision in Wirral. It reflects the hierarchy of centres as proposed in the 2012 Proposed Submission Draft Core Strategy.

Birkenhead

5.4.2 Birkenhead is the principal shopping and leisure location in Wirral and is located across the River Mersey from Liverpool at the eastern edge of Wirral Peninsula. The town centre provides a mix of retail, service and leisure facilities including some 91,334sq m gross retail floorspace, 6,953sq m retail service floorspace, 20,546sq m leisure service floorspace and 11,392sq m financial and business services floorspace.

Liscard

5.4.3 Liscard Town Centre is part of the wider town of Wallasey and is located approximately 5km to the north of Birkenhead. The centre contains 296 retail and commercial leisure units, accommodating a total of 62,780sq m gross floorspace along Seaview Road, Wallasey Road, Liscard Road and within the Cherry Tree Shopping Centre. Of the commercial floorspace within the town centre, 20,944sq m is occupied by comparison goods retailers, 11,658sq m by convenience retailers, 10,089sq m by leisure service uses and 6,536q m by retail services. In addition, 6,390sq m of floorspace is occupied by financial and business services.

Heswall

5.4.4 Heswall is located on the west of Wirral peninsula close to the border with Cheshire West & Chester. The Town centre is focussed along the alignment of Telegraph Road and extends along Pensby Road, The Mount, May Road and Pye Road, and it accommodates some 35,547sq m of commercial floorspace. 9,901sq m of floorspace is occupied by comparison goods retailers and 9,689sq m by convenience retailers. Of commercial service provision, 5,844sq m of floorspace is occupied by leisure services, 4,771sq m by financial and business services, and 3,899sq m by retail services.

5.4.5 There are no large out-of-centre retail facilities in, or near to Heswall.

Moreton

5.4.6 Moreton is the smallest of Wirral’s four designated town centres. Located in the central northern area of Wirral, it is well connected to surrounding areas and lies approximately 5.7km from Birkenhead Town Centre.

5.4.7 The town centre provides a total of 19,214sq m commercial floorspace, 7,331sq m of which is occupied by comparison goods units. Of the remaining commercial floorspace within the town centre, 4,020sq m is occupied by leisure service uses, 3,076sq m by retail service providers, 2,284sq m by convenience goods retailers, and 1,605sq m by financial and business services.

West Kirby

5.4.8 West Kirby is located to the northwest of Wirral peninsula, approximately 13.5km west of Birkenhead. The Town Centre extends along Banks Road, The Crescent, Dee Lane and Grange Road. The centre accommodates 24,048sq m of commercial floorspace. 6,972sq m of floorspace is occupied by comparison goods retailers, 6,702sq m by convenience goods, 5,147sq m by leisure service providers, 2,603sq m by financial and business services, and 2,408sq m occupied by retail services.

5.4.9 There are no major out-of-centre retail facilities in, or near to West Kirby.

District Centres

5.4.10 There are three designated district centres in Wirral which provide important day-to-day shopping facilities and services to those in surrounding areas.

5.4.11 Bromborough Village District Centre is located approximately 8km to the south east of Birkenhead Town Centre. It accommodates 92 commercial units including a Matalan, Co-op Food and a Poundstretcher store as well as other facilities including public houses, cafes and financial and business services.

5.4.12 Hoylake District Centre is situated at the north western tip of Wirral Peninsula, approximately 2.5km north east of West Kirby. The centre is slightly larger than Bromborough and accommodates 169 retail/service units including a Home Bargains store, Sainsbury’s Local and Co-op convenience stores and Post Office. In addition, the centre also accommodates a wide retail and leisure service offering and a range of financial and business services.

5.4.13 Woodchurch Road (Prenton) District Centre is focussed along Woodchurch Road (A552) which links Junction 3 of the M53 with Birkenhead Town Centre. Accommodating 64 units, the centre contains a strong convenience goods offering, including a Sainsbury’s food store, an Aldi and a Farmfoods frozen food store. In addition to this, there are several comparison goods stores and other retail, leisure and financial & business service offerings.

Local Centres

5.4.14 In addition to the town and district centres listed above, there are 16 smaller designated local centres across Wirral which provide local shopping facilities to residential areas. Figure 5.3 provides a summary of the number of units in each local centre. Further details on each local centre is included at **Appendix G**.

Figure 5.3: Summary of Number of Units in Local Centres

Local Centre	Number of Units
New Ferry	112
Claughton Village	38
Dacre Hill	21
Eastham	21
Greasby	38
Irby Village	37
Laird Street	54
Lower Bebington	34
New Brighton Seabank Road	40
New Brighton Victoria Road	39
Oxton Road	36
Borough Road/Prenton Park	36
Seacombe, Poulton Road	90
Tranmere Urban Village	21
Upton Village	70
Wallasey Village	100

Main Out of Centre Retail & Leisure Locations

5.4.15 In terms of out-of-centre retail and leisure provision, there are several retail/leisure parks in Wirral. Figure 5.4 below provides details of the main out of centre retail locations and sets out the current key occupiers.

Figure 5.4: Details of Main Out of Centre Retail Locations

	Distance from Nearest Centre	Key Occupiers
Junction One Retail Park (Bidston Moss)	3.7km	Aldi, M&S Foodhall, CarpetRight, Tapi Carpets, Halfords, B&Q, Home Bargains, Pets at Home, Pure Gym, Oak Furnitureland
The Rock Retail Park, Birkenhead	750 metres	Wickes, B&M, Matalan, Food Warehouse, Home Bargains
Marine Point Retail & Leisure Park	2.2km	Morrisons, Iceland, Home Bargains
Croft Retail and Leisure Park, Bromborough	2km	Argos, Bensons for Beds, Boots, Card Factory, Carpet Right, Carphone Warehouse, Clarks, Currys, PC World, Dreams, Dunelm, H&M, Halfords, JD Sports, M&S, Mothercare, Next, Outfit, Pets at Home, Poundland, SCS, Smyths, Sports Direct, Superdrug, The Range, The Works
Upton Retail Park	600 metres	Sainsbury's, Argos, Homebase

5.4.16 There is also a good provision of standalone out-of-centre foodstores in Wirral, including the following large foodstores:

- Tesco Extra, Bidston Moss;
- Aldi, Hoylake Road, Moreton;
- Asda, Welton Road, Bromborough;
- Asda, Woodchurch Road, Arrowe Park; and
- Aldi, Bebington.

5.5 Surrounding Main Large Centres

5.5.1 The town centres within Wirral do not operate in isolation and it is important to understand the nature of the existing (and emerging) retail offering in the surrounding 'competing' centres, given that planned improvements could potentially materially impact upon shopping patterns, future performance and overall vitality and viability of the centres.

5.5.2 The surrounding centres/facilities which the household survey results identified as having an influence on shopping patterns in Wirral are: Liverpool; Chester; Ellesmere Port; and the Cheshire Oaks Designer Outlet.

Liverpool

5.5.3 Liverpool is a major city which is home to one of Britain's largest ports and is one of the largest settlements in the North West. It is located on the eastern bank of the River Mersey and is connected to Wirral via the Kingsway (Wallasey) and Queensway (Birkenhead) Tunnel. Liverpool has close linkages with Halton, Knowsley, Sefton, St Helens and Wirral, which together comprise the Liverpool City Region Combined Authority (LCRCA). The city is the social, cultural, financial and commercial centre of Merseyside and as a result, it exerts a significant influence on the surrounding region.

5.5.4 Liverpool is ranked in the top 5 of Venuescore's UK Shopping Venue Rankings and is a major retail and leisure destination. The city centre has several large shopping centres including Liverpool ONE which provides over 170 retail units, has contributed significantly to an increase in visitor numbers and has improved the City's retail offer. Other smaller shopping centres include Clayton Square Shopping Centre, St Johns Shopping Centre, Cavern Walks and the Metquarter.

Chester

5.5.5 Chester is located to the south east of Wirral, approximately 32km driving distance from Birkenhead Town Centre. Chester's unique historic character makes a significant contribution to the economy, employment and tourism of the city. Chester is a popular destination for tourists and is well known for its Roman history and medieval architecture. Major attractions include the city walls, Chester Cathedral and the Amphitheatre as well as Chester Racecourse and Chester Zoo.

5.5.6 The city centre is identified as a 'Major Regional Centre' by VenueScore and it sits at the top of the hierarchy of centres within the adopted Cheshire West & Chester Council Local Plan.

Ellesmere Port

5.5.7 Ellesmere Port is a large town located to the south east of the border between Wirral and Cheshire West and Chester local authority. The Cheshire West and Chester Local Plan confirms Ellesmere Port, alongside Chester, Northwich and Winsford as the main focus for development in the area. As a town centre within the settlement hierarchy, the local plan identifies a requirement of between 2,700 and 5,600sq m of convenience floorspace in the Town Centre by 2030, but no comparison goods floorspace capacity.

5.5.8 The town centre is classified by VenueScore as a 'Major District Centre' and it provides a moderate shopping offer but it is heavily influenced by the large out-of-centre Cheshire Oaks Designer Outlet on the south east edge of the town.

Cheshire Oaks Designer Outlet

5.5.9 Cheshire Oaks Designer Outlet is the largest outlet village in the UK with over 140 stores. Situated south east of Ellesmere Port and located just off Junction 10 of the M53, the centre is easily accessible from across the region and from further afield and therefore attracts over 8 million visitors a year.

5.5.10 The centre is currently undergoing a programme of redevelopment which started in 2018 to create 25 retail more units, additional leisure provision, new public spaces and improved car parking and accessibility. The redevelopment will be the centre's sixth expansion since the outlet opened almost 25 years ago, emphasising the strong and continued growth of this leading retail and leisure destination. There is also a Marks and Spencer superstore adjacent to the outlet village along with the Coliseum Shopping Park which includes large Debenhams and Next stores.

5.6 Shopping Patterns

5.6.1 This section contains a summary of the convenience and comparison-goods shopping patterns for each of the town centres in Wirral. Both main and top-up convenience food shopping patterns have been analysed, as well as combined comparison-goods shopping patterns. As noted earlier a detailed assessment of shopping patterns is set out at **Appendix C**.

