



Nathaniel Lichfield
& Partners
Planning. Design. Economics.

**Wirral Retail and Leisure Study
Update**

Wirral Council

March 2016

41303/03/PW/SMH/TS/AD

Nathaniel Lichfield & Partners
3rd Floor
One St James's Square
Manchester M2 6DN

nlplanning.com

This document is formatted for double sided printing.

© Nathaniel Lichfield & Partners Ltd 2016. Trading as Nathaniel Lichfield & Partners.

All Rights Reserved.

Registered Office:

14 Regent's Wharf

All Saints Street

London N1 9RL

All plans within this document produced by NLP are based upon Ordnance Survey mapping with the permission of Her Majesty's Stationery Office. © Crown Copyright reserved. Licence number AL50684A

Contents

1.0	Introduction	1
2.0	Retail Trends	3
	National Retail Trends.....	3
	Expenditure Growth	4
	New Forms of Retailing.....	4
	Retail Operators.....	5
3.0	Shopping Hierarchy and Retail Performance	7
	The Borough and Sub-Region.....	7
	Existing Evidence Base.....	10
	Shopping Centre Index	12
	New Research: Household Telephone Survey 2015	13
4.0	Household Shopping Patterns	15
	Change in Shopping Patterns: 2012 to 2015.....	21
5.0	Summary of Town Centre Health	25
	Analysis by Centre	25
	Birkenhead Health Check Summary	25
	Bromborough Village Health Check Summary	26
	Heswall Health Check Summary	26
	Hoylake Health Check Summary	27
	Liscard Health Check Summary.....	28
	Moreton Health Check Summary	28
	Prenton (Woodchurch Road) Health Check Summary	29
	West Kirby Health Check Summary	30
6.0	Assessment of Retail Needs	32
	Methodology	32
	Commitments.....	32
	Quantifying Capacity	34
	Sub-Regional Town Centre - Birkenhead	37
	Town Centres - Moreton	43
	Town Centres – West Kirby.....	45
	District Centres	47
	Borough-wide Capacity 2015 – 2030	52
7.0	Assessment of Commercial Leisure Provision	55
	Leisure Trends	55
	Commercial Leisure – Wirral	57
	Cinemas and Theatres.....	58

Health and Fitness Clubs	59
Family Entertainment Centres Including Ten-pin Bowling.....	59
Bingo/Casino.....	60
Indoor Play Centres	61
Other Commercial Leisure Provision	61
Summary of Household Survey (Leisure Results)	62
8.0 Conclusions	63
Shopping Patterns 2015.....	63
Retail Capacity Assessment.....	64
Meeting Shopping and Leisure Needs.....	65
Retail Assessment Summary	66

Appendices

- Appendix 1 Study Area
- Appendix 2 Household Survey Questionnaire / Survey Results
- Appendix 3 Economic Tables
- Appendix 4 CIneSCOPE Model – North West England

1.0 Introduction

1.1 Wirral Metropolitan Borough Council (the Council) commissioned Nathaniel Lichfield & Partners (NLP) in 2015 to prepare a Borough-wide Retail and Leisure Study Update. The study is required to assess the current convenience and comparison retail and leisure offer of the Borough and to quantify the need for new floorspace over the period to 2030; the period covered by the emerging Wirral Local Plan Core Strategy (the Core Strategy). This study is undertaken having regard to the requirements set out in the National Planning Policy Framework (NPPF) and the accompanying Planning Practice Guidance.

1.2 This new Study updates the evidence base, replacing the Wirral Borough Strategy for Town Centres, Retail and Commercial Leisure Study of 2009 (the 2009 study) and a 2012 Wirral Retail Study Update (the 2012 update)¹. This new study is informed by new empirical research (a new household survey) undertaken in June 2015.

1.3 Whilst the 2015 study represents a new chapter in the retail evidence base for Wirral, given that it is based upon new empirical research, and the methodologies adopted by NLP are not exactly the same as those adopted by consultants responsible for the authorship of the previous studies, the methodologies are sufficiently similar to allow for comparison of retail trends over time, drawing upon the conclusions of the three studies.

1.4 This new 2015 study is written to inform policy development and consideration of planning applications across Wirral Borough. The study:

- 1 assesses retail patterns and expenditure 'leakage' and quantifies the performance of centres/destinations;
- 2 assesses the future need and capacity for retail floorspace in the Borough over the period to 2030;
- 3 considers whether current retail provision is meeting the demands of Borough residents and whether there is a need to increase competition and/or influence the retail mix;
- 4 advises on where there is identified quantitative need for new convenience and comparison retail floorspace over the period to 2030;
- 5 advises on potential threats to the future retail health of the Borough and town centres;
- 6 provides a comparison with the findings of the 2009 study regarding performance of retail destinations across the borough, the need and capacity for new retail floorspace and quality of leisure provision;

¹ Paragraph 2.3 of the 2012 Study explains the methodology adopted in the 2012 Study and states that: 'The NEMS household survey (is)...re-run as part of the study update to remove 'Internet/Home Catalogue', 'Don't Know/Varies', 'Don't Do' and 'Don't Buy' responses...the market shares identified in the updated capacity exercise is increased from the existing baseline survey position reported in the 2009 study...(this) is counter-balanced by the significant increase in SFT (special forms of trading) deductions applied between this study update and the previous 2009 study'.

- 7 includes a desk-based analysis of existing commercial leisure provision and assesses potential future interventions where there is potential to improve provision in the Borough; and
- 8 assesses commercial leisure market share in Wirral and contrasts this with outflow to other administrative areas are diverting leisure spending away from Wirral.

2.0 **Retail Trends**

National Retail Trends

- 2.1 The economic downturn is still having a significant impact on the retail sector. A number of national operators have failed in recent years (e.g. Barratts, Blockbuster, Borders, Clinton Cards, Comet, Firetrap, Game, Habitat, HMV, JJB Sports, Jessops, La Senza, Land of Leather, MFI, Past Times, Peacocks and Woolworths), leaving major voids within centres and retail parks. Initially voids were concentrated in town centres, but more recent changes have left vacant floorspace in out of town shopping destinations in addition to those on the high street. That said, and despite well-documented concerns about a proliferation of non-retail uses, initiatives including the Government being more flexible on interchanging between main town centre uses, encouragement for temporary/'pop-up' businesses and the innovative use of space have in some centres have delivered positives out of the increasing number of voids.
- 2.2 Consolidation is also occurring. Argos, Morrisons and Tesco amongst others have in the past eighteen months announced the closure of shops in their portfolios and/or the disposal of assets; the Argos closures on a significant scale. Many town centre development schemes are delayed or abandoned. The demand from traditional retail warehouse operators is also reduced. B&Q is in the process of reducing the size of its 'Warehouse' format stores, with the surplus floorspace being promoted for occupation by foodstore operators including Morrisons and Sainsbury's.
- 2.3 Some of the main food store operators have seen a reduction in growth, with planned schemes delayed or abandoned. The principal large foodstore operators are developing fewer new stores, and those built-out tend to be of a smaller scale than the superstores that typified development programmes of the previous decade. However, Morrisons has recently taken the decision to sell off 150 of its M Local convenience stores. The Tesco announcement on store closures included sites across the country and abandonment of some store projects that were yet to open. Heightened popularity amongst consumers for the 'deep discounter' offer is resulting in the principal operators focussing attentions on competing in this budget sector. For example Sainsbury's and Netto began a joint venture at the end of 2014 to open a series of stores and launch again the Netto fascia in the UK.
- 2.4 Assessing future expenditure levels within this study needs to take into account the effects of the economic downturn and the slow rate of recovery, particularly in the short term. Careful consideration is needed to establish the appropriate level of expenditure growth to be adopted over the emerging Core Strategy plan period. This study takes a long term view for the plan period recognising the cyclical nature of expenditure growth. Trends in population growth, home shopping/internet sales and growth in turnover efficiency also need to be carefully considered and a balanced approach taken.

Expenditure Growth

- 2.5 Historic retail trends indicate that expenditure grows consistently in real terms, generally following a cyclical growth trend. The underlying trend shows consistent growth and this is expected to continue in the future. However, the recent economic downturn led to negative growth at its deepest point and a recent trend of limited growth is expected to continue in the short term ahead of upturn and recovery as part of the cyclical process.
- 2.6 In the past, expenditure growth fuelled growth in retail floorspace, including major out-of-centre development in the 1980s and 1990s. The economic downturn slowed growth considerably and a return to previous levels of growth is unlikely to be achieved, at least in the short term. However, the underlying trend over the medium and long term is expected to lead to a need for additional convenience and comparison retail floorspace. NLP anticipates these national trends will be mirrored in Wirral Borough.

New Forms of Retailing

- 2.7 New forms of retailing have emerged in recent years as an alternative to more traditional high-street shopping. Home/electronic shopping has expanded considerably with increasing growth in the use of personal computers/tablets/mobile phones and the internet. Smart phone technology, Apps, QR (Quick Response) codes, internet-connected glasses, multi-channelling and other technological advances are set to increase the proportion of shopping transactions undertaken remotely. Trends within this sector will have implications for retailing within Wirral Borough.
- 2.8 The growth in home computing, smart phone usage and interactive TV is likely to result in a continued growth in remote shopping and will have further effects on retailing in the high street. Food retailers are developing and operating so-called 'dark stores', from which goods are picked and delivered, but there is not any access to the public. Currently however, most online food shopping is 'picked' from existing foodstores open to the public. The challenge for foodstore operators is to make online food shopping profitable. The 'big 4' foodstore operators are attempting to entice customers to use 'click and collect' facilities because of this profitability issue. In the non-food sector, click and collect has been overwhelmingly popular particularly at John Lewis albeit there is now a £2 delivery charge for orders under £30.
- 2.9 Whilst online shopping has experienced rapid growth since the late 1990s, the latest available data suggests it remains a limited proportion of total retail expenditure; the proportion of convenience retail shopping on line is still limited, albeit e-shopping has gained a considerable stronghold in the comparison retail sector. Recent trends suggest continued strong growth in this market, albeit there is still uncertainty about its longer-term prospects and the potential effects on the high street. Experian Retail Planner Briefing Note 12.1 (October 2014) states:

'There were 52.7 million internet users in the UK (representing 84.1% of the population) in mid-year 2012 according to Internet World Stats. So growth of the internet user base will be less of a driver than in the past decade. But growth momentum will be sustained as new technology such as browsing and purchasing through mobile phones and the development of interactive TV shopping boost internet retailing. This study makes an allowance for future growth in e-tailing based on Experian projections'.

- 2.10 The implications on the demand for retail space are unclear. Some retailers and particularly foodstores fulfil online sales from their traditional retail premises. Growth in online sales may not always mean that there is a reduction in the need for retail floorspace. Furthermore, a current trend is for online retailers to open showroom stores, where they can showcase stock to customers; displays which typically rotate on a regular basis.
- 2.11 Given that internet shopping is likely to continue increasing in proportional terms, despite uncertainties over the nature and magnitude of growth, this assessment adopts relatively cautious growth projections for retail expenditure.

Retail Operators

- 2.12 In addition to new forms of retailing, operators have also responded to changing customer requirements e.g. extended opening hours and Sunday trading increasing significantly in the 1990s. Government proposals to hand Sunday trading laws to local Councils could provide the opportunity for less restriction on trading practices.
- 2.13 Retailers have responded to stricter planning controls by changing their trading formats. Some major food operators introduced smaller store formats capable of being accommodated within town centres, such as the Morrison's 'M Local', Tesco 'Express' and 'Metro', Sainsbury 'Local' and M&S 'Simply Food' and 'Foodhall' formats. If less than 280 sq. m gross, these convenience stores are afforded unrestricted trading hours. Food operators have also entered the local convenience store market, including Tesco 'Express' and M&S 'Simply Food'/'Foodhall' convenience stores linked to petrol filling stations. The expansion of discount food operators continues and at rapid pace, building upon sustained growth in last decade. These discount foodstores have smaller catchments than larger foodstores and in many towns; there are now multiple discount foodstores, sometimes within close proximity of each other. This trend is evident in Wirral Borough, with Aldi in particular and Lidl currently trading from a network of stores.
- 2.14 Foodstore operators have a rolling programme of store extensions and reinvigoration, particularly Asda, Sainsbury's and Tesco, that has replaced new build activity. Since 2012, Tesco in particular has concentrated on refreshing its existing stores, rather than pursuing new build.
- 2.15 In 2015 it is the so-called 'deep discount' retailers, principally Lidl and Aldi leading the way building new stores and extending existing premises. M&S 'Simply Food'/'Foodhall' has also seen considerable growth in 2015 which is

set to continue in to 2016 under the 'Foodhall' identity. Developments including both a discounter and an M&S 'Foodhall' store are becoming increasingly common. There is also a trend for more 'Little Waitrose' stores, particularly within larger town centres and at principal railway stations.

- 2.16 The main foodstore operators, faced with saturation in the grocery market, attempted to increase the sale of non-food products within their foodstores, including clothing and electrical goods. The recent recession halted this trend, is now reversing it and is part of the reason why consolidation and down-sizing are strategies being employed across these businesses.
- 2.17 Comparison retailers have also responded to recent market conditions. The bulky goods retail warehouse sector has rationalised and operators have scaled down store sizes, amidst a climate of mergers and failures. Other traditional high street retailers, including Boots, Poundstretcher and TK Maxx, have sought large out-of-centre stores. There is also a trend for clothing retailers to polarise to larger town centres, i.e. reduce the number of portfolio stores, but have a presence in the larger town centres. The charity shop sector has grown steadily over the past 20 years and there is no sign that this trend will halt. There is a proliferation of pawnbrokers and pay day loan shops on many high streets. The discount comparison retail sector has also grown significantly in recent years with major expansion from the likes of 99p Stores (now acquired by Poundland), B&M Bargains, Family Bargains, Home Bargains, Poundland, Poundstretcher and Quality Save. There is a trend for B&M Bargains to open on former B&Q/Homebase sites, and their current format is for larger stores with an attached garden centre.
- 2.18 The economic downturn has had, and is likely to continue to have, an impact on the retail sector; a sector that failed to protect itself properly against shifting economic conditions. Within town centres, many High Street multiple comparison retailers have changed their format. High Street national multiples have increasingly sought larger modern shop units (over 200 sq. m) with an increasing polarisation of activity into more dominant regional and sub-regional centres. The food operators have returned to town centres with their smaller format convenience stores, and the growth in the charity and discount sectors has led to a reoccupation of vacant floorspace. Short term, the pop-up shop and permissive temporary change of use has the potential to reduce vacancy rates and increase footfall. Longer term, retail to residential permitted development rights and a single town centre use class are initiatives which could bring about further change in the character of town centres. To adapt, town centres will need to meet the needs of their communities and may well include more of a leisure and residential presence than previously.