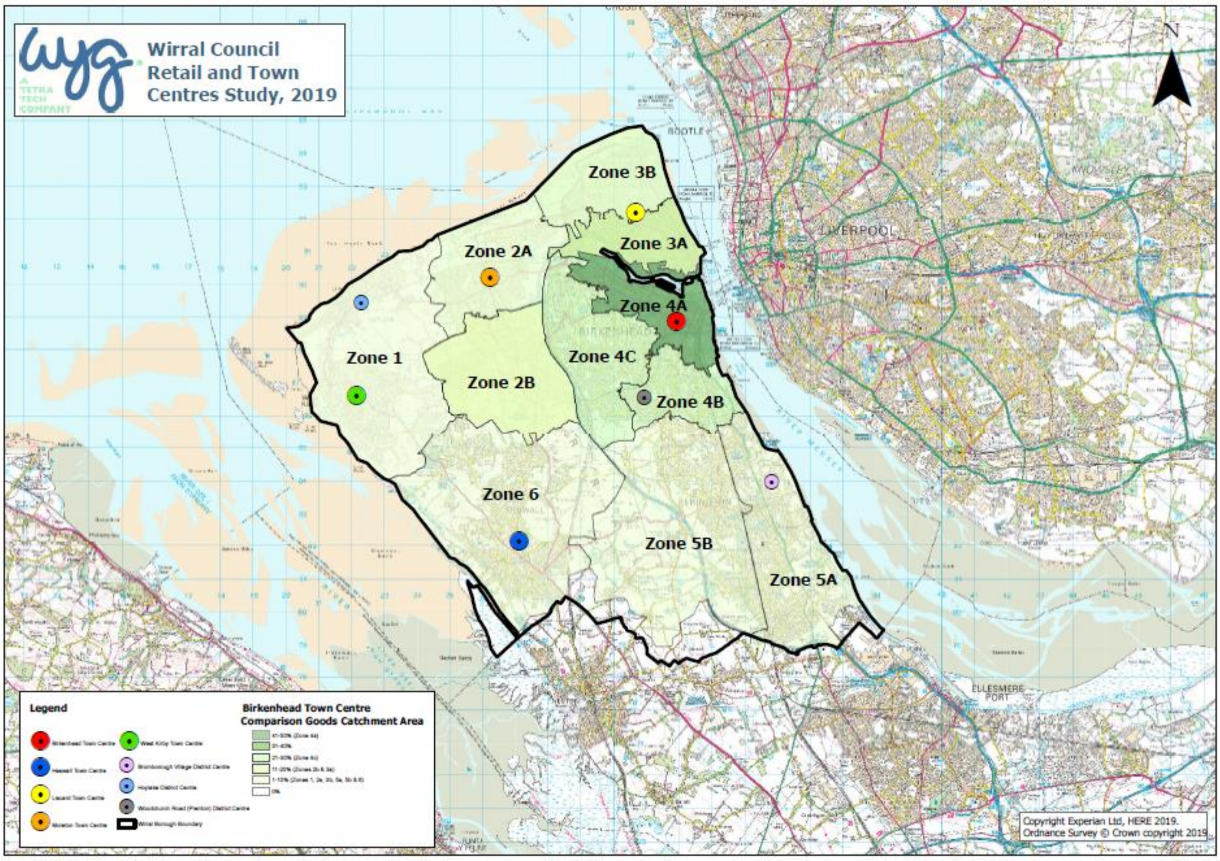
Birkenhead

5.6.2 Almost three quarters of main food shopping trips made from Birkenhead are retained within the town, with approximately 50% split between town centre and out-of-centre stores. Birkenhead also attracts main food shopping trips from across the rest of Wirral, with the majority of these trips made to out-of-centre stores.

5.6.3 In terms of top-up food shopping, the vast majority of trips from Birkenhead residents are made to stores in the town. Although compared with main-food shopping trips, a greater proportion of top-up food shopping are undertaken in smaller convenience stores located mainly outside of the town centre. Aldi at Laird Street is the most popular out-of-centre destination whilst Asda on Grange Road remains the most popular town centre destination.

5.6.4 Comparison goods retailers in Birkenhead have an influence across Wirral, attracting trips from each of the household survey zones. In total, 24% of all shopping trips across Wirral are made to retail facilities in Birkenhead, 14% made to the town centre and 10% of trips made to out-of-centre facilities. From its local zone (Zone 4a), Birkenhead Town Centre attracts 41% of trips whilst out-of-centre facilities attract some 15% of trips. Figure 5.5 below shows Birkenhead Town Centre's comparison goods catchment area.

Figure 5.5: Plan Showing Birkenhead Town Centre Comparison Goods Catchment Area



Liscard

5.6.5 Foodstores in Liscard Town Centre attract just 44% and 40% of main food shopping trips from its local zones (Zones 3a and 3b). Stores in the town centre also have a moderate influence on shopping patterns across the rest of Wirral and attracts a small number of main food trips from Moreton, Birkenhead, Woodchurch, Upton and Greasby. Liscard Town Centre attracts a slightly lower proportion of top-up food shopping trips than main-food shopping trips (34% and 39% from Zones 3a and 3b respectively).

5.6.6 Comparison goods retailers in Liscard Town Centre attract approximately 10% of shopping trips from the town (Zones 3a and 3b) but has little influence on the rest of Wirral.

Heswall

5.6.7 Almost three quarters of main food shopping trips from Heswall residents are retained by facilities in the town (Zone 6), with two thirds of trips made to stores in the town centre. A similar proportion of top-up food trips from Heswall are retained in the town (Zone 6) although a higher proportion of these trips are made to stores outside of the town centre.

5.6.8 Heswall has a limited influence on comparison goods shopping patterns across Wirral. Facilities in the town attract 2% of all comparison goods shopping trips across the Study Area, including 16% of trips from the town (Zone 6) itself.

Moreton

5.6.9 Foodstores in Moreton retain just over a quarter of main food shopping trips from residents of the town (Zone 2a), but attract only a limited number of trips from elsewhere. We note that retention rates in the town for top-up food shopping are much higher. The out-of-centre Aldi store on Hoylake Road is the most popular main-food destination while the in-centre Iceland and Tesco Express stores are the most popular for top-up food shopping.

5.6.10 Due to its size, Moreton does not attract a high proportion of comparison goods shopping trips, with just 8% of trips by local residents made to the town (Zone 2a).

West Kirby

5.6.11 The Morrisons store at Dee Lane is the most popular main food shopping destination in West Kirby, followed by Aldi at Bridge Road. Overall, foodstores in the town retain just over half of the main food shopping market share from the town (Zone 1) and are also shown to draw trips from the surrounding area, notably Woodchurch, Upton and Greasby.

5.6.12 In terms of top-up food shopping, a slightly lower proportion of shopping trips are retained within the town (Zone 1) compared to main food shopping and fewer trips are made to the town from elsewhere.

5.6.13 West Kirby has a limited influence on comparison shopping patterns from outside of the town from which 12% of shopping trips are retained. Survey results indicate that a small number of trips are made from Moreton, Heswall and Woodchurch, Upton & Greasby to the town.

Internet

5.6.14 The household survey results identify that books, CDs and DVDs are the most commonly bought items online, alongside small and large electrical goods and toys, games, bicycles and other sporting or recreational goods. Chemist goods and DIY items are the least common comparison goods to be purchased online.

5.6.15 For convenience food shopping, between 1% and 8% of respondents from each survey zone did their shopping online.

5.6.16 In terms of how items purchased online are received, results show that all convenience goods were received by home delivery, over 89% of comparison goods were home delivered, while purchases of chemist goods were most commonly collected from stores.

Change in Shopping Patterns between 2016 & 2019

5.6.17 Broad comparisons between expenditure figures from 2016 and 2019 show that the retention levels of convenience goods spending within Wirral have remained at the same level (98%), however expenditure has reduced at stores in Birkenhead Town Centre and risen in out-of-town stores across Wirral.

5.6.18 As with convenience goods, the comparison goods expenditure patterns remain comparable with figures from 2016, although the retention of spending within Wirral has increased from 68% to 72%. The increased retention rate indicates a strengthening of the comparison goods sector in Wirral which is supported by a proportionate increase in expenditure in Birkenhead, Liscard, Moreton and Heswall Town Centres.

5.7 Summary

5.7.1 The above sections set out the existing retail provision within Wirral, surrounding competing centres and an assessment of the shopping patterns of residents within the Study Area. The subsequent sections provide health checks and our qualitative assessment of any retail or commercial leisure related deficiencies within each of the centres.

6.0 Qualitative Health Check Assessments of Centres

6.1 Introduction

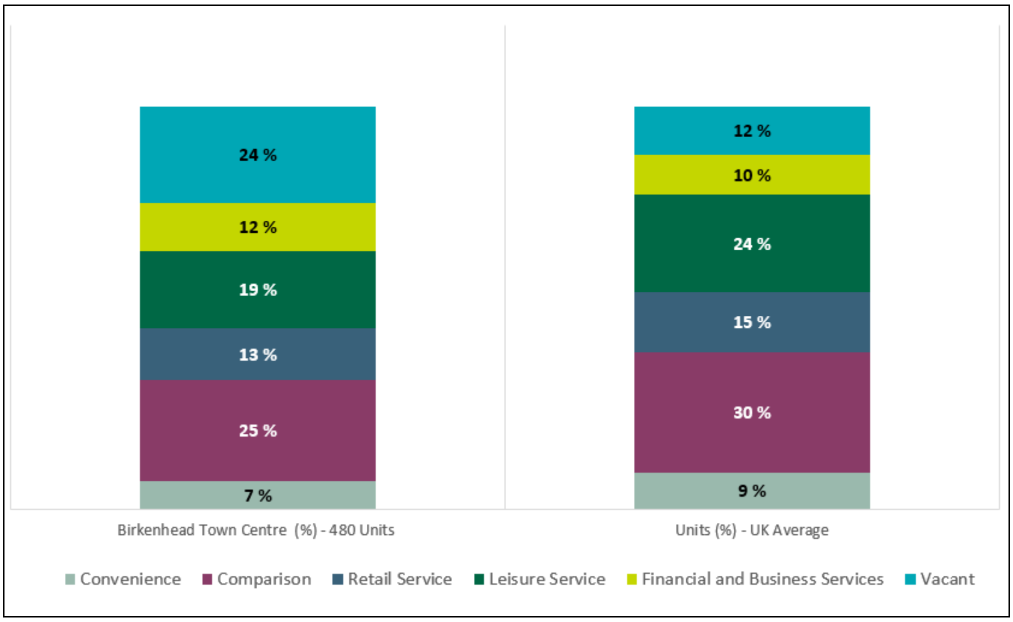
6.1.1 This section provides a summary of the detailed qualitative health check assessments undertaken for Birkenhead Sub-Regional Town Centre and each of the other town, district and local centres across Wirral. These assessments can be found at **Appendices E-G.**

6.1.2 The health check assessments are based on indicators published in the National Planning Policy Guidance (NPPG) which are used to assess the vitality and viability of each centre. Details of the criteria within the NPPG and of the methodology utilised for the health checks is contained at **Appendix H**.

6.2 Birkenhead Sub-Regional Town Centre

6.2.1 Figures 6.1 and 6.2 provide a summary of the composition of Birkenhead Town Centre in terms of the proportion of units and floorspace occupied by each of the Experian Goad town centre use categories in comparison to the UK average.

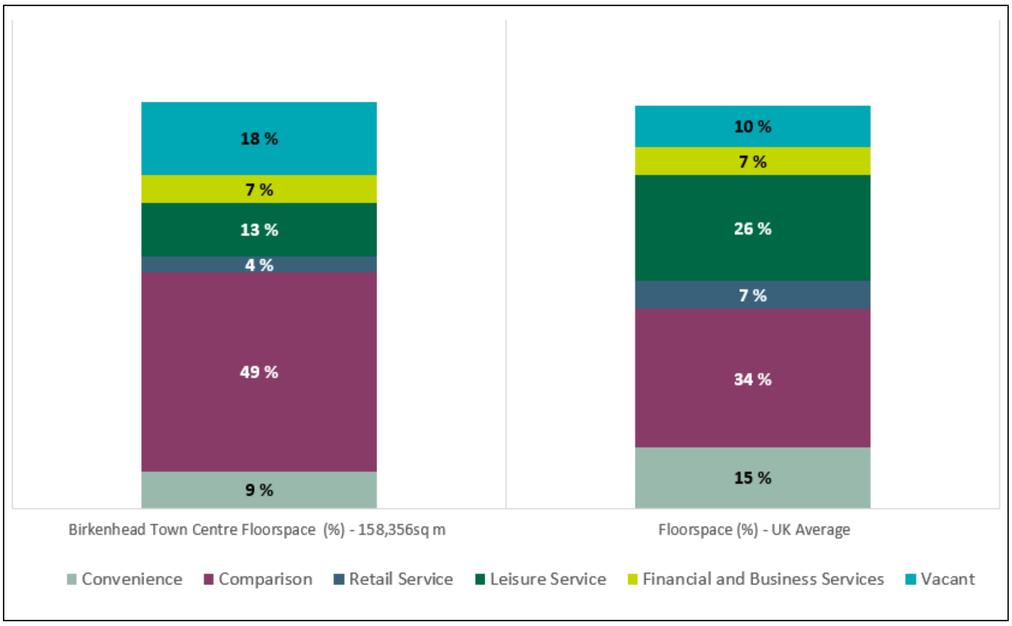
Figure 6.1 – Composition of Birkenhead Town Centre by Commercial Units



Source: Experian Goad Surveys
Notes: Figures may not to 100% due to rounding

6.2.2 The proportion of units occupied in Birkenhead Town Centre for each use category is generally lower than the national average apart from financial and business services which occupy 12% of units in the town centre (2% higher than average), as shown in Figure 6.1. The high number of vacancies within the town centre (24% of units) is double the national average of 12% and in part explains why the proportion of other use categories is low.

Figure 6.2 – Composition of Birkenhead Town Centre by Commercial Floorspace



Source: Experian Goad Surveys
Notes: Figures may not to 100% due to rounding

6.2.3 In terms of floorspace, comparison goods retailers occupy a higher proportion in Birkenhead Town Centre than the national average (49% vs 34%) (Figure 6.2). However, the proportion of floorspace given to convenience goods, retail services and leisure services is below the average. Again, this is in part due to the high proportion of vacant floorspace across the town centre (18%), which is a significantly higher proportion than the national average (10%).

6.2.4 Our health check assessments of Birkenhead Town Centre find that it displays reasonable levels of vitality and viability. We consider that the principal strengths, weaknesses, opportunities and threats to the centre are as follows:

Strengths and opportunities

- There is a reasonably good representation of national multiple and independent retailers.
- Hamilton Square, to the north of the town centre, is an area of high environmental and architectural quality. There is an opportunity to use the square for more public events.
- The Birkenhead Market site presents an opportunity for redevelopment and regeneration of this area of the town centre.

- Good Wi-Fi coverage and digital connectivity across Birkenhead.
- Declining rental prices may make the town centre more attractive to some operators.

Weaknesses and Threats

- Some areas of the centre suffer from poor environmental quality and poor connectivity.
- There is a weak offer serving the evening economy, particularly in restaurant provision.
- There is a lack of other non-retail main town centre uses.
- High vacancy rate with particular concentrations of vacant units in key parts of the centre.
- The potential closure of the House of Fraser store.
- Conway Street presents a significant barrier to pedestrian connectivity.
- The proximity of Liverpool, which has a greater draw, presents a challenge in getting outside investment.

6.2.5 Birkenhead benefits from the fact that the Council are actively seeking to bring forward the regeneration of the town centre. Wirral Growth Company, a 50-50 partnership between Wirral Council and Muse Developments, has been established. Plans are currently being formulated for the redevelopment of land comprising the Market, bus station, The Europa Centre, and land to the north of Conway Street including The Vue Cinema, Europa Pools Leisure Centre and Price Street Car Park through the Birkenhead Regeneration Framework. The plans could include a new business district alongside leisure space, an improved market and extensive public realm improvements.

6.2.6 Birkenhead Town Centre has also been successful in reaching the second stage of the Future High Streets Find. If funding is secured, there could be further opportunities to bring forward improvements/regeneration within the town centre.

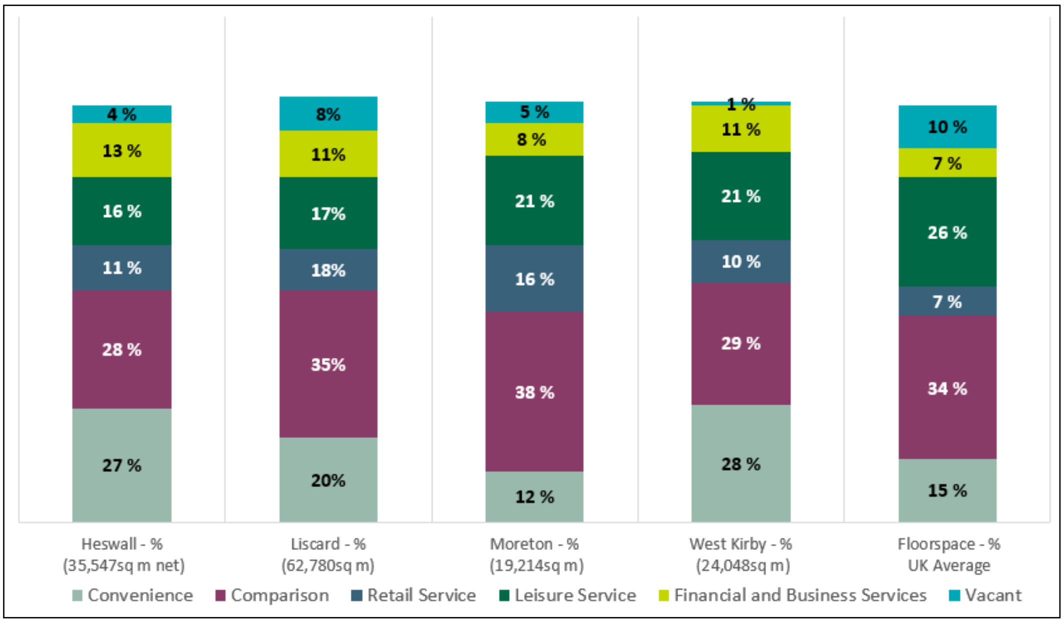
6.3 Town Centres

6.3.1 Figures 6.3 and 6.4 below provide a summary of the composition of the other town centres in Wirral (Heswall, Liscard, Moreton and West Kirby), breaking down the proportion of floorspace and units within each centre, alongside the national average.

6.3.2 In terms of convenience goods, only West Kirby Town Centre accommodates a higher than average proportion of units in this use category (28%) with the others falling slightly below average (15%). In floorspace terms, Moreton is the only centre to accommodate a lower than average proportion of convenience goods space at 12% vs the national average of 15%.

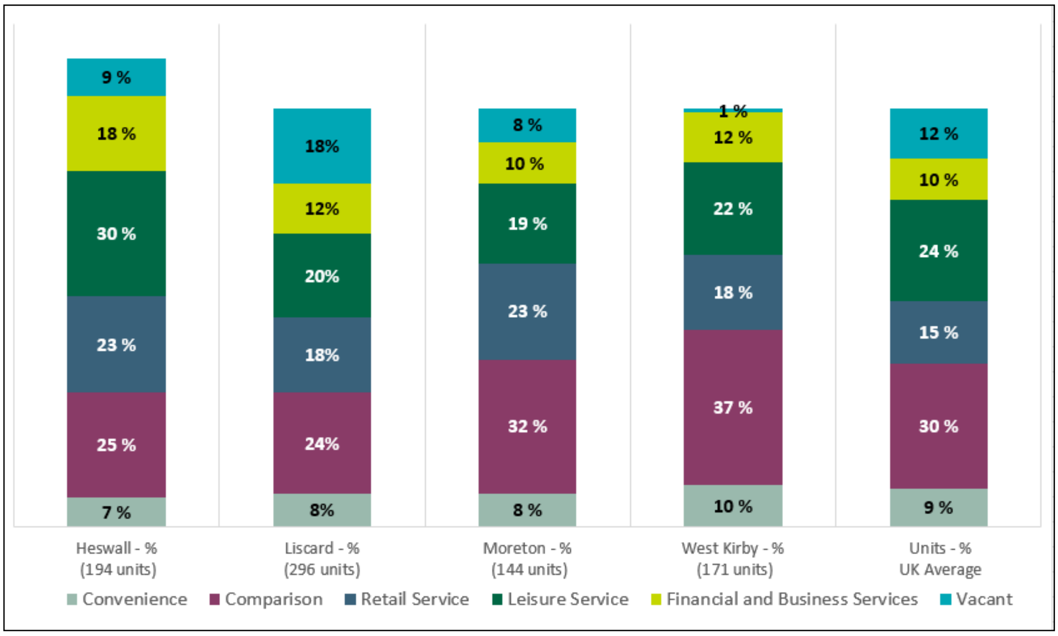
6.3.3 Moreton and West Kirby town centres accommodate a higher proportion of comparison goods units than average, however in floorspace terms, Moreton and Liscard have an above average provision of comparison goods with Heswall and West Kirby's provision falling below the national average floorspace of 34%. Given the size and role of these centres, this isn't unexpected, and we do not consider this necessarily to be indicative of any deficiency of provision.