3.0 **Shopping Hierarchy and Retail Performance**

The Borough and Sub-Region

3.1 Wirral Borough is a peninsula that forms part of the Greater Merseyside area to the west of the River Mersey. The Borough borders to its south the north-western part of the administrative area of Cheshire West and Chester (the part of Cheshire West and Chester that is the former administrative area of Ellesmere Port and Neston). It is connected to Liverpool City Centre to its east via three tunnels, a railway tunnel that links Wirral to the Merseyrail (and wider national) rail network and two road tunnels; the Queensway tunnel providing a link from Birkenhead and the Kingsway tunnel providing a link from Wallasey.

Birkenhead

3.2 Birkenhead is the largest town in the Borough and defined by Policy CS25 in the emerging Core Strategy as a Sub-Regional Centre. The Core Strategy is at an advanced stage of preparation, with a final version scheduled to be published for public comment in late 2016. Policy CS25 clarifies that Birkenhead town centre includes Grange Road West, Oxton Road, Europa Boulevard, Argyle Street, Market Street and Hamilton Street.

3.3 Birkenhead is of a scale comparable to other nearby sub-regional shopping destinations (Bootle, Southport and St Helens), and it is an important shopping destination locally; particularly in the northern part of Wirral Borough from which Chester and the designer outlet shopping village at Cheshire Oaks are less readily accessible than from the south of the Borough, and despite the proximity and accessibility of Liverpool.

3.4 Birkenhead provides a wide range of shopping, service, leisure, business and public administration facilities that meet the needs of Wirral residents. The Croft Retail and Leisure Park is located to the south of Birkenhead and the 2015 household survey results show that this now attracts a similar quantum of comparison retail expenditure to Birkenhead. Additionally, a significant proportion of a higher-order comparison retail shopping is directed to destinations outside of the Borough; this is explored in further detail below.

3.5 The mainstay of Birkenhead town centre is its covered shopping malls, comprising the Grange (a high vacancy rate recorded by the 2012 update), and the Pyramids. Both are now in single ownership and branded jointly as the Pyramids. The pedestrianised Grange Road incorporates the new town centre Asda store.

3.6 The health check of the town centre that formed part of the 2009 study found Birkenhead to have low Zone A rents when compared with other strategic centres in the North West region. The study noted a reduction in footfall across the town centre in the five years to 2009 and a predominance of fashion multiples operating towards the lower end of the retail market. The high

vacancy rate was considered to be exacerbated by the significant proportion of units in the Grange shopping centre that are vacant. Beatties (House of Fraser) was identified as the only department store in the centre and the study identified a very limited leisure offer coupled with a low quality physical environment on the approaches to and within the town centre.

- 3.7 The Integrated Regeneration Study for Birkenhead and Wirral Waters (IRS, June 2010) recognised the accommodation requirements of multiple retailers not being met and a need to revitalise and diversify the town centre offer through the provision of modern retail floorplates. It noted that if it was not possible for retailer requirements to be accommodated within the town centre (either in existing units or in units created following redevelopment) then it is reasonable for edge-of-centre and out-of-centre locations to be considered.
- 3.8 In January 2014 NLP provided separate advice to the Council on appropriate local thresholds for undertaking retail impact assessments, to inform amendments to emerging Core Strategy Policy CS28 (“2014 NLP Thresholds advice”). In the case of Birkenhead, it was recommended that the National Planning Policy Framework threshold of 2,500 sq. m gross for all retail development is adopted in order to support the IRS and to ensure that Birkenhead town centre retains its status as a Sub-Regional Centre in the face of competition from Liverpool One and potential future competition from the 60,000 sq. m gross of retail floorspace proposed at East Float (Wirral Waters).
- 3.9 A full summary of Birkenhead’s health as recorded by Wirral Council, following surveys undertaken in summer 2015, is set out at **Section 5.0**.

Town and District Centres

- 3.10 Policy CS25 of the emerging Core Strategy also defines :
- Heswall, Liscard, Moreton and West Kirby as Town Centres; and
 - Bromborough Village, Hoylake and Woodchurch Road, Prenton as District Centres.
- 3.11 Heswall town centre is located in the south-west of Wirral on the west side of the peninsula. Further north-west on this western side of the Peninsula is West Kirby town centre; to the north of this is Hoylake district centre. East of Hoylake and in the central north part of the Borough is Moreton town centre and further east still to the north of Birkenhead is Liscard town centre. South-west of Birkenhead town centre is Woodchurch Road (Prenton) district centre and south east of this on the eastern side of the peninsula is Bromborough Village centre.
- 3.12 The town centres are of varying scale and character but generally have a range of independent retailers alongside businesses meeting every day shopping needs and providing access to some services.

Heswall – *The 2009 study identified Heswall a healthy town centre with a good mix of convenience and comparison retail stores, including a strong independent sector, and a good range of eating and drinking places. Marks*

and Spencer operates a Simply Food store in Heswall, and there is every evidence that the vital and viable centre observed in the 2009 study is still thriving. The 2009 study reported a low vacancy rate, improving yields and interest from high quality retailers Country Casuals and Fat Face. Country Casuals has since moved in to premises on Telegraph Road.

Heswall is identified as being in good health and a site visit by NLP confirmed that little has changed since the Wirral Town Centre Study (WTCS) was undertaken in 2011.

Liscard – *The Cherry Tree Centre in Liscard has strong representation of national multiples (including B&M Bargains and Wilkinson) and others including Boots and Poundland are located on Liscard Way; the 2009 study concluded that that the centre is firmly at the lower end of the retail spectrum. Asda operates a superstore at Sea View Road and Tesco operates an Express store in Liscard Village. The 2009 study identified the vacancy rate to be above the UK average and that retail rents had generally remained static. Long standing aspirations to extend the Cherry Tree centre are yet to come to fruition and it is the opportunity for development/redevelopment of the centre that presents the most realistic prospect of town centre improvements. In terms of vitality and viability, there is evidence that Liscard is in declining health; indicators include a high vacancy rate and predominance of low-value and service uses and poor environmental quality.*

Moreton – *The 2009 study identified Moreton as a busy, stable centre which was observed to be generally clean and tidy and having a low vacancy rate. Little had changed since 2009. The town still does not possess a major supermarket, albeit there are an Aldi (outside the centre), Co-op, Iceland and Tesco Express supermarkets on Hoylake Road. The comparison retail offer is also limited, but there is a strong service sector with a good representation of food and drink outlets.*

West Kirby – *West Kirby is anchored by a Morrisons foodstore, and other national multiples include Boots and M&Co. The centre also has a strong independent retail sector and food and drink businesses that appear to fair well, as part of a vital and viable centre. The 2009 study identified West Kirby as attractive, vibrant and stable with a healthy convenience retail offer and a good range of specialist shops and independent retailers. A very low vacancy rate, high level of footfall and low incidence of crime recorded in 2009 and anti-social behaviour all point to a successful town centre. Little has changed over the period since 2009 with the exception of the opening of Aldi on Bridge Road in 2012, and the centre continues to thrive and is evidently successful in meeting local shopping and leisure needs.*

3.13

The 2014 NLP Thresholds advice recommended that the following floorspace thresholds for retail impact assessments are adopted in respect of retail development with catchment areas extending to town and district centres:

- Heswall, Liscard, Moreton and West Kirby, Bromborough Village and Woodchurch Road, Prenton – 1,000 sq. m gross; and

- Hoylake – 500 sq. m gross.

3.14 A full summary of town centre and district centre health as recorded by Wirral Council, following surveys undertaken in summer 2015, is set out at **Section 5.0**.

Distribution of Retail Centres

3.15 **Appendix 1** illustrates the distribution of Town Centres and District Centres across the Borough, in context with Birkenhead Sub-Regional Centre. The eight principal centres are dispersed across the Borough in a pattern that is generally commensurate with population concentration. The only exception to this pattern of spatial distribution is a triangular shaped area between Woodchurch Road in the north, Heswall in the south-west and Bromborough Village in the south-east. There is a significant populated area between Higher Bebington and Bromborough from which residents have further to travel to reach a defined centre than is the case from other parts of the Borough.

3.16 The emerging Core Strategy provides greater distinction regarding the scale and role of centres, than that afforded by Policies SH1 and SH2 in the Wirral Unitary Development Plan (UDP) of 2000. The Core Strategy hierarchy in draft Policy CS25 is based on a review carried out as part of the 2009 study in light of changes in Government Planning Guidance in the period of time since adoption of the UDP. In addition to the Sub-regional, Town and District Centres discussed in this section, draft Core Strategy Policy CS25 also lists 16 Local Centres. The local centres are geared towards providing a primarily top-up shopping role alongside a food and beverage offer spanning Classes A3 to A5 of the Use Classes Order. Eastham, Greasby and Oxtton Village were added as local centres in response to public consultation on the Core Strategy.

3.17 For the avoidance of doubt, this study utilises the hierarchy of centres in the emerging Core Strategy draft Policy CS25.

Existing Evidence Base

Understanding of Town Centres, Retail and Leisure in Wirral

3.18 The 2009 Study identified that Town, District and Local Centres are well provided for in terms of convenience retail floorspace. The 2012 update to the quantitative assessment in the 2009 study concluded that there is no quantitative need for the Council to plan for new convenience retail floorspace across the Borough over the Local Plan period to 2030. This conclusion appeared consistent with the extent of existing provision and the fact that three large format foodstores had opened in and near to Wirral (Sainsbury's Neston and Morrisons New Brighton in addition to Asda Birkenhead) since 2009. It should be noted however, that a household survey was not undertaken as part

of the 2012 update, and therefore the conclusions of the 2012 update should be considered in this context².

- 3.19 The 2012 update identified a number of foodstores to be trading at above expected levels, but concluded that this would most likely be addressed by commitments coming forward including the new convenience retail provision at Wirral Waters. The accuracy of the perceived performance levels in the 2012 update could not be completely verified as there was no household survey undertaken.
- 3.20 The 2012 update concluded that there was not any realistic scope to enhance overall convenience market share in the Borough, beyond current retention levels. The quantitative assessment identifies that existing convenience floorspace within the Borough retains 95.4% of residents' convenience retail expenditure.
- 3.21 The 2012 update records Town, District and Local centres in Wirral as retaining 43.5% (£340.0m) of comparison retail expenditure generated by Borough residents. Of this, nearly two-thirds (£217.8m) was directed to Birkenhead. Out-of-centre retail parks were shown to claim a further £198.0m, whereas foodstores were recorded as attracting only a 2% market share or £15.5m. An overall retention rate of 70.8% demonstrated a strong position for the Borough, albeit there the 2012 update identified significant leakage to Chester city centre and its retail parks (£41.2m) and Liverpool (£111.4m).
- 3.22 Limited quantitative comparison retail capacity was identified over the period to 2018, with more substantial capacity over the periods to 2021 and 2030:
- Birkenhead – 4,400 sq. m net at 2021 rising to 9,600 sq. m net by 2030; and
 - Wirral Borough – 9,000 sq. m net at 2021 rising to 23,300 sq. m net by 2030.
- 3.23 The 2012 update concluded that commitments would absorb capacity over the short to medium term and only in the longer term (over the period to 2030) was a need to plan for additional comparison retail floorspace considered necessary.
- 3.24 The overall conclusion of the 2012 update was one of little need to plan for additional convenience or comparison retail floorspace over the Local Plan period, at least in the short to medium term.
- 3.25 In the leisure sector, the 2009 study identified some capacity to improve the food and drink offer, suggesting a requirement to promote new good-quality

² Paragraph 2.3 of the 2012 Study explains the methodology adopted in the 2012 Study and states that: 'The NEMS household survey (is)...re-run as part of the study update to remove 'Internet/Home Catalogue', 'Don't Know/Varies', 'Don't Do' and 'Don't Buy' responses...the market shares identified in the updated capacity exercise is increased from the existing baseline survey position reported in the 2009 study...(this) is counter-balanced by the significant increase in SFT (special forms of trading) deductions applied between this study update and the previous 2009 study'.

restaurants. In broad terms, it concluded that there might be sufficient capacity to support some 20 new food and drink outlets across Wirral over the period to 2021. The study considered that the Neptune scheme in New Brighton was sufficient to meet the capacity identified for additional cinema provision, necessary to meet the needs of Wirral residents.

Shopping Centre Index

- 3.26 VENUESCORE™ is a Shopping Centre Index which ranks approximately 3,000 UK retail venues; including town centres, stand-alone malls, retail warehouse parks and factory outlet centres.
- 3.27 The retail offer of each venue is assessed using a scoring system which takes account of multiple retailers, each of which is weighted to reflect its overall impact on shopping patterns.
- 3.28 Venuescore is broadly comparable to the MHE Shopping Index and therefore provides a useful and more up-to-date alternative (MHE has not updated its shopping index since 2008). The rank for town centres in Wirral Borough and competing centres in other administrative areas for the year 2013 is shown in Table 3.1 below:

Table 3.1 Shopping Centre Index by Venuescore

Centre	Venuescore	Rank (2013)	Rank (2010)	Change	Location Grade
Liverpool	513	5	4	-1	Major City
Chester	277	35	32	-3	Major Regional
Cheshire Oaks	157	126	150	24	Regional
Birkenhead	152	134	112	-22	Regional
Ellesmere Port	68	374	362	-12	Major District
Liscard (Wallasey)	62	412	459	47	Major District
Croft Retail Park	48	557	533	-24	District
Heswall	35	752	590	-162	District
Moreton	24	1,108	1,128	20	Minor District
West Kirby	19	1,383	1,348	-35	Local
Neston	18	1,452	2,111	659	Local
Woodchurch Road, Prenton	16	1,605	1,496	-109	Local
Bromborough	11	2,216	2,683	467	Local
Hoylake	10	2,428	2,196	-232	Local

- 3.29 Venuescore ranked Birkenhead as the main centre in Wirral Borough and 134th of all centres in the UK. Birkenhead was below Liverpool, Chester and Cheshire Oaks, but above Ellesmere Port.
- 3.30 Similarly to the results of the MHE (2003/04-2008), Birkenhead fell in the rankings over the period from 2010 to 2013. This suggests that there may have been a continual decline in Birkenhead over this period. A limitation of

Venuescore is that it excludes consideration of the centre's independent offer, thus not recognising the contribution to the economy and to local distinctiveness made by this sector, which is in some centres highly significant.