Figure 6.3 – Composition of other Town Centres by Commercial Units



Source: Experian Goad Surveys
Notes: Figures may not to 100% due to rounding

Figure 6.4 – Composition of other Town Centres by commercial floorspace



Source: Experian Goad Surveys
Notes: Figures may not to 100% due to rounding

6.3.4 As would be expected for smaller town centres, an above average proportion of units and floorspace is accommodated within each town centre for retail and for financial & business services. In terms of vacancies, we are encouraged that vacant floorspace within each town centre is below average, although we note that Liscard does accommodate a significantly higher proportion of vacant units than the UK average (18% vs 12%).

Heswall Town Centre

6.3.5 Overall, we assess Heswall Town Centre to display good levels of vitality and viability. We consider the principal strengths, weaknesses, opportunities and threats to the centre as follows:

<u>Strengths and Opportunities</u>

- The centre has a strong convenience goods sector.
- There is a varied leisure offer that supports a strong evening economy.
- Good evening economy (for its size and role).
- The centre provides a good range of independent traders adding variety and distinctiveness.
- There is a low vacancy rate which has continued to decrease over recent years.
- The environmental quality of the centre is considered good with attractive buildings in the street scene and attractive green spaces.
- Good range of events throughout the year for a centre of its size.
- Low crime rates.
- Good financial and business service sector.

<u>Weaknesses and Threats</u>

- The lack of large modern commercial units may mean that the requirements of potential future operators/occupiers are not met.
- The centre is poorly served by digital facilities and Wi-Fi coverage is limited.
- There is a limited catchment population.

Liscard

6.3.6 Liscard Town Centre is considered to display reasonable levels of vitality and viability although there are several issues that any future town centre strategies should seek to address. We consider the key strengths, weaknesses, opportunities and threats to the centre are as follows:

Strengths and Opportunities

- The centre is accessible by a range of transport options.
- Retail service provision is considered to be good.
- There are potential opportunities to better utilise the public realm and pedestrianised area of Liscard Way for events.
- Good digital facilities.
- The levels of recorded crime have reduced in recent years.
- Potential to enhance the public realm in the pedestrianised area.
- The development of a masterplan, which has secured funding form the LCR Mayoral Towns Fund, provides a good opportunity to develop positive strategies to improve and enhance the centre and positively plan for its future development.

Weaknesses and Threats

- The centre provides an above average and increasing number of vacant units.
- The comparison goods offer has weakened over recent years and is heavily skewed towards discount retailing.
- The centre contains a high number of takeaway units.
- The majority of the centre is geared towards day-time uses and lacks activity during the evenings.
- The environmental quality of the centre is reasonably poor and requires investment.
- The proximity of larger centres and out-of-centre retail parks in Birkenhead and Liverpool may limit the attractiveness of Liscard to new operators.

Moreton Town Centre

6.3.7 Our health check assessment of Moreton finds that the town centre displays reasonable levels of vitality and viability:

Strengths and Opportunities

- The vacancy rate in the town centre is reasonably low and has decreased over recent years.
- There is a good independent occupier offering.
- Potential opportunities exist to enhance the environmental quality of buildings within the centre.
- The town centre is well connected to the surrounding area by private and public transport links.

- There is a decreasing crime level.
- The partially cleared sites of Pasture Road provide an opportunity for future development.

Weaknesses and Threats

- Some parts of the centre provide a poor level of environmental quality and are in need of enhancement.
- The centre provides more discount and lower quality retailers than other town centres.
- There is a comparatively high number of charity shops and takeaway units in the town centre.
- Limited facilities serving the evening economy.
- Lack of medium sized foodstore capable of accommodating a main food shop.
- Lack of operators with requirements for a presence in the town centre.

West Kirby Town Centre

6.3.8 Overall, West Kirby town Centre is assessed to display good levels of vitality and viability. The principal strengths, opportunities, weaknesses and threats to the centre are considered as follows:

Strengths and Opportunities

- Strong convenience goods provision with two anchor foodstores present within the centre.
- Good comparison goods offer (for its size) covering a reasonably wide range of goods.
- A good independent retailer presence offering high end/quality goods.
- The centre displays good environmental quality with architectural character.
- Good financial and business service provision.
- Low vacancy rates in the centre.
- Falling crime levels.
- Opportunity for some cosmetic improvements and additional planting.
- Whilst a reasonably good leisure service provision feedback from users identify that further services would encourage them to visit the town centre more often.

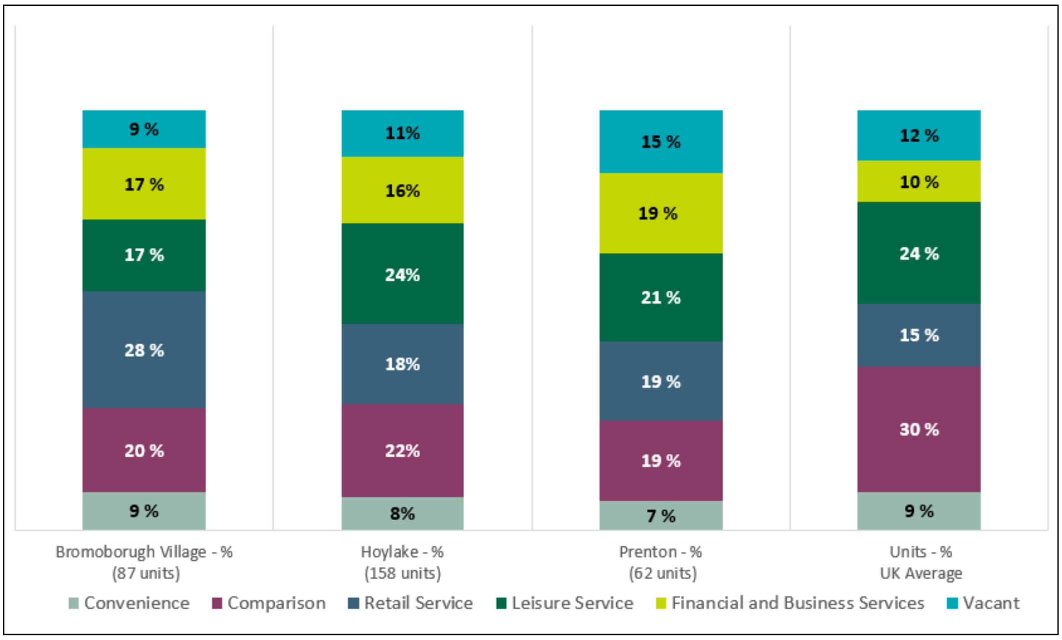
Weaknesses and Threats

- There are currently no identified operator requirements in the centre.
- A lack of available units/sites to accommodate new operators/retailers.
- Relatively high number of charity shops present.

6.4 District Centres

6.4.1 The composition of each district centre in terms of units is shown in Figure 6.5 below.

Figure 6.5 – Composition of District Centres by Commercial Units



Source: Experian Goad Surveys
Notes: Figures may not to 100% due to rounding

6.4.2 As would be expected in smaller centres, the proportion of retail service and financial & business service units in Wirral's district centres is above the national average. The proportion of comparison goods units is lower than average, while the proportion of units given over to convenience goods is broadly in line with the UK average. Vacancies in Bromborough Village and Hoylake are lower than average but is slightly higher in Prenton (Woodchurch Road) at 15% vs a national average of 12%.

<u>Bromborough Village District Centre</u>

6.4.3 Overall, Bromborough Village is a reasonably healthy district centre. The centre provides a good range of commercial uses which meet the daily requirements of local residents and it is accessible by a range of public and private transport options. The environmental quality of the centre is mixed with some areas of the centre in need of some investment.

<u>Hoylake District Centre</u>

6.4.4 Hoylake is a healthy district centre. With the exception of banking/building society services, the centre provides a good range of retail and service provision. Its uses cater to local and more niche needs and there is a strong representation of restaurants supplemented with other uses which support an evening economy. The environmental quality is considered to be good with recent improvements made in some areas.

Prenton (Woodchurch Road) District Centre

6.4.5 Prenton (Woodchurch Road) is a reasonably healthy centre benefitting from two anchor foodstores that bring activity and vibrancy to the area. The range of uses are good for the size and role of the district centre. However, a comparatively high number of vacancies and the busy through road detract from the environmental quality of the centre.

6.5 Local Centres

6.5.1 The composition of each of the 16 designated local centres is provided in Figure 6.6 below. With the exception of New Ferry and Seacombe local centres, all of the local centres in Wirral are considered to display reasonable or healthy levels of vitality and viability.

6.5.2 New Ferry Local Centre was badly affected by a gas explosion in March 2017 which destroyed and damaged a number of buildings. At the time of writing, the local centre contains 37 vacant units. Whilst a number of these are vacant waiting potential demolition, even excluding these units, the centre has a high vacancy level. In addition to the high vacancy level, the overall level of environmental quality in the centre is considered to be poor and in need of enhancement. In order to respond to the current issues in the local centre the Council is actively seeking to bring forward the regeneration and redevelopment of the area and has produced a residential led masterplan. Funding has recently been secured from the Liverpool City Region Combined Authority and we understand that compulsory purchase orders are currently being explored to enable the potential delivery of new residential development. The Council are currently through to the second stage of bidding for a share of the Governments Future High Streets Fund, if this is successful it presents the opportunity to develop and enact positive strategies to enhance and improve the centre

6.5.3 Seacombe Local Centre, like New Ferry, is one of the largest local centres in Wirral, accommodating some 90 units. Whilst the centre offers a good range of retail and service uses, the high number of vacant units (36) mean that the environmental quality of the centre is compromised. We recommend that the Council investigate mechanisms to improve the appearance and enhance the quality of the public realm within the centre in order to make it more attractive to operators and users. Given the size of the centre and number of vacancies, we also recommend that the Council consider consolidating the boundary of the centre by reducing its eastern and western extent.