- 3.31 As stated above there is an increasing tendency for shoppers to look towards out-of-centre shopping destinations in the Borough for comparison retail purchases and this is evidenced by the fact that the Croft Retail Park is ranked as the third centre in Wirral Borough and that Cheshire Oaks ranks above Birkenhead in 2013, whilst it was ranked below it in 2010.
- 3.32 Heswall is identified as a district centre, is ranked 752nd nationally and is the only other centre in Wirral to rank in the top 1,000 destinations. Notwithstanding this Heswall's rank has dropped quite dramatically since 2010.
- 3.33 Overall, Venuescore broadly reflects the hierarchy of the centres in Wirral Borough and the relative importance of Birkenhead as the principal town centre in the Borough.

New Research: Household Telephone Survey 2015

- 3.34 In June 2015 NEMS Market Research conducted a household survey, consisting of 1,100 telephone interviews across the 11 sub-zones. The plan at **Appendix 1** illustrates the study area and the 11 sub-zones and identifies these in context with Birkenhead town centre and the defined town and district shopping centres in the Borough. Table 3.2 details the postcode sectors in each sub-zone.

Table 3.2 Study Area Survey Zones

Survey Zone	Postcode Sector(s)
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

- 3.35 The study area and sub-zones used in this 2015 study are consistent with those used in the 2009 study and its 2012 update.
- 3.36 The new household survey questionnaire is similar to the household survey questionnaire used with the survey that informs the 2009 study. There is scope for an assessment of any material changes in shopping patterns and a comparison is provided later in this report. **Appendix 2** includes the

questionnaire and raw results of the household surveys from NEMS Market Research. Separate tables presenting weighted results (where the final tabulated data is adjusted to make the results representative of the population within each zone) and un-weighted results are included. The economic tables in **Appendix 3** are based on the un-weighted NEMS household survey results because weighting is applied when population and expenditure is taken into account and using the weighted household survey results would have led to the results being weighted twice. Commentary on shopping patterns is provided in Section 4.0 and the results inform the capacity assessments at Section 6.0. The leisure results summarised in Table 7.1 and referenced in the preceding commentary in Section 7.0 are taken direct from the NEMS survey findings and thus the weighted survey results are utilised to ensure that these are properly representative of the population in each survey zone.

4.0 **Household Shopping Patterns**

- 4.1 Typical convenience shopping patterns show that shoppers utilise a number of destinations for such purposes. The household survey reflects this by asking residents their primary main food and primary top-up convenience retail shopping destinations.
- 4.2 The NLP analysis of the household survey assumes that 70% of available consumer expenditure is directed to main food shopping and 30% is directed towards top-up shopping. This split is informed by Experian demographic information and local retail characteristics.
- 4.3 There is not a set formula for splitting convenience retail expenditure by main and top-up food shopping but the NLP approach is robust and reflective of standard practice in the completion of retail and town centre studies.
- 4.4 The analysis of the household telephone surveys excludes 'internet'/mail-order responses and 'don't know'/don't buy' answers. NLP adjusts the Experian MMG3-derived per-capita convenience goods expenditure to exclude that proportion of convenience retail expenditure that is attributable to non-store source, but include an allowance for internet spending on food goods that is attributable to trading stores; this is done on a pro-rata basis.
- 4.5 The comparison retail spending power of the study area is split amongst six categories of goods. The division of comparison retail goods spending power is:
- Clothing and Footwear – 25%
 - Electrical Appliances – 16%
 - Furniture – 12%
 - DIY – 11%
 - Health and Beauty – 11%; and
 - Recreation (Books, CDs and Toys) – 25%
- 4.6 The respective weighting afforded to primary/secondary destinations cited is 70% and 30% respectively. The household survey includes secondary destination questions ('Where else might you go?') for all comparison retail goods sectors.
- 4.7 In common with the convenience retail goods assessment, there is not a set formula for splitting expenditure amongst different categories of comparison retail goods. NLP considers that its approach is robust and consistent with standard practice, as the proportion of expenditure directed to different categories of goods is informed by Experian demographic information.
- 4.8 The analysis below is based upon interviewees' responses to detailed questioning about: main food and top up food shopping; and comparison shopping across the six categories of comparison retail goods.

- 4.9 The economic tables at **Appendix 3** combine the main-food and top-up shopping patterns, to arrive at overall convenience shopping patterns in the study area. The same approach is adopted for the comparison retail sector, where shopping patterns across the six categories of goods are combined to provide an overall picture of comparison shopping patterns.

Borough Shopping Patterns

- 4.10 The study area is adopted for the purposes of assessing retail shopping patterns across Wirral Borough. As with the 2009 household survey, a very small proportion of the Borough adjacent to zones 5a and 5b and zone 6 falls outside of the study area as the postcode boundaries do not precisely match the Borough boundary in this location; however there are few residents in this rural part of the Borough on the boundary with Cheshire West and Chester. NLP does not consider that the exclusion of these areas when referring to Borough-wide shopping patterns has any material implications.

Convenience Retail Shopping Patterns

- 4.11 Table 4.1 sets out market shares in the convenience retail sector at June 2015. Full results are given in the economic tables at **Appendix 3**. Table 4 details main-food shopping patterns recorded, Table 5 top-up shopping patterns and Table 6 the combined results. It should be noted that the list of stores in Table 4.1 only includes those which generated a statistically significant response and therefore this list isn't intended to be a comprehensive list of all the foodstores in Wirral.

Table 4.1 Convenience Retail Market Share in Wirral Borough (2015)

Centre	Market Share (%)
Birkenhead Sub Regional Town Centre	7.53
Heswall Town Centre	8.72
Liscard Town Centre	9.55
Moreton Town Centre	1.97
West Kirby Town Centre	7.77
Bromborough Village District Centre	1.37
Hoylake District Centre	0.69
Woodchurch Road, Prenton District Centre	8.19
Local Centres Combined	11.55
Sub Total	57.32
Other Destinations	Market Share (%)
Aldi, New Ferry	4.18
Aldi, Moreton	2.86
Asda, Birkenhead	2.40
Asda, Croft Retail and Leisure Park	6.49
Asda, Arrowe Park	5.11
Morrisons, New Brighton	3.07
Sainsbury's, Upton	5.48
Tesco Extra, Bidston	5.15
Other Destinations in Wirral Borough	6.15
Wirral Borough Total	98.20
Leakage	1.80

Source: NEMS Household Survey June 2015

- 4.12 The 98.2% retention rate in the convenience retail sector is exceptionally strong and significantly higher than the norm; the norm being where travel to work patterns and geographical proximity to stores in neighbouring administrative areas will typically see up to 25% of convenience retail expenditure (and more in urban conurbations) directed to destinations beyond the administrative area.
- 4.13 The 98.2% retention rate is an increase on the already high retention rate of 95.4% recorded in the 2012 update, and based upon a 2009 survey of shopping patterns.
- 4.14 Whilst the high retention rate of convenience retail expenditure is reflective of Wirral being a peninsula, proximity to Liverpool and cross-Mersey travel-to-work patterns might be expected to generate a higher proportion of expenditure out-flow. It is worth stating that there are no large format foodstores/superstores between Liverpool city centre and the administrative boundaries of Wirral and therefore commuters are still likely to undertake their main convenience shopping in Wirral. This may in part explain the high retention of convenience retail expenditure in Wirral.
- 4.15 The lack of out-flow to destinations beyond the Wirral administrative area suggests that there is a tendency for convenience retail shopping to be undertaken at destinations local to home.

4.16

The household survey results demonstrate that all of the higher-order defined centres together with out-of-centre stores (with the exception of Bromborough District Centre – which is listed separately to the Croft Retail Park) and Hoylake are meeting local shopping needs. This is borne-out in by the results detailed in Table 6 (**Appendix 3**), which show that the predominant destination(s) varies across different parts of the Borough with limited flow of expenditure between areas:

- The greatest proportion of Zone (1) – the north-western areas of Hoylake and West Kirby – residents' convenience retail shopping expenditure is directed to Morrisons at West Kirby (32.98%);
- Residents of Zones (2a) and (2b) – the central north areas of Moreton Woodchurch, Upton and Greasby – shop in greatest numbers at the out-of-centre Aldi, Moreton (over 20% from the Moreton area) and Sainsbury's, Upton (over 22% from the Woodchurch, Upton and Greasby area);
- Zones (3a) and (3b) - the Liscard and New Brighton area in Wallasey – direct nearly 40% of convenience retail spend to the Liscard Asda;
- Across the Birkenhead Zones (4a), (4b) and (4c), nearly 15% of convenience retail expenditure is directed to the Birkenhead town centre Asda, and whilst this attracts the greatest proportion of spend from the Birkenhead North area, the Aldi and Sainsbury's stores at Woodchurch Road attract over a third of convenience retail expenditure from Birkenhead South and Birkenhead West; and
- Across Zones (5a) Bromborough, (5b) Bebington and (6) Heswall in the southern swathe of the Borough, four stores are strong – two Aldi stores at Heswall and New Ferry, Asda at the Croft Retail and Leisure Park and Tesco at Heswall. Stores in Heswall town centre (including the Aldi and Tesco) attract almost 80% of convenience retail spending from the Heswall area.

4.17

The proportion of convenience retail expenditure retained across the eleven sub-zones that make up the study area covering Wirral Borough is consistently high, indicating its residents are well provided for in the food retail sector.

Comparison Retail Shopping Patterns

4.18

Table 4.2 details market shares in the comparison retail sector at June 2015. Table 13 of **Appendix 3** provides further details in regards to non-food retail shopping patterns in Wirral.

Table 4.2 Comparison Retail Market Share in Wirral Borough (2015)

Centre	Market Share (%)
Birkenhead Sub Regional Town Centre	16.66
Heswall Town Centre	2.17
Liscard Town Centre	2.46
Moreton Town Centre	1.24
West Kirby Town Centre	1.86
Bromborough Village District Centre	3.93
Hoylake District Centre	0.46
Woodchurch Road, Prenton District Centre	0.59
Local Centres Combined	6.28
Sub Total	35.66
Other Destinations	Market Share (%)
Croft Retail and Leisure Park	16.93
Bidston (Hoylake Road)	1.66
Junction One Retail, Bidston Moss	0.96
B&Q, Bidston Link Road, Wallasey	4.28
Homebase, Upton Bypass, Upton, Wirral	1.40
Other Destinations in Wirral Borough	7.39
Wirral Borough Total	68.28
Cheshire Oaks	4.06
Chester	4.74
Liverpool	18.11
Other Outside Borough	4.82
Leakage	31.72

Source: NEMS Household Survey June 2015

- 4.19 Over two thirds (68.28%) of the comparison retail expenditure generated by residents of Wirral Borough is retained within it, but Birkenhead and the defined Town and District centres attract little more than half of this (35.66%). Birkenhead town centre attracts the greatest market share of any centre (16.66%) but this is exceeded by the Croft Retail and Leisure Park, which attracts a slightly greater market share (16.93%).
- 4.20 The retention rate of the Borough in the comparison retail sector shows a reduction, when the findings of the 2015 study (68.28%) are compared with the 2012 update (based upon a 2009 survey of shopping patterns) which recorded a 70.8% market share. The market share of Birkenhead has reduced considerably from nearly 28% to less than 17% and the combined market share of centres in the Borough has fallen from in excess of 43% to under 36%. The market share of out-of-centre destinations in the Borough has increased from about a quarter of all comparison retail expenditure to in excess of 32%.
- 4.21 Further analysis shows that Birkenhead attracts 45% of comparison retail expenditure generated in Zone 4a: Birkenhead North. Birkenhead also has a high market share within Zone 4b: Birkenhead South (34%) and Zone 4c: Birkenhead West (23%). Hoylake and West Kirkby on a combined basis attract 18% of comparison retail expenditure generated in Zone 1: Hoylake and West

Kirby. Liscard has a market share of 16% in Zone 3a: Liscard South and a rather low market share of 9% in Zone 3b: New Brighton and Liscard North. Aside from this, Heswall has a market share of 15% in Zone 6: Heswall and Moreton attracts just 11% of comparison retail expenditure generated in Zone 2: Moreton.

4.22 The Croft Retail and Leisure Park is dominant in Zone 5a: Bromborough and Zone 5b: Bebington; its market share exceeding 30% in each. Other notable statistics in the comparison retail sector are outflows of expenditure to Chester (14% from Zone 6: Heswall) and to Liverpool (28% of comparison retail expenditure generated in each of Zone 1: Hoylake and West Kirby and Zone 3b: New Brighton and Liscard North).

4.23 However, it should be noted that the Rock Retail Park to the south of Birkenhead does not justify being listed as a separate destination due to its low market share, thus it has been included in 'other destinations in Wirral Borough'. Also of relevance is that the expenditure related to Bidston (Hoylake Road) may be over-inflated and some of this expenditure in reality should be attributed to the Tesco Extra store at Bidston or Junction One Retail Park, Bidston Moss. Furthermore, B&Q, Wallasey is on the same site as Junction One Retail Park, Bidston Moss, meaning that the expenditure attributed to each may not reflect the actual position.