6.5.4 In addition to the above, our surveys of New Brighton and Lower Bebington local centres, identify that both centres currently contain a reasonably large vacant unit previously occupied by food retailers (Co-op in Lower Bebington, Budgens in New Brighton). Whilst both centres display good levels of vitality and viability, we recommend that the Council consider engaging with the landlords of these properties to see if they could assist with bringing forward their re-occupation.

Figure 6.6: Composition of Local Centres by Units

Local Centre	Conven-ience	Compar-ison	Retail Service	Leisure Service	Financial & Business Service	Vacant	Total
Claughton Village	3	6	7	12	4	4	36
Dacre Hill	4	5	10	7	2	3	21
Eastham Mill Park Drive	3	7	6	6	0	1	19
Greasby	4	7	9	9	3	0	32
Irby Village	2	8	8	9	1	1	29
Laird Street	6	7	9	8	1	9	53
Lower Bebington	1	6	7	7	5	6	32
New Brighton (Seabank Road)	3	11	7	5	2	12	40
New Brighton (Victoria Road)	2	6	11	14	0	4	37
New Ferry	15	17	18	14	8	37	109
Oxton	3	6	11	7	1	6	35
Prenton Park	11	6	13	12	1	1	36
Seacombe	7	14	12	12	2	36	90
Tranmere Urban Village	5	4	5	4	0	1	19
Upton Village	9	6	21	20	4	7	67
Wallasey Village	9	12	28	29	6	8	92

7.0 Quantitative Retail Needs Assessment

7.1 Introduction

7.1.1 This section of the Study provides a summary of our detailed assessment of the retail needs undertaken for each of the 5 town and 3 district centres. Detailed assessments of the convenience goods and comparison goods capacity can be found at **Appendix I.**

7.1.2 In considering the capacity figures, it should be noted that the NPPF no longer requires local plans to meet the needs 'in full' in the plan period. Given the uncertainty in forecasting long term retail trends, policies only need to look at least ten years (in this case to 2029), and not necessarily over the full plan period when allocating sites to meet the 'likely' needs for town centre uses.

7.2 Potential Capacity for Future Convenience Goods Floorspace

7.2.1 The convenience goods residual expenditure/floorspace capacity figures for the 8 town/district centres, before taking into account commitments and planning permissions, are summarised in Figure 7.1 below. For the avoidance of doubt the expenditure and floorspace capacity figures identified for each year are not cumulative figures. They represent the capacity between the base year (2019) and the year identified and should not be added together. For example, the capacity figures identified at 2029 represent the capacity between 2019 and 2029 and the capacity figures identified at 2034 represent the capacity between 2019 and 2034. If planning permission is granted for retail floorspace say in 2029 the floorspace requirement/capacity identified for the years 2029 and 2034 would both reduce by the same amount.

7.2.2 Figure 7.1 shows that, by 2029 (the minimum timeframe identified by the NPPF when allocating sites), after commitments, there will be no need/capacity for additional convenience floorspace in Birkenhead, primarily due to convenience goods stores in Birkenhead under- trading. The findings suggest that there is an over-provision of convenience goods facilities in the town.

Figure 7.1: Quantitative Need for Convenience Goods Floorspace

	Surplus Expenditure	Commitments	Residual	Floorspace Requirement
	£m	£m	£m	(sq m net)
Birkenhead				
2019	-31.5	NA	-31.5	-
2024	-32.2	NA	-32.2	-
2029	-31.1	NA	-31.1	-
2034	-29.8	NA	-29.8	-
Liscard				
2019	2.8	NA	2.8	200
2024	2.5	NA	2.5	200
2029	3.5	NA	3.5	300
2034	4.5	NA	4.5	400

Year	Surplus Expenditure	Commitments	Residual	Floorspace Requirement
	£m	£m	£m	(sq m net)
Heswall				
2019	6.5	NA	6.5	600
2024	6.5	NA	6.5	600
2029	7.1	NA	7.1	600
2034	7.7	NA	7.7	700
Moreton				
2019	7.2	NA	7.2	600
2024	7.2	NA	7.2	600
2029	7.4	NA	7.4	700
2034	7.7	NA	7.7	700
West Kirby				
2019	13.6	NA	13.6	1,200
2024	13.7	NA	13.7	1,200
2029	14.1	NA	14.1	1,300
2034	14.6	NA	14.6	1,300
Bromborough Village District Centre				
2019	3.6	NA	3.6	300
2024	3.6	NA	3.6	300
2029	3.7	NA	3.7	300
2034	3.7	NA	3.7	300
Hoylake District Centre				
2019	5.8	NA	5.8	500
2024	5.9	NA	5.9	500
2029	5.9	NA	5.9	500
2034	6.0	NA	6.0	500
Woodchurch Road (Prenton) District Centre				
2019	17.1	NA	17.1	1,500
2024	17.2	NA	17.2	1,500
2029	17.6	NA	17.6	1,600
2034	18.1	NA	18.1	1,600

Source: Tables 5-10, Appendix Iii
Notes:
Floorspace Requirement - Average sales density assumed to be £11,134/sq m (@ 2019) based on the average sales density of all grocery operators - derived by GlobalData.com.
Allows for increased turnover efficiency.
2017 Prices

7.2.3 In contrast to Birkenhead, existing convenience goods stores in West Kirby are assessed to be over-trading with floorspace capacity of some 1,300sq m net identified over the next 10 years.

7.2.4 There is also identified to be some capacity, albeit limited, for additional convenience goods floorspace in the other three towns of Liscard, Heswall and Moreton.

7.2.5 There is also assessed capacity for additional convenience floorspace in the three district centres in Wirral. For Woodchurch Road (Prenton), primarily due to both the Sainsbury's and Aldi stores overtrading, there is potential capacity for an additional convenience goods facility. Lower levels of floorspace capacity are identified for the other two district centres of Bromborough Village and Hoylake (less than 500sq m net).

7.3 Potential Capacity for Future Comparison Goods Floorspace

7.3.1 The assessment identifies that as the main comparison goods retail destination in Wirral, Birkenhead, after commitments/planning permissions, is assessed to have the greatest level of floorspace requirements by 2029 (1,100sq m net). This requirement is assessed to increase to some 5,600sq m net by 2034.

7.3.2 In terms of the other town centres in Wirral, only limited comparison goods capacity is identified over the next 10 years (less than 300sq m net). In the longer term (end of plan period), Liscard is assessed to see the largest level of capacity (1,200sq m net) whilst the other towns is assessed to have capacity of less than 800sq m net.

7.3.3 Turning to the district centres, there is only very limited capacity identified in both the next 10 years and plan period. However, comparison goods capacity in Bromborough Village at the end of the plan period is anticipated to be circa 800sq m net.

Figure 7.2: Quantitative Need for Comparison Goods Floorspace

	Surplus Expenditure £m	Commitments £m	Residual £m	Floorspace Requirement (sq m net)
Birkenhead				
2019	0.0	-	0.0	-
2024	0.0	2.9	0.0	-
2029	11.1	3.3	7.9	1,100
2034	48.1	3.7	44.4	5,600
Liscard				
2019	0.0	NA	0.0	-
2024	0.0	NA	0.0	-
2029	2.0	NA	2.0	300
2034	8.5	NA	8.5	1,200
Heswall				
2019	0.0	NA	0.0	-
2024	0.0	NA	0.0	-
2029	1.2	NA	1.2	200
2034	5.2	NA	5.2	800
Moreton				
2019	0.0	NA	0.0	-
2024	0.0	NA	0.0	-
2029	0.6	NA	0.6	100
2034	2.5	NA	2.5	400
West Kirby				
2019	0.0	NA	0.0	-
2024	0.0	NA	0.0	-
2029	0.8	NA	0.8	100
2034	3.4	NA	3.4	500

	Surplus Expenditure	Commitments	Residual	Floorspace Requirement
	£m	£m	£m	(sq m net)
Bromborough Village District Centre				
2019	0.0	NA	0.0	-
2024	0.0	NA	0.0	-
2029	1.1	NA	1.1	200
2034	4.7	NA	4.7	800
Hoylake District Centre				
2019	0.0	NA	0.0	-
2024	0.0	NA	0.0	-
2029	0.2	NA	0.2	30
2034	0.7	NA	0.7	100
Woodchurch Road (Prenton) District Centre				
2019	0.0	-	-	-
2024	0.0	0.6	-	-
2029	0.5	0.7	-0.2	100
2034	2.1	0.8	1.3	400

Source: Appendix Iiii
Notes:
Allows for increased turnover efficiency.
2017 Prices

7.4 Summary

7.4.1 The above assessment identifies that by 2029 (the minimum timeframe identified by the NPPF when allocating sites), after commitments, there is nil convenience goods capacity in Birkenhead. West Kirby is assessed to have potential floorspace capacity of approximately 1,300sq m net with more limited amounts of convenience goods floorspace capacity identified in the other three towns of Liscard, Heswall and Moreton. There is also potential capacity for an additional convenience goods facility in Woodchurch Road (Prenton) District Centre with reasonably limited levels of capacity identified for the other two district centres in Wirral.

7.4.2 In terms of comparison goods capacity by 2029, as the largest centre in Wirral, the majority of comparison goods floorspace capacity is identified in Birkenhead (circa 1,100sq m net). Across the other town and district centres in Wirral, only limited comparison goods capacity is identified in each centre over the next 10 years (less than 300sq m net).

8.0 Commercial Leisure Needs Assessment

8.1 Introduction

8.1.1 This section of the Study provides a summary of our detailed assessment of the commercial leisure needs undertaken for the centres across Wirral. The assessments, found at **Appendix J,** use data gathered from the household survey to understand how leisure facilities in Wirral currently meet the needs of the population. The results from this, coupled with the use of national statistics for the typical level of provision for specific types of leisure facilities, and reference to estimated increases in the Study Area population are then used to inform our judgement in respect of the likely future needs.