4.24 Bromborough Village District Centre is recorded as having the next greatest market share amongst the defined centres. Despite NEMS market research going through a process of querying whether respondents stating 'Bromborough' as a destination meant Bromborough centre or the Croft Retail and Leisure Park (and undoubtedly this avoided any significant misunderstanding amongst interviewees) the market share attributed to Bromborough Village is not consistent with the comparison offer in the centre and has almost certainly been over-inflated by expenditure which should be attributed to the Croft Retail and Leisure Park. As such it is likely that the market share of the Croft Retail and Leisure Park is greater than that recorded (the same issue arose with the household survey that informed the 2009 study).

4.25 Liscard town centre attracts a 2.46% market share and the 16 local centres a combined market share that exceeds 6% of Borough comparison retail goods spending.

4.26 Moreton, West Kirby, Hoylake and Woodchurch Road, Prenton all have a less than 2% market share of Borough comparison retail goods spending.

4.27 Liverpool is the principal destination for Wirral residents' comparison retail spending outside of the Borough (18.11%). Chester attracts a more modest share (4.74%) and Cheshire Oaks (4.06%) less still, but a materially significant proportion of comparison retail expenditure generated in the Borough.

4.28 The proximity of Liverpool city centre to Birkenhead, and Chester and Cheshire Oaks to the southern boundary of Wirral Borough, and the offer carried by

these destinations is the most likely reason why a significant proportion of comparison retail expenditure is leaked from the Borough.

- 4.29 The 2012 update (based upon a 2009 survey of shopping patterns) recorded the market share of Chester and its retail parks as 5.27% and it is likely that the 4.74% recorded for 'Chester' in the 2015 study does not represent any reduction in outflow of expenditure from Wirral to Chester, given that the most recently recorded market share relates to Chester City Centre only.
- 4.30 The attraction of Liverpool city centre to residents of Wirral Borough for comparison retail shopping is shown to have increased from 14.2% as recorded by the 2012 update (based upon a 2009 household survey) to 18.11%. Whilst this is clearly reflective of the increased offer in Liverpool following the opening of Liverpool One, the increase in market share over the six year period to 2015 is less pronounced than the growth in performance at out-of-centre retail destinations within Wirral.
- 4.31 It also is important to note that whilst there is a significant leakage of expenditure to destinations outside of the Borough, and this is potentially having an impact on the vitality and viability of centres within the Borough (particularly Birkenhead and Liscard), the outflows of expenditure are not necessarily demonstrative of unsustainable patterns of shopping in the case of Liverpool and Chester, because of their good accessibility by public transport.
- 4.32 The greatest retention of comparison retail expenditure is in the Birkenhead, Moreton, Woodchurch, Upton and Greasby areas (approximately three-quarters in each sub-area). The lowest proportion of comparison retail expenditure retained by the Borough is from the Hoylake and West Kirby (58.53%) and Heswall (59.06%) areas.

Change in Shopping Patterns: 2012 to 2015³

Drawing Comparisons between different Research

- 4.33 Caution needs to be exercised in drawing comparisons between the findings of the 2009 empirical research, the 2012 refresh and this 2015 update, given that there is always a margin of error in the undertaking of household shopper surveys and subtle methodological differences in the design and interpretation of household surveys. Conclusions over broad patterns can be drawn, including which centres are shown to be stronger or weaker in the convenience and comparison retail sectors now when compared with seven years ago.

Borough-wide Shopping Patterns

Convenience

- 4.34 The current retention rate of convenience retail expenditure generated in the Borough (over 98%) is very strong and is demonstrative of strong

³ 2012 market share based upon reworked 2009 household survey

representation from most of the leading national supermarket chains. The 2009 household survey recorded a retention rate of 95.4%, which suggests that the attraction of convenience retail destinations in Wirral relative to destinations outside of the Borough boundary has increased.

- 4.35 The market share of Birkenhead town centre has increased from below 6% to above 7.5%; reflective of Asda having opened at Grange Road. Of the other defined town centres, only Heswall is recorded as having increased its market share in the convenience retail sector (marginally from 8.6% to 8.7%). The convenience retail market share of Liscard is shown as recorded as having reduced from nearly 13% to approximately 9.5% (reflective of the lesser market share recorded for the Seaview Road Asda); the market share of Moreton has reduced from over 3% to below 2%; and the market share of West Kirby has reduced from nearly 6% to 4.3%.
- 4.36 Large format (and generally free-standing) foodstores continue to dominate, albeit borough-wide market share amongst the traditional 'big 4' (Asda, Morrisons, Sainsbury's and Tesco) has fallen in the main, with the so-called 'deep discount' retailers (Aldi and Lidl) increasing their standing.
- 4.37 Table 4.3 illustrates that the recorded market share of the traditional 'Big 4' has fallen considerably from over two-thirds at 2012⁴ to some 57% in 2015. This down-turn is also in the context of Asda, as noted above, having opened a new store in Birkenhead and Morrisons opening at New Brighton during the period between the two sets of empirical research.
- 4.38 It is more difficult to quantify the upturn in the fortunes of the so-called 'deep discount' retailers as a number of the stores picked up in the 2015 research do not feature as individual listings in the 2012 economic tables. Aldi in Moreton opened in July 2011 and Aldi West Kirby in May 2012 and consequently both stores were not trading at the time of the 2012 study. That said, it is clear that the 26.1% market share recorded at 2015 for this sector of the convenience retail market is significantly above the <10% recorded in 2012.

⁴ 2012 market share based upon reworked 2009 household survey

Table 4.3 Borough-Wide Market Share of Principal Foodstores in Wirral

'Big 4'		
Store	% Market Share 2012	% Market Share 2015
Asda, Arrowe Park	7.8	5.1
Asda, Croft Retail and Leisure Park	11.4	6.5
Asda, Grange Road, Birkenhead	-	6.0
Asda, Liscard	11.9	8.2
Asda, Stanley Road	-	2.4
Morrisons, New Brighton	-	3.0
Morrisons, West Kirby	5.4	3.9
Sainsbury's, Upton	8.4	5.5
Sainsbury's, Woodchurch Road, Prenton	4.8	4.3
Tesco Extra, Bidston	8.9	5.2
Tesco, Heswall	6.1	5.1
Tesco Metro, Rock Ferry	2.9	1.6
Sub Total	67.6	56.8
Discounters		
Aldi, Laird Street, Birkenhead	1.9	3.3
Aldi, Heswall	1.3	2.3
Aldi, Moreton	NLI ⁵	2.9
Aldi, New Ferry	1.3	4.2
Aldi, Prenton	0.6	3.5
Aldi, West Kirby	NLI ⁵	3.4
Lidl, Tranmere Urban Village	0.5	0.9
Lidl, Wallasey	0.8	2.1
Sub Total	-	26.1

Comparison

- 4.39 The greater than two-thirds retention of comparison retail expenditure within the Borough, as recorded by this study, is healthy, but also represents a reduction when compared with the 70%+ market share recorded by the 2009 household survey. The 2012 update recorded town, district and local centres as attracting 43.5% of comparison retail expenditure generated in the Borough. The equivalent market share recorded by the 2015 empirical research is 35.7%. The market share of out-of-centre destinations has increased from 27.3% to 32.6% with over half of this directed to stores at the Croft Retail and Leisure Park.
- 4.40 The new empirical research suggests that the market share of Birkenhead town centre has reduced from around 25% to below 17%. There is a mixed picture in the smaller defined town centres of the Borough. The market share in West Kirby has remained broadly the same, at about 1.9%. Moreton and

⁵ NLI – Not listed individually in 2012 Update Study

Heswall are recorded as having increased marginally their comparison retail market shares (from 1.1% to 1.2% and from 1.8% to 2.2% respectively). The market share of Liscard is shown to have declined dramatically from 5.6% to 2.5%.

4.41 Whilst some caution needs to be exercised in drawing direct comparisons between the two datasets, the broad indication is that enhanced comparison retail offers at destinations outside of the Borough is increasing the out-flow of expenditure. Within the Borough, the market shares of out-of-centre destinations and particularly the Croft Retail and Leisure Park are increasing. The increased leakage of expenditure to destinations outside of the Borough and the increased attraction of out-of-centre stores appear to be primarily at the expense of Birkenhead and Liscard.

4.42 The reinvigoration of town centre floorspace in Birkenhead to provide commercial floorspace in the configuration required by retail and leisure operators will be a pre-requisite to reversing the apparent decline of the principal shopping centre in Wirral, and an increasing outflow of comparison retail expenditure to destinations outside of the Borough. Local shoppers will only be attracted back to town centre destinations if their overall attraction is perceived as on a par with or better than other options available within the Borough and the wider sub-region.

4.43 The overall picture is that growth in retention of convenience retail expenditure in the Borough has to be set against downturn in the comparison goods market and the particularly noticeable decline in the recorded market share of Birkenhead and Liscard. Whilst, again, this must be treated with a degree of caution, it does suggest that a greater proportion of Wirral Borough residents are choosing to shop at destinations other than the traditional defined centres.

5.0 **Summary of Town Centre Health**

5.1 Wirral Council undertook an audit of facilities of the defined centres within the Borough in July 2015 and has produced a suite of health check reports. A summary of these health check assessments is set out below. The analysis by NLP excludes uses recorded as 'Miscellaneous', as this allows for a direct comparison with national averages as published by Experian Goad.

Analysis by Centre

Birkenhead Health Check Summary

5.2 The Birkenhead Town Centre health check assessment is based on the Core Shopping Area and includes the Pyramids shopping centre, Grange Road, Europa Square, Claughton Road, Whetstone Lane and the Primarily Commercial Area on the north side of Claughton Road.

5.3 The assessment finds that the proportion of convenience units (7.4%) was just less than the UK average (8.4%). The proportion of comparison retail units (43.9%) is significantly higher than the UK average (35.8%). However, the proportions of A1 and A2 service uses and A3, A4 and A5 uses are all below the UK average. There was an above representation of betting offices / casinos, with the proportion of these uses being 2.4 percentage points above the UK average. Most noticeably, the proportion of vacant units (24.3%) is more than double the UK average (11.8%). Almost all of the vacant units are have an internal floorspace of 200 sq. m or less.

5.4 Birkenhead is well-represented by retailers and contains 20 of the 31 'major retailers' identified by Experian Goad. These include Marks & Spencer, House of Fraser, Next and Primark.

5.5 There are few leisure uses within the Core Shopping Area; however, a Mecca Bingo is present. Outside the Core Shopping Area are the Council-run Europa Pools and a Vue cinema.

5.6 Retail rents have decreased since 2008 and were forecast to decrease again between 2014 and 2015.

5.7 The main development opportunities in the core shopping area comprise the former Rank Bingo hall, a cleared site adjacent to the Pyramids shopping centre car park (which has had a previous planning permission for mixed use redevelopment), and the former Netto food store on Salisbury Street which has very limited on-site parking.

5.8 Significant investment took place in the 1990s resulting in the creation of Europa Square, the bus station, new market frontage and new street furniture, plus the removal of the Conway Street flyover. Environmental quality within the Pyramids Shopping Centre is considered to have remained very good.

- 5.9 The centre is easily accessible by public transport and benefits from a relatively modern bus station in the heart of the shopping centre adjacent to Birkenhead Market. Conway Park and Birkenhead Central Stations offer frequent train services on the local Merseyrail network.

Bromborough Village Health Check Summary

- 5.10 The proportion of convenience retail units in Bromborough Village (10.8%) is above the UK average (8.4%). Similarly, the proportion of A2 service units exceeds the UK average by 4.1 percentage points. However, the proportion of A3 restaurant / café units (6.8%) is below the UK average (9.0%). The proportion of vacant units is 3.7 percentage points below the UK average and this suggests a healthy centre.
- 5.11 Bromborough Village only contains 1 of the 31 'major retailers' identified by Experian Goad, this being the Boots store in the Rake Precinct.
- 5.12 The Croft Retail and Leisure Park is located approximately 500 metres from the edge of the village centre and is a major comparison goods destination. Aside from this, there is an Asda superstore and a range of leisure uses including an Odeon cinema, health and fitness centre, bingo hall and a range of restaurant and fast-food outlets.
- 5.13 There are no sites currently available for re-development and no obvious room for expansion of the centre, which is constrained by residential areas.
- 5.14 The environmental quality of Bromborough Village is generally good, although the pedestrian routes between the centre and car parking are poorly lit and could be perceived as uninviting.
- 5.15 There are frequent bus services available to Liverpool and Chester. Bromborough Rake railway station is located within 1km of the edge of the centre.

Heswall Health Check Summary

- 5.16 Heswall is under-represented in terms of the proportion of convenience goods retail units (6.5%) present, when compared to the UK average (8.4%). Furthermore, Heswall has a low proportion of comparison goods units compared to the UK average (less than the UK average by 6.2 percentage points). The proportion of A1 service, A2 service and A3 restaurant / café units are greater than the UK average (by 4.9, 6.0 and 2.3 percentage points respectively). The proportion of vacant units (11.3%) is comparable to the UK average (11.8%).
- 5.17 Heswall has just 4 of the 31 'major retailers' identified by Experian Goad, which include Marks & Spencer Simply Food, Boots, WH Smith and Tesco. Other national retailers in the centre are Aldi and Iceland, Vision Express and M & Co Clothing. However, Heswall does have a strong independent retail sector with a number of long-established businesses.

- 5.18 Aside from a parade of shops to the southern end of Telegraph Road and a Sainsbury's Local convenience store on Pensby Road, there is no significant out-of-centre retail development near to the town centre.
- 5.19 There are no sites currently available within Heswall for re-development.
- 5.20 The overall environmental quality of Heswall is good, however, traffic congestion at the Telegraph Road / Pensby Road / The Mount junction and the narrow footways have the potential to impact on the environmental quality in this part of the centre.
- 5.21 A bus station is located on Telegraph Road. Heswall railway station is not within reasonable walking distance from the town centre but is linked to the centre by bus services.