8.2 Leisure activities participation and provision

8.2.1 The assessment finds that visiting restaurants is the most popular leisure activity across the Study Area, with an average of 72% of respondents in each survey zone visiting such facilities. Other popular activities include visiting the cinema, visits to pubs and bars, and visiting cafes and coffee shops.

8.2.2 When asked about what additional facilities Wirral residents would like to see more of, non-commercial leisure facilities were the most common answers. Of the commercial leisure facilities mentioned, an increase in the number of bars and pubs was the most popular request, with 3% of total responses and other facilities typically receiving 1-2% of responses each. However, 54% of respondents indicated that they would not like to see any more leisure facilities, indicating that broadly half of residents in Wirral are generally satisfied with the current available leisure provision.

8.3 Restaurant & Cafes/Coffee Shops

8.3.1 Overall, our analysis finds that the restaurant and café/coffee shop provision varies across Wirral. The retention levels and influence of restaurant facilities in Birkenhead are relatively low for the size of the town, while in Heswall, they are considered very good.

8.3.2 Retention levels in Birkenhead are affected by the close proximity of Liverpool, which has a much larger offer, but it also points to a deficiency in provision within the town centre, where there are opportunities for additional leisure floorspace, especially around the cinema.

8.3.3 Our analysis finds that the restaurant and cafe retention levels in the rest of the Borough are what we would have expected, given the size and role of the other centres.

8.4 Health & Fitness Facilities

8.4.1 Based on participation rates and the small projected increase in the population of Wirral, there may be a quantitative need for new health, fitness and gym facilities in the Borough over the next 10 years.

8.4.2 Based on trip analysis, we assess there to be an under provision of health, fitness and gym facilities in Birkenhead Town Centre. We note that a national gym operator is currently seeking premises in the town, and opportunities should be explored to deliver this need.

8.4.3 We do not identify any particular deficit in provision elsewhere in the Borough and we note that a low proportion of respondents to the survey indicate that they would like a new gym facility in their local area. Overall, the forecast and outstanding operator requirements indicate that Wirral could potentially accommodate 1-2 additional health & fitness facilities over the next 10 years, and we recommend that this need is accommodated within Birkenhead.

8.5 Cinemas

8.5.1 The cinema provision in Wirral consists of 3 large-scale multi-screen operators and 1 smaller scale independently run drive-in facility. The Light Cinema in New Brighton attracts nearly 50% of all cinema trips from across Wirral, the Odeon at Croft Retail Park attracts 25%, and the Vue Cinema in Birkenhead Town Centre attracts 15%.

8.5.2 Although centrally located, the Vue Cinema in Birkenhead is not particularly well located in relation to the rest of the town centre. The cinema has no complementary leisure uses in the locality such as restaurants and bars, and nearby vacant land presents an opportunity to enhance this area of the town and make the cinema more of an attractive destination.

8.5.3 Based on the current market share and the number of existing screens in Wirral, our analysis indicates that there is not a need to plan for additional cinema facilities at present. We note that a new 2-screen facility is currently under construction in Hoylake however, and this will meet any additional demand for cinema facilities in Wirral for the foreseeable future. If any further proposals come forward, we recommend they are judged on their own merits in accordance with relevant town centre planning policy at the time of any application's submission.

8.6 Tenpin Bowling

8.6.1 There are currently 2 ten-pin bowling facilities in Wirral, Riverside Bowl on Marine Promenade in New Brighton, and Bromborough Bowl located to the north east of Bromborough. Overall, we consider this provision to adequately meet the requirements of the population of Wirral although at the present time, we note that a ten-pin bowling operator is currently looking for floorspace in Birkenhead. We recommend therefore, that should any proposals for such development be forthcoming, they are judged on their own merits in accordance with relevant town centre planning policy at the time of the submission of an application.

8.7 Bingo

8.7.1 There are currently 2 permanent bingo halls in Wirral; Gala Bingo in Birkenhead Town Centre, and Buzz Bingo at the Croft Retail and Leisure Park. Responses to the household survey indicate that additional bingo activities take place in several other locations within the Study Area too, including social clubs and community centres.

8.7.2 Only a small proportion of respondents to the household survey (6%) indicated that they visit bingo facilities. Given that current trends for bingo halls show that activity is increasingly moving online instead of physical venues, and the existence of 2 large venues the Borough already, we do not consider that there will be a requirement for an additional bingo facility in Wirral. We recommend that, if any demand arises in the future, proposals for such development are judged on their own merits in accordance with relevant town centre planning policy at the time that an application is submitted.

8.8 Arts and Cultural Facilities

8.8.1 Arts and cultural activities play an important role in providing distinct identity to settlements and places, and they are also an important contributor to the local economy. For the purposes of our assessment, consideration has been given to the provision of theatres, museums and art facilities within Wirral.

8.8.2 Presently, 21% of trips to arts and cultural facilities are retained within Wirral with most of the other trips made across the Mersey to Liverpool. Within Wirral, the Floral Pavilion Theatre attracts the most trips with the Lady Lever Art Gallery in Port Sunlight the second most popular destination.

8.8.3 The popularity of Liverpool as a destination is not surprising given the easy access and proximity to Wirral and status as a nationally important cultural centre. The city has a wide choice of facilities and is a major visitor/tourist destination.

8.8.4 Demand for additional provision is likely to be limited due to the location of existing more comprehensive cultural facilities in Liverpool. Accordingly, we recommend that no new facilities need to be planned for, but if any future proposals for such development come forward, they are judged on their merits in accordance with relevant town centre planning policy at the time of submission. In order to maintain and improve current visitor numbers in Wirral, however, consideration should be given to ways of further promoting existing facilities and improving existing marketing strategies.

9.0 Key Findings & Recommendations

9.1 Summary of Identified Need

9.1.1 The quantitative need findings identified in each centre within Wirral are summarised in the figure below:

Figure 9.1: Quantitative Capacity Summary (to 2029))

Centre	Convenience Goods (sq m net)	Comparison Goods (sq m net)	Health & Fitness (no.)	Cinema Screens (no.)	Bingo (no.)	Tenpin Bowling (no.)
Birkenhead	nil	1,100	1-2	Nil	Nil	Nil
Liscard	300	300	Nil	Nil	Nil	Nil
Heswall	600	200	Nil	Nil	Nil	Nil
Moreton	700	100	Nil	Nil	Nil	Nil
West Kirby	1,300	100	Nil	Nil	Nil	Nil
Bromborough Village	300	200	Nil	Nil	Nil	Nil
Hoylake	500	30	Nil	Nil	Nil	Nil
Woodchurch Road	1,600	100	Nil	Nil	Nil	Nil

Notes: Quantitative Capacity figures are post commitments/planning permissions.

9.1.2 The Study identifies that by 2029 (the minimum timeframe identified by the NPPF when allocating sites), after commitments, there is nil convenience goods capacity in Birkenhead, and limited capacity (less than 500sq m net) in Liscard, Bromborough Village and Hoylake. Moreton is assessed to have a capacity of 700sq m net, while West Kirby and Woodchurch Road, primarily due to existing stores overtrading, are assessed to have capacity of circa 1,300 and 1,600sq m net respectively by 2029.

9.1.3 In terms of the identified convenience goods capacity for West Kirby, in the absence of a medium sized foodstore in Hoylake, we consider it likely that Hoylake residents are currently visiting the Morrisons and Aldi stores in West Kirby for their food shopping. We therefore recommend that consideration be given to meeting the needs for a medium sized foodstore in Hoylake rather than West Kirby.

9.1.4 In terms of comparison goods capacity by 2029, as the largest centre in Wirral, the majority of comparison goods floorspace capacity is identified in Birkenhead (circa 1,100sq m net). Across the other town and district centres in Wirral, the estimated capacity is more limited. Liscard has an estimated floorspace capacity of around 300sq m, whilst Heswall Town Centre and Bromborough Village District Centre have a capacity of around 200sq m net. Moreton and West Kirby Town Centres, and Woodchurch

Road District Centre each have an estimated comparison goods floorspace capacity of 100sq m net, whilst Hoylake District Centre has a very limited capacity at only 30sq m.

9.1.5 Whilst a low proportion of respondents to the household survey wanted to see a new gym facility in their local area, the forecast and outstanding operator requirements indicate that Wirral could potentially accommodate 1-2 additional indoor health & fitness facilities over the next 10 years. We assess that this need should be directed to Birkenhead.

9.1.6 When looking at cinema needs across Wirral, it is considered that the existing provision largely meets the needs of the current population. Large facilities already exist in Birkenhead Town Centre, at New Brighton and at the Croft Retail Park, and there is also an additional smaller bespoke drive-in facility in Birkenhead. Given that a new 2-screen cinema has recently been approved as part of the Beacon Arts Village development in Hoylake, we do not consider that is a requirement for any additional new facilities in Wirral in the next 10 years.

9.1.7 For ten-pin bowling, the Study identifies that there are 2 facilities in Wirral that adequately meet the requirements of the population. Accordingly, we do not consider it necessary to plan for a new facility the Borough at this time but should proposals for such a development come forward it should be judged on its own merit in accordance with town centre policies at the time of submission.

9.1.8 In terms of arts and cultural facilities, the Study identifies that existing provision across Wirral is of a scale appropriate to the size of the Borough and its proximity to the major cultural centre of Liverpool. Consideration should be given to ways of further promoting and improving the marketing of existing facilities and any future proposals for arts and/or cultural development be assessed on its own merit.

9.2 Recommended Hierarchy of Centres

9.2.1 In drawing up local plans, Paragraph 85 of the NPPF requests the LPA to define a network and hierarchy of centres.

9.2.2 In the absence of any definition to rely on in the NPPF and the NPPG, the definition of different tiers of the hierarchy provided by the now superseded Planning Policy Statement 4 (PPS4) remains of some relevance. In respect of the definition of town centres, district centres and local centres, PPS4 states the following:

> *"Town centres will usually be the second level of centres after city centres and, in many cases, they will be the principal centre or centres in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability. In London the 'major' and*

many of the 'district' centres identified in the Mayor's Spatial Development Strategy typically perform the role of town centres.

District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.

Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a local centre.

Small parades of shops of purely neighbourhood significance are not regarded as centres for the purposes of this policy statement."

9.2.3 Experian defines the multi-functional offer of a city or town as including residential, public service, leisure and entertainment, commercial and cultural facilities (amongst others) and Annex 2 of the NPPF defines main town centre uses as:

"Retail development (including warehouse clubs and factory outlet centres); leisure, entertainment facilities the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities)."

9.2.4 The previous emerging Core Strategy policy (Policy CS25) identified a hierarchy of retail centres within Wirral. It identifies Birkenhead as a 'Sub-Regional Town Centre and Liscard, Moreton, Heswall and West Kirby as 'Town Centres'. Underneath this, 3 district centres (Bromborough Village, Hoylake and Woodchurch Road) are identified alongside 16 local centres.

9.2.5 This Study identifies that Birkenhead Town Centre continues to perform as an important town centre. The town centre provides a sub-regional role serving the Borough and despite the on-going difficult economic retail climate for town centre comparison goods retailers, has not seen a weakening in its comparison goods market share. It is important for Birkenhead Town Centre to remain a strong sub-regional town centre and for policy to continue to ensure that further potential out-of-centre retail and/or commercial leisure development does not undermine its role in the hierarchy.

9.2.6 In terms of the 4 'Town Centres' of Liscard, Moreton, Heswall and West Kirby, Section 6 and **Appendix E** of the Study examines the health and composition of the centres. The Study finds that all the town centres in the Borough continue to provide town centre retail and service uses and function as town centres.

9.2.7 Turning to the 3 'District Centres', our detailed examination of both Bromborough and Woodchurch Road (Prenton) district centres finds that each provide retail and services akin to a district centre. In terms of Hoylake District Centre, whilst the centre does not provide any banks/building societies it provides all the attributes of a district centre and we recommend should be retained as one.

9.2.8 Whilst we note that the Hoylake Neighbourhood Plan expresses concern with the designation of Hoylake as a district centre, as opposed to a town centre, the retail and services provided in Hoylake are not in line with those of a town centre.

9.2.9 Finally, in terms of the 16 'Local Centres', whilst in varying health, our assessments of the centres at Appendix G show that all continue to meet the day to day needs of their local catchment. Accordingly, we would recommend that the centres are retained as 'Local Centres'.

9.3 Recommended Local Impact Threshold

9.3.1 In accordance with national planning policy, it is appropriate to identify locally set retail thresholds for the scale of edge-of-centre and out-of-centre development which should be subject to the assessment of the impact criteria set out by paragraph 89 of the NPPF. The NPPF sets a default impact threshold of 2,500sq m gross. The NPPG explains that gross retail floorspace is defined as *"the total built floor area measured externally which is occupied exclusively by a retailer or retailers, excluding open areas uses for the storage, display or sale of goods"* (paragraph 16).

9.3.2 When setting a setting a locally appropriate threshold, the NPPG considers the following aspects important:

- scale of proposals relative to town centres;
- the existing viability and vitality of town centres;
- cumulative effects of recent developments;
- whether local town centres are vulnerable;
- likely effects of development on any town centre strategy; and
- impact on any other planned investment.

9.3.3 Following the assessment undertaken within this Study and having regard to, *inter alia*, the current health, performance, unit and floorspace composition of each of the town centres; increasing competition from the internet; and availability of units in the prime shopping area capable of meeting potential national multiple occupiers in each of the centres, WYG does not consider that a blanket threshold is suitable for each centre across Wirral. Instead, our recommendation is that policy should advocate a tiered approach whereby the threshold applied to planning applications at edge-of-centre and out-of-centre locations varies in relation to the size, role and function of a particular centre.

9.3.4 In our experience, it will only generally be development of a greater scale than these impact thresholds that could lead to a 'significant adverse' impact and merit the refusal of an application for town centre uses in accordance with the provisions of paragraph 90 of the NPPF. In setting the thresholds, we have, *inter alia*, had regard to the significant store expansion plans by Aldi and Lidl (minimum of 1,700sq m gross) which often have relatively substantial turnovers.

9.3.5 The thresholds should not only apply to new floorspace, but also to changes of use and variations of conditions to remove or amend restrictions on how units operate in practice. In relation to the proposals to amend restrictions to existing retail units, the floorspace threshold should apply to the relevant planning/retail unit as a whole.

9.3.6 As the main destination in Wirral, Birkenhead Town Centre provides a range of retail and leisure uses which draw shoppers from across the Borough. Having regard to the anchor stores, number of retail units, overall retail floorspace and our vitality and viability findings of the town centre, we recommend that a reasonably conservative threshold of 1,500sq m gross should be considered by the Council. This will provide the Council with sufficient flexibility to assess the merits and potential impacts and implications of edge and out-of-centre retail applications.

9.3.7 Figure 9.2 below also provides our recommended thresholds for the other smaller town and district centres in Wirral. Although smaller than Birkenhead, the town centres of Liscard, Moreton, Heswall and West Kirby still draw shoppers from their surrounding areas albeit to a lesser degree. In terms of Liscard, having regard to the size of the anchor stores, number of retail units and its current health we recommend a threshold of 1,250sq m gross is adopted for all retail development. For the other three towns (Moreton, Heswall and West Kirby), given that their smaller overall size and anchor stores, and taking into account current levels of vitality and viability, recommend that a retail impact threshold of 1,000sq m gross is required to ensure that their vitality and viability would not be significantly impacted upon.

9.3.8 Turning to the three district centres in Wirral, having regard to the larger unit shops within Woodchurch Road (Prenton) and Bromborough, we recommend that a locally set threshold of 750sq m gross should be adopted by the Council. For Hoylake, given that it is characterised by smaller traditional shops, we recommend a smaller retail impact threshold of 400sq m gross should be adopted.

Figure 9.2: Threshold Analysis for Defined Town/District Centres

Centre	Total No. of Retail Units	Total Floorspace (sq m gross)	Anchor Stores and sizes (sq m gross)	Recommended Threshold (sq m gross)
Town Centres				
Birkenhead	480	91,334	House of Fraser (6,684sq m) Asda (7,187sq m) TK Maxx (3,317sq m) Wilko (3,809sq m) TJ Hughes (3,409sq m) Next (2,406sq m)	1,500sq m
Liscard	296	32,602	B&M (3,150sq m) Wilko (2,849sq m) Primark (2,492sq m) Tesco Express (209sq m) Iceland (349sq m)	1,250sq m
Moreton	144	9,615	Home Bargains (1,159sq m) Iceland (862sq m) Tesco Express (364sq m)	1,000sq m
Heswall	194	19,590	Tesco (5,621sq m) M&Co (1,776sq m) Aldi (1,624sq m) M&S (1,545sq m)	1,000sq m
West Kirby	171	13,674	Morrisons (4,194sq m) Aldi (1,377sq m) M&Co (687sq m)	1,000sq m
District Centres				
Woodchurch Road (Prenton)	64	8,348	Sainsbury's (3,685sq m) Aldi (1,589sq m) Home Bargains (907sq m)	750sq m
Bromborough	92	9,644	Matalan (2,727sq m) Co-op (469sq m)	750sq m
Hoylake	169	6,301	Sainsbury's Local (412sq m)	400sq m

Notes: Retail Floorspace/Units = convenience and comparison goods only

9.3.9 Finally, turning to local centres, we recommend that a threshold of 350sq m gross is required. In recommending this threshold we have, *inter alia*, had particular regard to the trading model of the smaller convenience goods store format operated by the likes of Co-op, Sainsbury's and Tesco. Such stores generally have a net sales area slightly below the 280sq m net sales area limit for extended Sunday trading and generally have a gross floorspace approaching 400sq m. Whilst of a relatively moderate size, these convenience stores often have a relatively substantial turnover and it is considered necessary for the local planning authority to retain control in respect of the considerations of impacts arising from the implementation of such proposals.

9.3.10 It is important to stress that whilst the locally set threshold would require the submission of an impact assessment for all edge-of-centre and out-of-centre developments exceeding the thresholds, national guidance states that the impact test should be undertaken in a proportionate and locally appropriate way, commensurate to the scale of development proposed. The level of detail would typically be agreed with planning officers during the pre-application process in order to avoid overly onerous requirements that may otherwise restrict and delay development opportunities from coming forward.

9.4 Recommendations in Respect of the Town Centre's Future Retail & Commercial Leisure Strategy/Vision

9.4.1 The town centre strategies/visions in Wirral need to be able to support the continued development/changes in the 'high street' if they are to successfully compete. As noted earlier in this Study the key purpose of the strategies should be to build on the existing individuality of centres, be a focus/hub for their communities, attract a mix of additional land uses beyond retail/leisure, (including residential, educational, community and office uses) and extend the 'dwell time' and spend of visitors/residents visiting the town centre and in turn the vitality and viability of the centre. The findings/recommendations of this Study are intended to inform the retail and commercial leisure elements of each town centre strategy.

Birkenhead Town Centre

9.4.2 As noted earlier in the study, the Council are actively seeking to bring forward the regeneration of Birkenhead Town Centre. Wirral Growth Company, a 50-50 partnership between Wirral Council and Muse Developments, was established in March 2019. Following consultation, a draft masterplan (see Figure 9.3) has been formulated for the redevelopment of land comprising the Market, bus station, The Europa Centre, and land to the north of Conway Street including The Vue Cinema, Europa Pools Leisure Centre and Price Street Car Park.

9.4.3 The latest draft masterplan (Figure 9.3) identifies:

- the relocation of Birkenhead Market;
- up to 280,000sq m office floorspace;
- a new Civic Hub;
- a new hotel;
- new residential neighbourhood to the north and south of Conway Park Station;
- relocation and development of the leisure centre;
- new public space/public realm; and
- improvements to transport infrastructure and the bus station.

Figure 9.3: Wirral Growth Company Draft Masterplan

Source: Wirral Growth Company

9.4.4 This Study generally supports, in so far as retail and leisure matters are relevant, the approach to Birkenhead's regeneration as proposed by the Wirral Growth Company. We advise/provide comment as follows:

- The masterplan proposals to introduce a mix of additional land uses into the town centre is fully supported by this study (and the NPPF) and will increase town centre footfall, extend 'dwell time', and spend.
- Having regard to the importance of the market to the town centre, its relocation needs to be carefully considered to make sure it better integrates with the rest of the town centre and is in a sufficiently prominent position with good levels of footfall to remain attractive to existing market stall operators and to potential new ones.
- In order for existing retailers and businesses in the town centre to fully benefit from the masterplan redevelopment, the integration and linkages between the masterplan area and the rest of the town centre will be important.
- This study identifies that the town centre evening/night-time economy is in need of improvement. We recommend that the masterplan redevelopment includes a café/restaurant quarter which is as centrally located to the retail core as possible.
- The proposed civic uses will provide an important centrally located hub of community uses which will provide a further reason for residents to visit the town centre and in turn link their trip with other uses in the town centre.