Hoylelake Health Check Summary

- 5.22 The proportion of comparison retail units in Hoylelake (26.8%) is much lower than the UK average (35.8%). In contrast, the proportion of A2 service units and A3 restaurant / café units are both well-above the UK average (by 8.4 and 5.0 percentage points). The proportion of convenience units (7.6%) is comparable to the UK average (8.4%), as is the proportion of vacant units (11.5% compared to a UK average of 11.8%).
- 5.23 Hoylelake contains 2 of the 30 'major retailers' identified by Experian Goad, these being Dixons Carphone Warehouse and a Sainsbury's Local store on Market Street. In common with Heswall, Hoylelake's main strength is the large number of independent retailers present within the centre.
- 5.24 There is a parade of shops adjacent to Meols station, however, aside from this, there are no significant retail uses outside the core shopping area.
- 5.25 The potential for growth or change in the centre is significantly constrained by its linear form and the predominantly residential areas immediately to the rear of most of the retail frontages. There are no development sites currently available within the core shopping area. Redevelopment of existing sites/premises – should they be deemed surplus to requirements – would therefore be necessary, requiring existing uses to be re-provided elsewhere if needed.
- 5.26 The environment and public realm within Hoylelake is generally of a high quality.
- 5.27 The centre is easily accessible by public transport and has a large residential catchment within easy walking distance. Market Street is on the main bus routes through the centre, providing both direct and connecting services to other parts of the Borough. The Wirral Coastal Trail crosses the western end of the town centre at Kings Gap and there is a frequent rail service from Hoylelake railway station to Liverpool City Centre and Birkenhead.

Liscard Health Check Summary

- 5.28 As with Heswall and Hoylake, Liscard is under-represented in terms of the proportion of comparison units (28.7%) when compared to the UK average (35.8%). Likewise, Liscard is under-represented in the convenience goods sector, with the proportion of convenience goods units being 1.4 percentage points below the UK average. The proportion of A3 restaurant/café units is 3.1 percentage points below the UK average. The proportion of vacant units is 16.8%, which is significantly above the UK average of 11.8%. On a more positive note, the proportion of A1 service units is 9.0 percentage points above the UK average.
- 5.29 Liscard contains almost a third (30%) of the 'major retailers' identified by Experian Goad, including Tesco, Boots, Burton, Dorothy Perkins, New Look and Primark.
- 5.30 In terms of edge or out-of-centre retail uses in the immediate area there is nothing significant. However, there are shopping parades on Mill Lane, Wallasey Road, Seaview Road and Rake Lane, along with the Marine Point development in New Brighton and Junction 1 Retail Park at Bidston.
- 5.31 There is no obvious scope for physical expansion of the core shopping area, because of the presence of the gyratory and surrounding high density residential areas. A cleared site behind the facade of the former Capitol Bingo remains undeveloped.
- 5.32 The environmental quality of Liscard could be perceived as needing improvement; the centre has seen limited investment in public realm enhancements since the 1990s. It should be noted that the car parks within the centre are poorly lit and could be seen as uninviting at night time.
- 5.33 The centre is easily accessible by bus and benefits from a modern bus station/interchange. The centre is remote from the rail network, but local residents can take advantage of a rapid bus services via the Wallasey tunnel to Liverpool; Liverpool has the greatest draw amongst Wallasey residents for comparison retail shopping.

Moreton Health Check Summary

- 5.34 The proportion of convenience retail units in Moreton (11.3%) is above the UK average (8.4%). Furthermore, Moreton has a proportion of A1 service units that is almost double that of the UK average. However, the centre is under-represented in terms of the proportion of units used for the sale of comparison retail goods (7.4 percentage points below the UK average). There is a lower proportion of A2 service, A3 restaurant/café and A4 pubs/bars than the national average. On a positive note, the proportion of vacant units in Moreton (9.9%) is below the UK average (11.8%).
- 5.35 Moreton has just 3 of the 30 'major retailers' identified by Experian Goad, which include Tesco, Boots and Superdrug. Convenience retail provision in the

- centre aside from Tesco includes a Co-op supermarket, Iceland and Heron Frozen Food stores. There is a proliferation of charity shops within the centre.
- 5.36 Moreton contains a number of high street banks and financial and professional services in addition to other community facilities.
- 5.37 There are a number of town centre uses located to the west of the centre and beyond the town centre boundary along Hoylake Road, culminating in a small cluster of shops including a Tesco Express and A1 comparison and service uses located some 700 metres from the central area at the Hoylake Road / Saughall Road / Millhouse Lane crossroads.
- 5.38 Similarly, several retail and service uses are situated in an easterly direction along Hoylake Road, including a medium-sized Aldi supermarket located 700 metres east of the centre at the junction between Hoylake Road and Stavordale Road.
- 5.39 There are no development sites/premises currently available within Moreton Town Centre. Redevelopment of existing sites/premises – should they be deemed surplus to requirements – would therefore be necessary, requiring existing uses to be re-provided elsewhere if needed.
- 5.40 Moreton is a relatively clean and perceptibly pleasant centre, with no notable problems with litter or graffiti, although there is minimal street furniture present.
- 5.41 Impact of vehicular traffic on the centre is high as the busy A551 (Pasture Road/Upton Road) and A553 (Hoylake Road) converge on the centre at Moreton Cross. This does mean however, that the centre is well served by bus. The main railway station is located on Pasture Road over 700 m from Moreton Cross, on the West Kirby branch of the Wirral line.

Prenton (Woodchurch Road) Health Check Summary

- 5.42 Prenton is a small centre with just 54 retail and service units, so care must be taken when comparing the diversity of uses with national averages. Prenton does have three significant convenience retail stores – Sainsbury's, Aldi and Farmfoods – but numerically is under-represented in terms of the proportion of convenience goods units (5.6%) when compared with the UK average (8.4%). Prenton also has an under-representation of comparison goods retail units, with the proportion of comparison goods units being 19.1 percentage points below the UK average. Prenton is well-represented by A1 service, A2 service and A5 hot food / takeaway units with the proportion of all of these uses being above the UK average. Prenton does not contain any A4 pubs / bar uses. The proportion of vacant units within Prenton (11.1%) is comparable to the UK average (11.8%).
- 5.43 The aforementioned Sainsbury's store and a Boots pharmacy are the only retailers in Prenton on the 30 'major retailers' list identified by Experian Goad.

- 5.44 Prenton is an important location for local financial and professional services, with a significant number of estate agencies, banks and accountants located along Woodchurch Road.
- 5.45 There are a small number of A1 and A2 service units (including some vacant units) located east of the Storeton Road/Woodchurch Road crossroads, which are within 300 metres of the designated centre boundary, plus the Halfway House pub and a restaurant on Storeton Road.
- 5.46 There are two cleared sites within the centre that have potential for redevelopment. The former Esso Mountwood Garage site (0.11 ha) had planning permission for mixed use A1, A2 and A3 uses (consent expired in November 2015) and is currently in use as a hand car wash. There is also a small cleared site adjacent to 347 Woodchurch Road (0.05 ha).
- 5.47 The environment and public realm is considered to be of a reasonable quality, however, there are isolated areas that clearly could benefit from environmental enhancement and reinvigoration of the public realm.
- 5.48 The centre is easily accessible by bus along Woodchurch Road, with journey times assisted by a dedicated bus lane, but the centre is remote from the rail network.

West Kirby Health Check Summary

- 5.49 West Kirby is well-represented in the comparison retail sector, with the proportion of comparison retail units (40.1%), well above the UK average (35.8%). Furthermore, West Kirby has just four vacant units, which represent just 2.4% of the units within West Kirby; this is significantly below the UK average of 11.8%. The proportion of A2 service and A3 restaurant / café units are 4.9 and 4.2 percentage points above the respective UK averages. The proportion of convenience units (9.0%) is comparable to the UK average (8.4%).
- 5.50 West Kirby contains only 2 of the 30 'major retailers' identified by Experian Goad, these being Boots and Superdrug. West Kirby's convenience retail offer is limited in the main to the Aldi store on Bridge Road and the Morrisons store on Dee Lane.
- 5.51 The centre is also an important location for local financial and professional services, with a significant number of estate agencies, banks and accountancies located in the centre. In addition, there is evidently a vibrant food and beverage offer in the centre.
- 5.52 There are no edge or out-of-centre retail facilities of significance near to the centre.
- 5.53 There are no current retail development sites in West Kirby with planning permission. Redevelopment of existing sites / premises, should they be deemed surplus to requirements, would therefore be necessary, requiring existing uses to be re-provided elsewhere if needed.

- 5.54 Whilst the streetscape is considered to be of a reasonable quality, there are areas that could arguably benefit from some environmental enhancements and renewals to the public realm. The Edwardian canopies in particular along Banks Road and Acacia Grove, are considered to be in need of repair.
- 5.55 The centre is easily accessible by public transport and benefits from West Kirby train station being located in the heart of the centre with a frequent train service to Birkenhead and Liverpool.

6.0 **Assessment of Retail Needs**

Methodology

6.1 The Wirral Retail and Leisure Study Update 2015 is informed by a household survey (undertaken by North East Market Surveys – NEMS) of convenience and comparison retail shopping patterns as well as choices of leisure destinations amongst the resident population as of May 2015.

6.2 Whilst the capacity assessments are undertaken on a constant-market share approach, consideration is also given of the potential for uplift in retention within Wirral of locally generated retail expenditure and the implications this could have for retail capacity. Capacity pro-rata to the market share of retail floorspace outside of defined town centres is associated where appropriate with higher-order centres or identified as being available to support growth in local needs retail provision. This is a recognised and standard approach.

Population and Expenditure Data

6.3 The market shares recorded by the NEMS household survey are applied to the most up-to-date population and expenditure data to assess current trading patterns and retail capacity at 2015 and project forward capacity for additional retail floorspace to 2020, 2025 and 2030.

6.4 The 2011 Census is used to derive base population data and is consistent with typical approaches adopted in the writing of retail studies and previous iterations of the Wirral retail study. Population is projected forward having regard to the 2012-based Sub-National Population projections [SNPP] for Wirral. It is worth noting that the 2011 census shows an increase in resident population (at 2015) from a predicted 307,000 in the 2012 update (based upon the 2001 census) to a predicted 321,000 in this 2015 study.

Commitments

6.5 The assessment of retail need in this section of the study does not take account of existing commitments. Commitments that come forward will reduce the overall capacity for new floorspace. In any event, at the time of writing, there were no commitments for significant retail floorspace in the Borough, other than Wirral Waters.

6.6 In the case of Wirral Waters, there is a 23 year outline planning permission for a level of economic and housing growth to meet a strategic or potentially a regional need, with implementation of the consented 30,000 sq. m (gross) of A1 floorspace tied to the provision of the residential and office elements of the scheme to meet the need of that wider development, rather than the requirements of the existing community. Given this, and that the timetable for delivery is uncertain, Wirral Waters cannot sensibly be factored into a conventional retail capacity assessment.

Constant Market Share Approach

- 6.7 A constant market share approach is adopted. This means that from 2015 onwards, future capacity is calculated on the basis that the shopping patterns and market shares recorded by the 2015 household survey and presented in this study will remain unchanged over the forecasting period.
- 6.8 On occasion it is necessary to make adjustments to existing shopping patterns to take account of recently developed retail floorspace that is yet to achieve a settled pattern of trading (either within a study area or in respect of destinations outside of a study area that do or are likely to have an influence on shopping patterns within a study area); i.e. the market share of a destinations and/or centre might be expected to change once a settled pattern of trading is achieved. Incremental and piecemeal changes in retailer representation happen continually and most will not have a material impact on shopping patterns.
- 6.9 Whilst for major new floorspace/representation it is reasonable to assume that it will take two years for a settled pattern of trading to be established and an adjustment to existing shopping patterns might be required if a study is undertaken within that first two years of trading, such an adjustment is only required in limited circumstances. No such circumstances exist in respect of modelling capacity for Wirral Borough (no major new retail developments have opened in the last two years) and it is reasonable for this study to proceed unfettered on a constant market share approach.

Capacity Attributable to Out-of-Centre Floorspace

- 6.10 Adopting a constant market share approach means that a significant proportion of capacity is calculated as attributable to out-of-centre floorspace. The NPPF and Planning Practice Guidance advocate a town centre first approach to accommodating new retail floorspace and, to be consistent with this, this study transfers to the nearest appropriately sized town centre any capacity generated that is attributable to out-of-centre retail floorspace.

Expenditure Leakage

- 6.11 Leakage of expenditure from a locality, and the potential for new floorspace to enact a claw-back of this, can be indicative of additional capacity. This has potential relevance to Wirral Borough in the comparison retail sector; retention of convenience retail goods expenditure is almost at 100% and very unlikely to be elevated further. The 2009 study did some sensitivity testing of changes in the retention rate in relation to Wirral Waters. However, we are of the opinion that it is not for a borough-wide retail study to give consideration to claw-back and the implications of this on capacity. A retail assessment submitted with any planning application proposing new retail floorspace outside of the Borough's town centres would be expected to consider the potential for a claw back of expenditure and the implications this has on trade diversion and the likely impact of a proposed development.

Floorspace Efficiencies

- 6.12 An allowance is made for the turnover of existing comparison retail floorspace increasing its performance by 2.5% per annum, as a result of the more efficient use of floorspace. This is an NLP assumption based on Figure 4b of the Experian Retail Planner Briefing Note 12.1 (October 2014). 2.5% is a more modest rate of floorspace efficiency than was adopted commonly prior to the beginning of the economic downturn in 2008 and the reserved approach is a reflection of continued economic uncertainty in the retail sector. The adoption of an annual increase in comparison retail floorspace performance of 2.5% is however higher than those rates adopted in the 2009 Retail Study reflecting the subsequent upturn in the economy. In the 2009 study the following annual efficiency increases were assumed; 0.68% (2009-2016), 2.20% (2016-2021) and 1.60% (2021-2026).
- 6.13 This continued uncertainty over future improvements in trading performance is also the reasoning behind the adoption in the convenience retail capacity assessment of zero growth in floorspace efficiencies over the period to 2030.
- 6.14 New forms of retailing have emerged in recent years as an alternative to more traditional high-street shopping. Home/electronic shopping has expanded considerably and therefore the proportion of shopping transactions undertaken remotely has increased.
- 6.15 The implications on the demand for retail space are unclear. Some retailers and particularly foodstores operate online sales from their traditional retail premises. Growth in online sales may not always mean that there is a reduction in the need for retail floorspace.
- 6.16 Given that internet shopping is likely to continue increasing in proportional terms, despite uncertainties over the nature and magnitude of growth, this assessment adopts relatively cautious growth projections for retail expenditure.