- Hollywood Bowl have an outstanding requirement to open a bowling alley in Birkenhead. We recommend that further discussions take place with Hollywood Bowl to investigate whether their requirements could be accommodated in the masterplan area or elsewhere in the town centre. We are not aware of any sites outside the masterplan area which would be suitable.
- It will be important to seek to provide alternative town centre premises for those retailers/leisure operators which will be displaced as a result of the proposed regeneration plans. Of particular concern would be the loss of the Vue Cinema from the town centre. It's relocation to a more central location in the town centre together with supporting food and drink uses (and potential a bowling facility) would significantly enhance the evening/night-time economy of the town centre.
- This Study identifies that the town centre contains a high number of vacant units. The potential relocation of existing displaced operators resulting from the masterplan development will assist in some of these units being re-occupied. The delivery of the masterplan itself will also make Birkenhead more attractive to operators and investors which could in turn further reduce vacancy levels. For those vacant units located in the more peripheral parts of the town centre the Council should adopt a more flexible approach to allow alternative uses including residential.
- It is recommended that the masterplan development seeks to accommodate the requirement/ identified need for health and fitness facilities in Birkenhead. Alternatively, existing vacant units should be investigated and discussed with potential health and fitness operators to establish whether any would meet their requirements.
- The existing town centre retail core provides a poor level of environmental quality. Whilst, the new masterplan development is likely to involve attractive public realm areas, the existing retail shopping streets are also in need of public realm/environmental enhancement/investment.
- The Study finds that the pedestrian linkage between Birkenhead Central Railway Station and the town centre is poor. We recommend that any wider town centre strategy investigates potential options to improve this linkage.
- Whilst the Study identifies a quantitative need for 1,100sq m net comparison goods floorspace, given the number of vacant units in the town centre and in the absence of any developer/retailer demand for additional floorspace in the town centre in this instance, at the time of writing, we do not consider that the Council should plan for a site/sites to meet this need.
- Given the uncertainty regarding the future of the House of Fraser store, it is recommended that, in order to avoid a potential long-term void in the town centre, the Council investigate a potential refurbishment/redevelopment strategy for the unit at the earliest opportunity. A possible solution, subject to timing, and if House of Fraser do close the store, could involve the relocation of one or more of the operators from The Europa Centre.

- Whilst assessing hotel needs is not part of the remit of this Study, it is noted that, with the exception of the Premier Inn on Conway Street, there is no hotel accommodation in the town centre. We recommend that, subject to the demand from hotel operators, additional centrally located hotel accommodation is considered as part of the masterplan development.

9.4.5 The masterplan development is the biggest redevelopment plans the town centre has seen since the construction of the Asda superstore in 2011. It provides an exciting and transformational substantial redevelopment project. It will be important that the environment of the retail shopping area is also enhanced so it meets existing and new residents/workers expectations. Without an improved shopping environment, it is likely to be more challenging to attract businesses to the office accommodation in the masterplan development area.

9.4.6 We recommend that the findings of this Study, particularly those in relation to the vitality and viability health check assessment of Birkenhead Town Centre, are utilised by the Council in seeking to secure potential funds through the second stage of the Future High Streets Fund.

Liscard Town Centre

9.4.7 Whilst Liscard Town Centre displays reasonable levels of vitality and viability, this study identifies that the centre displays a number of weaknesses which should be addressed in any future strategy for the town centre.

9.4.8 We understand that funding has recently been secured from the Liverpool City Region Mayors Towns Fund which is to be used for the preparation of a masterplan for the town centre. We recommend that the masterplan, in so far as retail and commercial leisure elements are concerned, incorporates/considers the following key elements:

- Seek to repurpose those vacant units which are not in prime A1 retail location to other uses including leisure service and residential uses. Where possible encourage temporary/pop-up uses for vacant units.
- Investigate potential options to help strengthen the town centre evening/night-time economy. by seeking to plan for additional restaurant provision.
- Actively seek to meet the outstanding requirement from a health and fitness operator in the town centre.
- Develop a USP for the town centre. Given its location close to Birkenhead and Liverpool it is recommended that the town centre should seek to differentiate its offer from that of other stronger centres. This should involve building on the town centre independent retailer/occupier offering. As part of this we recommend that, if not already undertaken, the Council should investigate potential opportunities to host events and a market on Liscard Way.

- Undertake a public realm improvement study to investigate potential opportunities to improve the quality of the town centre. We recommend that this includes improvements to street lighting to improve the perception of safety, and a programme of investment into planting/soft landscaping.
- The development of a marketing strategy to improve the perception of the town centre. The marketing strategy should provide an assessment to understand the potential options for promoting existing facilities (including its independent business offering), introducing a programme of events to add activity and vibrancy, and marketing the town centre to other commercial operators.
- This Study identifies that the road gyratory around Mill Lane, St Alban's Road and Liscard Cres can act as a barrier to movement across the town centre. We recommend that the masterplan investigate potential opportunities to help improve the pedestrian/cycle connectivity with the surrounding residential areas.

9.4.9 We understand that a Business Support Grant has been set up to support existing/new businesses in the town centre. This grant is available to be used on shop front improvements and to help the re-occupation of vacant units.

9.4.10 It is important that the town centre strategy/masterplan be prepared in consultation with key town centre stakeholders, businesses and residents. Of particular note, we recommend that 'Love Liscard', a partnership between Wirral Chamber of Commerce, local businesses and Wirral Council, to encourage visitors and investment to the town centre, is involved.

Heswall Town Centre

9.4.11 Our analysis has found that Heswall Town Centre is performing well and displays good levels of vitality and viability. The recommended key elements of the town centre strategy/vision for Heswall, as a result of the findings of this Study, include:

- Investigate ways to attract further investment into the town centre by supporting the continued growth of independent retailers.
- Continue investment and ongoing efforts in maintaining the existing attractive public spaces.
- Continue to build on the success of the town centre in hosting events.
- Review opportunities to embrace the 'digital high street' and support improved free Wi-fi access across the town centre.

9.4.12 The Study identifies a capacity requirement of 600sq m net convenience and 200sq m net comparison goods floorspace for the town centre over the next 10 years. It also identifies that there are currently outstanding operator requirements from a number of operators including Lidl. We are not aware of any site currently available within or on the edge of Heswall Town Centre which could accommodate this need. An out-of-centre site may therefore need to be identified but in potentially identifying a site careful consideration will need to be given to the potential impact on the existing Asda and Aldi stores in the town centre.

Moreton Town Centre

9.4.13 Whilst Moreton Town Centre demonstrates reasonable levels of vitality and viability there are a number of key elements that we recommend any future town centre strategy/vision should accommodate:

- Identify a site to meet the identified needs for a medium sized foodstore in the town centre. The suitability and availability of the vacant site the rear of the library on Pasture Road could provide a potential opportunity.
- Investigate potential options for environmental improvements in the centre to help soften the impact of vehicle traffic travelling through the centre.
- Consider potential opportunities for hosting a market and/or events.
- Engage with owners of properties that currently detract from the environmental quality of the centre to establish potential opportunities for their enhancements. In order to help owners facilitate improvements, the Council may want to consider setting up a Shop Front Improvement Grant Scheme which could fund 50% of project costs up to a maximum figure.

West Kirby Town Centre

9.4.14 Our assessment of West Kirby Town Centre identifies that it displays good levels of vitality and viability. We recommend any future town centre strategy/vision should:

- Consider potential opportunities to enhance the environmental quality around the train station.
- Maintain, and where possible strengthen, the town centre's independent/specialist offering.
- Consult further with residents/business to establish what further leisure provision would encourage them to visit the centre more often.
- Identify potential options to help improve connectivity between the northern and southern areas of the town centre through improved signposting, landscaping and pedestrian access.

9.4.15 The Study identifies that as a result of the overtrading of the town centre Morrisons and Aldi foodstores there is a potential quantitative capacity for a further medium sized foodstore in the town. We are not aware of any sites within, or well connected to, the town centre that would be capable of accommodating a medium sized foodstore.

9.4.16 As noted earlier, in the absence of a medium sized foodstore in Hoylake, we consider it likely that Hoylake residents are currently visiting the Morrisons and Aldi stores in West Kirby for their food shopping. We therefore recommend that consideration be given to meeting the needs for a medium sized foodstore in Hoylake rather than West Kirby.

9.4.17 In addition to the above recommended strategy/vision for each town centre, the Council, in partnership with its stakeholders, should continue to promote the centres across Wirral (particularly through the internet (e.g. www.visitwirral.com)) as not just places to shop and eat/drink but also places to work, stay and live.

9.5 Recommendations on Town Centre Boundaries and Primary Shopping Areas

9.5.1 The NPPF (paragraph 85) identifies that LPA's planning policies should define the extent of town centres and primary shopping areas and set out the range of uses permitted in such locations as part of a positive strategy for the future of each centre.

9.5.2 The existing UDP Policies Map defines the town centre boundaries for each of the 5 town centres. As part of this Study, and in line with the brief, WYG has reviewed the existing town centre boundaries and makes recommendations on new primary shopping areas for each town centre. Our recommendations have regard to our vitality and viability health check, detailed analysis of each town centre, and town centre strategy recommendations identified above. It should be noted that in order to encourage a more positive and flexible approach to planning for the future of town centres the NPPF deleted its predecessors' requirement for LPA's to identify primary and secondary frontages.

9.5.3 In making our recommendations on the primary shopping area and town centre boundaries we have had regard to the definitions of each set out in Annex 2 of the NPPF:

> *"**Town Centre** – Area defined on the local authority's policies map, including the primary shopping area and areas predominantly occupied by main town centre sues within or adjacent to the primary shopping area…*
>
> ***Primary shopping area** – Defined area where retail development is concentrated."*

9.5.4 We set out our recommended town centre boundaries and primary shopping areas for each of the 5 town centres at **Appendix K**. In addition, in the health check assessments for the smaller district and local centres, some generally minor changes to centre boundaries are recommended.

In accordance with the NPPF that town centre boundaries should be kept under review, where necessary, so that future anticipated needs can be accommodated.