Quantifying Capacity

- 6.17 Set out below is a summary of the convenience and comparison retail capacity assessments included at **Appendix 3**. The capacity assessments are by town, for the Sub Regional Town Centre Birkenhead, the other Town Centres of Heswall, Liscard, Moreton and West Kirby and the District Centres of Bromborough Village, Hoylake and Woodchurch Road, Prenton. Capacity for local needs provision (pro-rata to the market share of the network of local centres in the Borough) is given as a single quantum, on the expectation that planning for growth in existing (or for new) local centres is best achieved through a qualitative analysis of current provision and its geographical spread. The capacity assessment assesses the overall Borough-wide potential for new local needs provision.
- 6.18 Capacity for each centre (and the local centres collectively) is calculated by dividing the growth in expenditure attributable to that centre, assuming a constant market share, by a typical sales density. The full schedule of capacity

calculations is at Table 12 (convenience) and Table 19 (comparison) of **Appendix 3**.

- 6.19 The sales densities adopted reflect the varying scales and format of retailing that is likely to be attracted to each centre. In the convenience retail sector:
- £11,500/sq. m⁶ is adopted for Birkenhead Sub Regional Town Centre, and Heswall, Liscard, Moreton and West Kirby town centres – which approximates to the average convenience retail sales density of the nine principal food retailers (Aldi, Asda, Co-op, Lidl, M&S, Morrisons, Sainsbury's, Tesco and Waitrose);
 - £9,000/sq. m⁶ is adopted for the District Centres (the average of Aldi, Co-op, Lidl and M&S company average sales densities); and
 - £6,000/sq. m⁶ is adopted for the Local Centres (the average of Co-op and Spar company average sales densities).
- 6.20 In the comparison retail sector, £5,000/sq. m is adopted for Birkenhead, with £4,000/sq. m adopted for the other defined town centres, £3,500 for the district centres and £3,000 for the local centres. In contrast with the convenience retail assessment, capacity for additional comparison retail floorspace across local centres is given for the two centres where specific capacity is identified in addition to an overarching figure for other local centres. Whereas in the convenience retail sector the findings of the study identified a broad geographical spread of scope for additional local centre convenience retail provision, scope in the comparison retail sector (on a constant market share basis) is focused upon Wallasey Village and Grange Road West (Birkenhead). Given Grange Road West's proximity to Birkenhead town centre it is considered that any additional comparison capacity could also be directed to the town centre.
- 6.21 Capacity is presented as a net sales area, as it is this figure that is relevant to retail impact assessments required by the NPPF. The gross floorspace of retail developments will always be greater than the net trading area, but the ratio between net and gross floorspace varies greatly. The net sales area in a corner shop might be up to 90% of the gross, whereas the equivalent figure for a large format foodstore might be as little as 60%. For these reasons, it is robust for a retail assessment to present floorspace capacity as a net figure.
- 6.22 There are references in the following section to convenience retail floorspace trading at above or below expected levels. The convenience retail assessment which follows compares the survey derived turnover of convenience retail destinations with expected (benchmark) turnover levels. The expected turnover of a convenience retail destination is the turnover that it would achieve were it to trade at company average (for named foodstores) or typical (for other floorspace) sales densities. Comparing survey derived turnover with benchmark turnover for convenience retail floorspace gives an indication as to whether destinations are trading above or below what might be expected.

⁶ The actual average using an NLP methodology that includes VAT at 3% to account for convenience retail items that are VAT applicable is £11,369/sq. m in 2013 prices

Floorspace data to inform this benchmark assessment is derived from a number of sources including previous retail studies, Oxford Retail Consultants (ORC) Store Point, Experian GOAD and planning application data.

- 6.23 In the comparison retail sector, it is assumed that the 2015 survey-derived performance of floorspace in the Borough is its benchmark position. The comparison retail capacity assessment at Table 19 of **Appendix 3** adopts an approach whereby existing floorspace within the Borough will increase its benchmark turnover in real terms from 2015 to 2030 at a growth rate of 2.5% per annum. Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of spending growing at faster rates than new floorspace provision and the ability of retailers to absorb real increases in their costs by increasing their turnover to floorspace ratio.

Borough Quantitative Capacity

Convenience Retail Goods

- 6.24 Cumulative growth in the convenience retail goods spending power of the adopted study area (which largely equates to the Borough) is £16.9m to 2020, £37.6m to 2025 and £59.1m to 2030 (Table 3a at **Appendix 3**).
- 6.25 The NLP capacity assessment follows an accepted methodology of applying available retail expenditure pro-rata to the market shares of destinations. It is also appropriate to take into account the performance of existing retail floorspace, compared with expected levels of performance. In circumstances where existing floorspace is assessed to be underperforming, it is appropriate for organic growth in spending to be first absorbed by this underperforming floorspace. Conversely, where existing floorspace is assessed to be performing above expected levels, this can add to the identified capacity for new retail floorspace.
- 6.26 It should be noted that there is a distinct difference between overtrading and performing above expected levels. A store may trade above expected levels without this being a disincentive to existing customers. Overtrading, on the other hand, is where a store becomes so busy (evidenced by overcrowding and congestion at checkouts and in the car park and so on), that its' performance is affected as customers decide to shop elsewhere. As such, where a store is both performing above expected levels and there is also evidence of overtrading, this would be indicative of a need for additional floorspace.
- 6.27 Capacity pro-rata to the market share of out-of-centre floorspace is associated with appropriate defined centres, in accordance with the NPPF principles of town-centre-first retail development.

Comparison Retail Goods

- 6.28 Growth in comparison retail goods spending power of the adopted study area is £137.5m to 2020, £341.7m to 2025 and £586.8m to 2030 (Table 3b at **Appendix 3**).
- 6.29 The approach that NLP adopts in the calculation of comparison retail capacity is consistent with the approach adopted in the convenience retail sector, with the exception of the assumption that comparison retail floorspace at 2015 is trading at a level that is consistent with what might be expected. It is not feasible to 'benchmark' the expected turnover of comparison retail floorspace in town centres given the number of different trading fascias and particularly when there is a high proportion of independent retailers. It is year-on-year growth in comparison retail spending that accounts for capacity over the period to 2032.
- 6.30 A constant market share approach is adopted. From 2015 onwards, future capacity is calculated on the basis of the market shares recorded by the 2015 household survey and presented in this study.
- 6.31 Again, capacity pro-rata to the market share of out-of-centre retail parks is associated with appropriate defined centres, in accordance with the NPPF principles of town-centre-first retail development.

Sub-Regional Town Centre - Birkenhead

- 6.32 Table 6.1 sets out the current convenience retail capacity in Birkenhead and the capacity for additional convenience and comparison retail floorspace over the periods to 2020, 2025 and 2030.

Table 6.1 Quantitative capacity for additional convenience and comparison retail floorspace - Birkenhead

Year	Convenience*		Comparison**	
	£(m)	sq. m (net)	£(m)^	sq.m (net)^
At 2015*	18.7	1,630	-	-
By 2020	22.3	1,943	4.3	762
By 2025	26.8	2,327	29.1	4,552
By 2030	31.3	2,725	63.0	8,694

*Convenience sales density of £11,500 sq. m (based upon Aldi, Asda, Co-op, Lidl, M&S, Morrisons, Sainsbury's, Tesco and Waitrose. No growth in floorspace efficiency over the period to 2030.

**Comparison sales density of £5,000 per sq. m at 2015 increased by floorspace efficiencies to 2026 of 2.5% per annum.

^2020, 2025 and 2030 comparison retail capacity assumes Wirral Borough retains a constant market share.

Convenience Retail Goods

- 6.33 Table 6.2 indicates that convenience retail trading performance of the Marks and Spencer foodhall in the Grange Precinct is below what would be expected when compared with company average levels. Conversely Asda at Grange Road is trading at above expected levels. It is worth stating that performance

against expected trading level is considered as one. Therefore if a store is trading below benchmark turnover this reduces the scope for additional floorspace. However this reduction in scope for additional floorspace may be negated in part or fully by a store that is trading at above benchmark turnover.

- 6.34 Outside of Birkenhead town centre, one Asda store – at Stanley Road, is trading at above expected levels, as is an Iceland foodstore also at Stanley Road. The Tesco Extra at Bidston by contrast, is significantly underperforming.

Table 6.2 Survey derived turnover of main foodstores compared with expected trading levels

Store	Benchmark Turnover (£m)	Survey Derived Turnover (£m)	Difference (£m)
Town Centre			
Asda, Grange Road	28.7	33.0	4.3
Marks and Spencer, Grange Precinct	7.8	4.7	-3.1
Out-of-Centre Stores			
Asda, Stanley Road	12.6	13.2	0.6
Iceland, Stanley Road	3.7	3.9	0.2
Tesco Extra, Bidston Link Road, Bidston	51.1	30.9	-20.2

Source: NEMS Household Survey March 2015/Various sources for benchmark turnover

- 6.35 The recorded convenience retail surplus⁷ generates immediate capacity for meaningful additional convenience retail floorspace. Net convenience retail floorspace of 1,630 sq. m translates into capacity for a store with a gross sales area of 2,500 sq. m to 3,500 sq. m dependent upon the split between convenience and comparison retail goods. By way of comparison, Asda at the Grange Precinct has net convenience retail floorspace of approximately 1,700 sq. m and a gross sales area of approximately 3,900 sq. m.
- 6.36 A caveat to this relates to the performance of the Tesco Extra store located off Bidston Link Road. The store draws 20% of its turnover from the Liscard area, 23% from the three Birkenhead zones (Zones 4A, 4B and 4C) and over 27% from the Moreton area (considered below). However, its overall survey-recorded turnover of £30.9m is over £20.0m less than would be the case were it to trade at its benchmark level of £51.1m. Any upturn in the market share of this Tesco Extra store could see this store absorbing some of the capacity that is generated by existing foodstores in Birkenhead trading at above expected levels.
- 6.37 Capacity over the period to 2030 increases to 2,725 sq. m net. The level of capacity identified is sufficient to support immediately a medium-sized store (of small superstore format) capable of performing a bulk food shopping role. The capacity identified in the longer term would be sufficient to support a further small to medium-sized foodstore with a net convenience retail sales area of some 1,000 sq. m. Again, to provide context, the size of such a foodstore would likely come from a spectrum encompassing the Aldi/Lidl or M&S Foodhall format.

⁷ Includes capacity pro-rata to the market share of out-of-centre floorspace associated with Birkenhead town centre (see Appendix 3 for full details)

Comparison Retail Goods

- 6.38 Table 14 at **Appendix 3** summarises the current comparison retail performance of destinations in Wirral Borough. As it is assumed that destinations in Wirral are trading at expected levels at 2015, it is year-on-year growth in comparison retail spending that accounts for capacity over the period to 2030.
- 6.39 In order that this study accords with the Government commitment to a town centre first approach to retail development, the capacity for additional floorspace in Birkenhead is boosted by factoring-in growth pro-rata to the market share of the Croft Retail Park (Bromborough) and other out-of-centre floorspace⁸. Whilst the Croft Retail Park is nearer to Bromborough Village district centre than Birkenhead, the market share of the out-of-centre destination and the resultant future capacity generated on a pro-rata growth basis means that this growth is more appropriately associated with Birkenhead than with Bromborough Village.
- 6.40 Capacity for 762 sq. m (net) of additional comparison retail goods floorspace in Birkenhead is identified by 2020, increasing to 4,552 sq. m by 2025 and 8,694 sq. m by 2030. The additional capacity identified in the long term to 2030 is significant and would enable a sizeable extension to the comparison retail offer of the Sub-Regional Town Centre and/or uplift in floorspace as part of any redevelopment of the existing shopping centres.
- 6.41 High street retailers are seeking increasingly larger units and NLP advises that the Council considers encouraging the development of a small number of larger units to accommodate the requirements of key national multiples and ensure that Birkenhead town centre continues to be competitive in the sub-region and against retail park floorspace. Redevelopment and reconfiguration of the existing shopping centres provides an opportunity to deliver larger units to meet retailer demands, although this should be a longer-term plan given that it is only in the latter part of the five years from 2020 that the capacity for additional comparison retail floorspace reaches a level that would support significant uplift in town centre floorspace.

Town Centres - Heswall

- 6.42 Table 6.3 sets out the current convenience retail capacity in Heswall and the capacity for additional convenience and comparison retail floorspace over the periods to 2020, 2025 and 2030.

⁸ Growth pro-rata to the market share of out-of-centre retail floorspace in the comparison retail sector is linked as appropriate with Birkenhead, Liscard and Moreton town centre

Table 6.3 Quantitative capacity for additional convenience and comparison retail floorspace - Heswall

Year	Convenience*		Comparison**	
	£(m)	sq. m (net)	£(m)^	sq.m (net)^
At 2015*	21.5	1,873	-	-
By 2020	23.3	2,026	0.2	51
By 2025	25.5	2,214	1.5	302
By 2030	27.7	2,409	3.3	576

*Convenience sales density of £11,500 sq. m (based upon Aldi, Asda, Co-op, Lidl, M&S, Morrisons, Sainsbury's, Tesco and Waitrose. No growth in floorspace efficiency over the period to 2030.

**Comparison sales density of £4,000 per sq. m at 2015 increased by floorspace efficiencies to 2026 of 2.5% per annum.

^2020, 2025 and 2030 comparison retail capacity assumes Wirral Borough retains a constant market share.

Convenience Retail Goods

6.43

Table 6.4 indicates that with the exception of the M&S Simply Food store, existing convenience retail floorspace in Heswall is trading at significantly above expected levels. This provides clear evidence there is immediate capacity in the town for the provision of additional convenience retail floorspace. Following a theme common to other Aldi fascia stores in the Borough, the May Road store is trading at significantly above expected levels (recording at turnover that is nearly 100% greater than the benchmark position). The Telegraph Road Tesco is recorded as trading at nearly 90% above its benchmark position.

Table 6.4 Survey derived turnover of main foodstores compared with expected trading levels

Store	Benchmark Turnover (£m)	Survey Derived Turnover (£m)	Difference (£m)
Town Centre			
Aldi, May Road	9.2	18.1	8.9
M&S Simply Food, Telegraph Road	6.4	5.8	-0.6
Tesco, Telegraph Road	21.5	40.5	19.0

Source: NEMS Household Survey March 2015/Various sources for benchmark turnover

6.44

The fact that existing convenience retail floorspace in the town is trading at significantly above expected levels means that there is immediate capacity for a foodstore with a net convenience retail trading area of approaching 1,900 sq. m. This is comparable with the convenience retail trading area of the Telegraph Road Tesco, which is recorded as being marginally above 1,900 sq. m. Over the Core Strategy period to 2030, net convenience retail capacity in Heswall is set to increase to 2,026 sq. m by 2020, 2,214 sq. m by 2025 and 2,409 sq. m by 2030. It is the performance of existing stores in the town that generates the majority of the capacity identified and, as such, growth long term as a result of year-on-year growth in residents' spending power is more modest than the immediate need. If the requirement for an additional medium-sized foodstore were to be met early in the Core Strategy period (as it is suggested is required)

then the scope longer term is restricted to more top-up and local needs type shopping provision.

Comparison Retail Goods

- 6.45 Capacity for additional comparison retail floorspace in Heswall in the short term to 2020 is only some 50 sq. m. Over the long term this capacity increases to a more meaningful 576 sq.m by 2030.
- 6.46 The capacity identified over the period covered by the Core Strategy is of a scale sufficient to support the development of modest additional comparison retail floorspace in the town. Heswall is characterised by smaller-scale comparison retail premises and, whilst NLP recommends generally that the Council seeks to encourage the development of modern large-format retail units, the character of Heswall and the magnitude of the comparison retail capacity identified suggests that smaller scale intervention within the central area of the town is the most likely route to satisfying the capacity identified. The objective should be to strengthen the offer of the town centre, with the aim of increasing its performance in the local retail hierarchy and allowing it to continue serving local needs and compete more effectively with other higher order centres and out-of-centre retail destinations.

Town Centres - Liscard

- 6.47 Table 6.5 sets out the current convenience retail capacity in Liscard and the capacity for additional convenience and comparison retail floorspace over the periods to 2020, 2025 and 2030.

Table 6.5 Quantitative capacity for additional convenience and comparison retail floorspace - Liscard

Year	Convenience*		Comparison**	
	£(m)	sq. m (net)	£(m)^	sq.m (net)^
At 2015*	26.7	2,319	-	-
By 2020	29.1	2,526	0.8	179
By 2025	32.0	2,780	5.5	1,069
By 2030	35.0	3,043	11.8	2,042

*Convenience sales density of £11,500 sq. m (based upon Aldi, Asda, Co-op, Lidl, M&S, Morrisons, Sainsbury's, Tesco and Waitrose. No growth in floorspace efficiency over the period to 2030.

**Comparison sales density of £4,000 per sq. m at 2015 increased by floorspace efficiencies to 2026 of 2.5% per annum.

^2020, 2025 and 2030 comparison retail capacity assumes Wirral Borough retains a constant market share.

Convenience Retail Goods

- 6.48 Asda Seaview Road, which is the only large convenience retail store in Liscard, is trading at considerably above expected levels (£50.7m recorded by the household surveys compared with a benchmark turnover of £30.3m – equivalent to trading at two-thirds more than expected levels). The extent to which the store is recorded as trading at above expected levels is eclipsed by

the Iceland on Liscard Way, which is shown to be trading at more than three times its trading position at benchmark levels.

6.49 Whilst some doubt has to be drawn over the reality of the Iceland performance (given that any retail store has a maximum turnover threshold relative to its size), it is clear that the town centre stores are performing well in excess of expected levels. It is noted that two Iceland stores have opened recently at Marine Point and Stanley Road. It is considered feasible that some respondents may have been referring to either of these stores as opposed to Iceland, Liscard Way.

6.50 The strong performance of town centre convenience retail stores is replicated by the Lidl at Leasowe Road. This store, in common with a number of Aldi fascia stores elsewhere in the Borough, is shown to be trading at a level that is considerably in excess of what would be expected. Despite the Marine Point Morrisons trading at below expected levels, the performance of the other convenience retail stores generates immediate capacity for additional convenience retail floorspace.

Table 6.6 Survey derived turnover of main foodstores compared with expected trading levels

Store	Benchmark Turnover (£m)	Survey Derived Turnover (£m)	Difference (£m)
Town Centre			
Asda, Seaview Road	30.3	50.7	20.4
Iceland, Liscard Way	1.9	6.0	4.1
Out-of-Centre Stores			
Lidl, Leasowe Road	5.7	13.2	7.5
Morrisons, Marine Point	25.3	20.0	-5.3

Source: NEMS Household Survey March 2015/Various sources for benchmark turnover

6.51 At 2015, there is capacity for up to 2,319 sq. m of additional convenience retail floorspace, which increases to 3,043 sq. m by 2030. The capacity identified is more than sufficient to accommodate a store of comparable size to the Seaview Road Asda, which has a net convenience retail sales area of under 2,000 sq. m. The Council should consider any proposals for new convenience retail floorspace in the town in the context of there being immediate capacity for additional provision and clear evidence that there is strong evidence for the qualitative improvement of the offer in the town.

6.52 A caveat in respect of the convenience retail capacity identified in Liscard (and the same comment is made in respect of Moreton) is the performance of a Tesco Extra store located off Bidston Link Road. The store draws 20% of its turnover from the Liscard area, and over 27% from the Moreton area (considered below) but its overall survey-recorded turnover of £30.9m is over £20.0m less than would be the case were it to trade at its benchmark level of £51.1m.

6.53 Whilst there is immediate scope for additional convenience retail floorspace in Liscard, there is an argument that the Tesco Extra store could absorb some of this surplus where local shopping habits change – resulting in a transfer of

market share from Asda to Tesco for example. Having regard to current trade draw patterns (20% of Tesco store turnover derived from the Liscard area) this could represent over £4.0m of the current £26.7m surplus being accounted for by upturn in the market share of the Tesco.

Comparison Retail Goods

- 6.54 There is limited capacity over the period to 2020 for additional comparison floorspace. Capacity is projected to increase to 1,069 sq. m over the period to 2025 and 2,042 sq. m over the period to 2030.
- 6.55 Capacity in the longer term is generated by factoring-in growth pro-rata to the performance of town centre comparison retail floorspace and that of the out-of-centre floorspace at the Junction One Retail Park (Bidston Moss) and off the Bidston link road.
- 6.56 The capacity identified over the period to 2030 will allow long term for the expansion of the retail offer in the town and provides the opportunity for landowners and developers to bring forward sites that have the potential to accommodate larger-format units that are suited to the current requirements of retailers in the comparison sector. Expansion in the comparison retail offer of Liscard is important if the town is to consolidate its position as an important comparison retail shopping destination amongst those residents living in the north and north east of the Borough, and its status of Town Centre in a tier below the principal Sub Regional Town Centre, Birkenhead.

Town Centres - Moreton

- 6.57 Table 6.7 sets out the current convenience retail capacity in Moreton and the capacity for additional convenience and comparison retail floorspace over the periods to 2020, 2025 and 2030.

Table 6.7 Quantitative capacity for additional convenience and comparison retail floorspace - Moreton

Year	Convenience*		Comparison**	
	£(m)	sq. m (net)	£(m)^	sq.m (net)^
At 2015*	9.8	851	-	-
By 2020	11.6	1,008	0.5	100
By 2025	13.8	1,201	3.1	597
By 2030	16.1	1,401	6.6	1,140

*Convenience sales density of £11,500 sq. m (based upon Aldi, Asda, Co-op, Lidl, M&S, Morrisons, Sainsbury's, Tesco and Waitrose. No growth in floorspace efficiency over the period to 2030.

**Comparison sales density of £4,000 per sq. m at 2015 increased by floorspace efficiencies to 2026 of 2.5% per annum.

^2020, 2025 and 2030 comparison retail capacity assumes Wirral Borough retains a constant market share.

Convenience Retail Goods

- 6.58 Co-op and Iceland operate town centre foodstores and there is a Tesco Express within the defined town centre. There are Aldi and Tesco Express

stores in less central Hoylake Road locations. There is a large-format Sainsbury's store off the Upton by-pass. These stores collectively attract some 44% of the convenience retail expenditure generated locally.

- 6.59 Nearly 30% of locally generated convenience retail expenditure is directed to the Tesco Extra store at Bidston Link Road. Noted above in the consideration of capacity for additional convenience retail floorspace in Liscard is that the apparent under-performance of this store arguably reduces the scope for additional floorspace in this part of the Borough. This is on the basis that an upturn in the market share of the Tesco store could absorb some of the capacity that is generated by existing foodstores in Moreton (and Liscard as considered above) trading at above expected levels.
- 6.60 The results of the household surveys suggest that the Co-op and Iceland stores in the town centre trade at below expected levels (the Iceland some 28% below its expected performance), whereas the Aldi and Tesco Express stores trade in excess of expected levels. The results for the in-centre Tesco Express store have been included under 'other stores, Moreton Town Centre'. However, we have separated out the results for the Tesco Express store at Hoylake Road. Whilst the large-format Sainsbury's off the Upton by-pass also trades at above expected levels, it is the Hoylake Road Aldi that is the real stand-out performer as this store trades at over twice what would be achieved at benchmark performance; again following a pattern recorded across the Borough that the so-called 'deep discounters' (Aldi and Lidl) are the fascias that are achieving the greatest success in performing beyond expected levels.
- 6.61 Whilst it possible that the household survey has over-estimated the performance of the Hoylake Road Aldi store (and others for that matter), there is a clear shift in the balance of power in the local grocery market and the margin of error is such that the Hoylake Road Aldi must be trading at significantly above expected levels. The result of this better than expected performance amongst out-of-centre stores is that, notwithstanding the under-performance of the more central Co-op and Iceland foodstores, there is significant capacity immediately for additional convenience retail floorspace in the town.
- 6.62 The convenience retail capacity identified (851 sq. m immediately increasing to 1,401 sq. m by 2030) is sufficient to support a further medium sized foodstore in the town in the longer term; notwithstanding the commentary about the performance (and existing potential to absorb additional expenditure) of the evidently under-performing Tesco at Bidston Link Road.

Table 6.8 Survey derived turnover of main foodstores compared with expected trading levels

Store	Benchmark Turnover (£m)	Survey Derived Turnover (£m)	Difference (£m)
Town Centre			
Co-op, Hoylake Road	6.7	6.1	-0.6
Iceland, Hoylake Road	3.6	2.6	-1.0
Out-of-Centre Stores			
Aldi, Hoylake Road	8.3	17.2	8.9
Sainsbury's, Upton by-pass	39.0	37.7	1.3
Tesco Express, Hoylake Road	2.4	3.7	1.3

Source: NEMS Household Survey March 2015/Various sources for benchmark turnover

Comparison Retail Goods

- 6.63 Moreton is at the lower end of the spectrum of comparison retail turnover, amongst the defined town centres across the Borough; it has the lowest recorded comparison retail turnover in the Borough in this tier of the retail hierarchy. Moreton attracts 11% of comparison retail expenditure generated locally, whilst over 50% is directed to Birkenhead town centre, the Croft Retail Park or out of the Borough to Liverpool city centre.
- 6.64 The performance of Moreton in the comparison retail sector means that, in adopting a constant market share approach, there is limited quantitative capacity for additional comparison retail floorspace in the town centre. Table 19 at **Appendix 3** also factors-in to the assessment of capacity for additional comparison retail floorspace in Moreton growth pro-rata to existing out-of-centre floorspace at Bidston/Bidston Moss and Upton (Homebase). Whilst the capacity for additional comparison retail floorspace remains modest, factoring-in growth pro-rata to this out-of-centre floorspace increasing significantly the capacity for additional floorspace; the approach adopted is consistent with the NPPF town-centre first policy.
- 6.65 Growth in spending power without any increase in market share will generate capacity for 597 sq. m net of additional floorspace over the period to 2025 and it is only in the later stage of the Core Strategy period to 2026 when the capacity calculated (1,140 sq. m) is at a level sufficient to support a material addition to high-street shop units in the town centre; albeit not any substantial floorspace addition to the current stock.

Town Centres – West Kirby

- 6.66 Table 6.9 sets out the current convenience retail capacity in West Kirby and the capacity for additional convenience and comparison retail floorspace over the periods to 2020, 2025 and 2030.

Table 6.9 Quantitative capacity for additional convenience and comparison retail floorspace – West Kirby

Year	Convenience*		Comparison**	
	£(m)	sq. m (net)	£(m)^	sq.m (net)^
At 2015*	20.3	1,765	-	-
By 2020	21.6	1,879	0.2	43
By 2025	23.2	2,019	1.3	259
By 2030	24.9	2,164	2.9	494

*Convenience sales density of £11,500 sq. m (based upon Aldi, Asda, Co-op, Lidl, M&S, Morrisons, Sainsbury's, Tesco and Waitrose. No growth in floorspace efficiency over the period to 2030.

**Comparison sales density of £4,000 per sq. m at 2015 increased by floorspace efficiencies to 2026 of 2.5% per annum.

Convenience Retail Goods

- 6.67 There is a Morrisons foodstore at the heart of West Kirby town centre on Dee Lane, and an Aldi store within the centre on Bridge Road. Over 60% of locally generated convenience retail expenditure (from study area sub-zone 1 Hoylake and West Kirby) is retained in the town centre including the Aldi store on Bridge Road. The only other destination to attract a significant proportion of locally generated convenience retail expenditure is the large-format Sainsbury's store off the Upton by-pass. Analysis of the retail capacity assessment suggests that the Morrisons store is trading some 30% above expected levels whereas the Aldi store is attracting a turnover that is over two and-a-half times what would be expected when compared with company average benchmark performance.
- 6.68 Discussed elsewhere in this section of the study is that there is an upper limit on the extent to which a foodstore can trade beyond expected levels; there is an obvious finite capacity in terms of ability to carry stock and process transactions. That said, a consistent theme in the analysis of these household survey results is that the so-called 'deep discount' retailers (Aldi in the main but also Lidl) are out-performing considerably their expected performance levels.
- 6.69 The trading performance of existing stores means that there is immediate capacity for new convenience retail floorspace in West Kirby. Table 6.9 above details that there is immediate capacity for up to 1,765 sq. m net of additional convenience retail floorspace, which could be accommodated by a new medium-sized supermarket. As capacity is largely due to the better than expected performance of existing floorspace, the increase in assessed capacity over the Core Strategy period is less significant than the immediate requirement. Capacity is shown to increase to 1,879 sq. m by 2020, 2,019 sq. m by 2025 and 2,164 sq. m by 2030.

Table 6.10 Survey derived turnover of main foodstores compared with expected trading levels

Store	Benchmark Turnover (£m)	Survey Derived Turnover (£m)	Difference (£m)
Town Centre			
Morrisons, Dee Lane	19.3	25.4	6.1
Aldi, Bridge Road	8.5	22.6	14.1

Source: NEMS Household Survey March 2015/Various sources for benchmark turnover

Comparison Retail Goods

- 6.70 Over 80% of the comparison retail turnover of West Kirby town centre (£14.6m of £18.0m) is drawn from the immediate Hoylake and West Kirby area, indicating that it has limited geographical reach in its comparison retail appeal. Its attraction of £18.0m of comparison retail expenditure gives it a market share that is just short of the market share recorded by Heswall and some 25% less than the market share of Liscard.
- 6.71 The limited existing comparison retail turnover of West Kirby and the anticipated continuation of a relatively slow growth in shopper spending power nationally mean that there is limited quantitative capacity for additional comparison retail floorspace in the town. The assessed capacity of 259 sq. m net additional floorspace over the period to 2025 might be met by extensions to existing units or taken up by comparison retail floorspace within any foodstore scheme that comes forward.

District Centres

- 6.72 Table 6.11 compares the (expected) benchmark and survey derived convenience retail turnover of principal convenience retail stores within and near to the three district centres in the Borough, in order to identify which destinations are trading at, below or above expected levels.

Table 6.11 Survey derived turnover of main foodstores compared with expected trading levels

Store	Benchmark Turnover (£m)	Survey Derived Turnover (£m)	Difference (£m)
Town Centre			
Co-op, Market Street, Hoylake	4.0	1.3	-2.7
Aldi, Woodchurch Road, Prenton	9.0	26.1	17.1
Sainsbury's, Woodchurch Road, Prenton	12.7	30.1	17.4
Co-op, Allport Lane, Bromborough	5.9	8.3	2.4

Source: NEMS Household Survey March 2015/Various sources for benchmark turnover

Bromborough Village

- 6.73 Table 6.12 sets out the current convenience retail capacity in Bromborough Village and the capacity for additional convenience and comparison retail floorspace over the periods to 2020, 2025 and 2030.

Table 6.12 Quantitative capacity for additional convenience and comparison retail floorspace – West Kirby

Year	Convenience*		Comparison**	
	£(m)	sq. m (net)	£(m)^	sq.m (net)^
At 2015*	2.4	270	-	-
By 2020	2.7	297	0.4	104
By 2025	3.0	331	2.8	623
By 2030	3.3	366	6.0	1,191

*Convenience sales density of £9,000 sq. m (based upon Aldi, Asda, Co-op, Lidl, M&S, Morrisons, Sainsbury's, Tesco and Waitrose. No growth in floorspace efficiency over the period to 2030.

**Comparison sales density of £3,500 per sq. m at 2015 increased by floorspace efficiencies to 2026 of 2.5% per annum.

Convenience Retail Goods

6.74 Convenience retail provision in Bromborough Village is limited to small convenience stores only. There is a Co-op store at Allport Lane and the household survey identifies this to be trading at in excess of 40% above expected levels. The combined performance of the Co-op and the local needs stores results in there being immediate capacity for additional convenience retail floorspace in Bromborough; this requirement increases marginally over the Core Strategy period having regard to the constant market share approach. To provide some context to the convenience retail floorspace capacity identified, the existing Co-op store is recorded as having a sales area of just less than 600 sq. m; the capacity for additional convenience retail floorspace is significantly less than this. It should be noted that the existing Asda store at Welton Road, Croft Business Park, has been associated within Birkenhead Town Centre for capacity purposes, rather than Bromborough.

Comparison Retail Goods

6.75 Setting out in Section 4.0 above is commentary on the expected shortcoming of interviewees responding 'Bromborough' to questions about comparison retail shopping habits when in fact their destination is the Croft Retail Park, Bromborough. Despite interviewees being briefed to prompt those answering 'Bromborough' with further questions to ascertain whether their response means Bromborough Village or the Croft Retail Park, it seems highly likely that the recorded comparison turnover of Bromborough Village is over-inflated.

6.76 The comparison retail capacity that is associated with the recorded turnover of Bromborough Village, when this is projected forward on a constant market share basis, is limited over the period to 2020 and then more substantial by 2025 and over the latter part of the Core Strategy period to 2030. Whilst these later years figures may be an over-estimate of the true scope for additional comparison goods floorspace in Bromborough Village because of the issues with the household survey discussed in the above paragraph, it is correct (having regard to the NPPF town-centre first approach) that this capacity is associated with a defined centre. It may be borne-out (as is quite likely to be the case) that there is neither the physical capacity nor the market demand for such a quantum of additional comparison retail floorspace in Bromborough. If

this is the case, then the capacity identified might provide the justification for additional comparison retail floorspace elsewhere in the Borough; again on the expectation that any floorspace coming forward adheres to the Government stance on a town-centre first approach.

Hoylake

6.77 Table 6.13 sets out the current convenience retail capacity in Hoylake and the capacity for additional convenience and comparison retail floorspace over the periods to 2020, 2025 and 2030.

Table 6.13 Quantitative capacity for additional convenience and comparison retail floorspace – West Kirby

Year	Convenience*		Comparison**	
	£(m)	sq. m (net)	£(m)^	sq.m (net)^
At 2015*	-	-	-	-
By 2020	-	-	0.0	12
By 2025	-	-	0.3	73
By 2030	-	-	0.7	140

*Convenience sales density of £9,000 sq. m (based upon Aldi, Asda, Co-op, Lidl, M&S, Morrisons, Sainsbury's, Tesco and Waitrose. No growth in floorspace efficiency over the period to 2030.

**Comparison sales density of £3,500 per sq. m at 2015 increased by floorspace efficiencies to 2026 of 2.5% per annum.

Convenience Retail Goods

6.78 Convenience retail provision in Hoylake comprises a Co-op and Sainsbury's Local on Market Street and independent businesses geared towards meeting day-to-day local needs. The great majority of convenience retail expenditure from the Hoylake (and West Kirby) area is directed to the Aldi and Morrisons stores in West Kirby. The household survey suggests that the Market Street Co-op trades at significantly less than expected levels. The implication of the limited market share recorded is that there is not any capacity for additional convenience retail floorspace in the town over the period to 2030, when a constant market share approach is applied. The constant market share approach in a retail capacity assessment perpetuates an outflow of expenditure from an area that has a limited retail offer. The Council might consider that, in the case of Hoylake, there is justification for seeking to boost its market share; through seeking to encourage new convenience retail floorspace despite there being a lack of capacity having regard to the findings of this study. Of course, any moves to fashion a case for an additional small-scale standalone supermarket must be minded of the context that the existing Co-op appears to trade poorly (and could be vulnerable) and any attempt to encourage an increase in the market share of Hoylake will reduce market share elsewhere and capacity for new convenience retail floorspace elsewhere; notably West Kirby.

Comparison Retail Goods

6.79 The retail capacity assessment indicates that the current comparison retail turnover of Hoylake is some £4.5m. Amongst the smaller retail centres in the Borough, this places the centre third behind Bromborough Village and Woodchurch Road, Prenton in terms of comparison retail expenditure attracted from the study area. The anticipated limited growth in comparison retail expenditure directed to Hoylake over the course of the period covered by the Core Strategy (pro-rata to existing market share) means that there is limited quantitative capacity generated for additional comparison retail floorspace. The retail capacity assessment charts that growth in retail expenditure directed to Hoylake will result in capacity for 140 sq. m net of additional floorspace over the period to 2030. This quantum of capacity will provide for one or two high-street format units or an extension to existing units.

Woodchurch Road, Prenton

6.80 Table 6.14 sets out the current convenience retail capacity in Woodchurch Road, Prenton and the capacity for additional convenience and comparison retail floorspace over the periods to 2020, 2025 and 2030.

Table 6.14 Quantitative capacity for additional convenience and comparison retail floorspace – West Kirby

Year	Convenience*		Comparison**	
	£(m)	sq. m (net)	£(m)^	sq.m (net)^
At 2015*	31.5	3,499	-	-
By 2020	33.2	3,684	0.1	16
By 2025	35.2	3,910	0.4	94
By 2030	37.3	4,145	0.9	180

*Convenience sales density of £9,000 sq. m (based upon Aldi, Asda, Co-op, Lidl, M&S, Morrisons, Sainsbury's, Tesco and Waitrose. No growth in floorspace efficiency over the period to 2030.

**Comparison sales density of £3,500 per sq. m at 2015 increased by floorspace efficiencies to 2026 of 2.5% per annum.

Convenience Retail Goods

6.81 There is an Aldi and a Sainsbury's store at Woodchurch Road, Prenton. Over a third of convenience retail expenditure generated in the south and west Birkenhead areas is directed to the stores at Woodchurch Road, Prenton. The two stores attract a significant proportion of the convenience retail expenditure generated locally. Analysis of the retail capacity assessment suggests that the both stores are trading at significantly above expected levels when compared with expected benchmark performance. Table 6.11 above sets out that the recorded turnover of the Sainsbury's (£30.1m) is more than twice its expected level of performance. The performance of the Aldi fascia store is even more out of kilter with expected levels; the turnover recorded by the household survey (£26.1m) is nearly three-times the expected turnover of the store. It should be noted that the Asda store on Woodchurch Road, Arrowe Park is associated with Birkenhead Town Centre for capacity purposes.

- 6.82 The trading performance of existing stores means that there is significant immediate capacity for new convenience retail floorspace relative to the market share recorded for Aldi and Sainsbury's stores. Table 12 at **Appendix 3** and Table 6.13 above shows considerable capacity at 2015 of 3,499 sq. m, which increases to 3,684 sq. m by 2020 and over 4,000 sq. m in the longer term by 2030.
- 6.83 The level of capacity identified is more than can be accommodated physically within the district centre of Woodchurch Road, Prenton. Given that the existing draw of trade is from the south and west Birkenhead areas, there is logic to meeting some of the capacity identified by increasing the scope for additional convenience retail floorspace in the Sub Regional Town Centre. Woodchurch Road, Prenton only really provides scope for extension to existing provision or small scale local needs provision. Should a proposal for new food retail floorspace come forward for Birkenhead and that proposal exceeds the assessed capacity for the Sub Regional Centre, it would be reasonable to reapportion to Birkenhead an element of the capacity calculated pro-rata to the market share of stores at Woodchurch Road.

Comparison Retail Goods

- 6.84 The retail capacity assessment indicates that the current comparison retail turnover of Woodchurch Road, Prenton is some £5.7m. Amongst the smaller defined centres in the Borough, this places Woodchurch Road, Prenton just ahead of Hoylake in terms of comparison retail expenditure attracted from the study area. The assessed growth in comparison retail expenditure over the course of the period covered by the Core Strategy (pro-rata to existing market share of Woodchurch Road, Prenton) means that there is limited quantitative capacity for additional comparison retail floorspace in the centre. The retail capacity assessment charts that growth in retail expenditure directed to Woodchurch Road, Prenton will result in capacity for 180 sq. m net of additional floorspace over the period to 2030. This quantum of capacity will provide for one two high-street format units or an extension to existing units.

Local Centres

- 6.85 The retail capacity assessment at **Appendix 3** combines the market shares and local centres, to generate Borough-wide convenience retail capacity figures for local needs floorspace.
- 6.86 Table 12 at **Appendix 3** sets out that the immediate net capacity for additional local needs convenience retail floorspace is just over 3,000 sq. m, rising to nearly 4,000 sq. m by 2025 and some 4,500 sq. m by 2030. Whilst this appears considerable (in comparison for example with the assessed immediate capacity for c. 15,000 sq. m net of additional convenience retail floorspace in Birkenhead), it is important to read these figures in the context of there being a network of 16 local centres. A justifiable approach to apportioning this capacity is further consideration of where there is greatest qualitative need for additional provision. Intervention in ten locations would provide scope for a series of local

needs food stores providing for sustainable patterns of top-up shopping across the Borough.

- 6.87 The performance of local centres in the comparison retail sector allows for a more focussed assessment of retail capacity than in the convenience retail sector. Table 19 at **Appendix 3** here is longer-term capacity for increase in the comparison retail provision of Wallasey Village (nearly 600 sq. m over the period to 2030) and at Grange Road West (some 530 sq. m over the same period). Capacity across other local centres is far less substantial in the convenience retail sector and pegged to just over 1,000 sq. m over the course of the Core Strategy period. Again, this provides the scope for selective intervention to improve comparison retail provision in local communities where there is greatest demonstrable qualitative need.

Borough-wide Capacity 2015 – 2030

Convenience Retail Goods

- 6.88 Considering convenience retail capacity Borough-wide suggests that there is significant immediate capacity for approaching 14,000 sq. m net of additional convenience retail floorspace, based upon a number of existing foodstores (and most notably those in the deep discount retail sector) trading at above expected levels. A significant proportion of this (over 3,000 sq. m) is generated by the market share/performance of convenience retail floorspace in local centres, and should be seen as the basis for encouraging further provision that can meet local needs, on the back of a consideration of qualitative deficiency, evidence of over-trading and where intervention would achieve greatest benefit.
- 6.89 It is only in the Hoylake area that the under-performance of existing convenience retail floorspace negates any capacity for additional provision. Year-on-year growth in convenience retail spending power amongst Wirral residents sees the capacity for additional convenience retail floorspace grow to nearly 20,000 sq. m over the period to 2030.
- 6.90 The convenience retail expenditure surplus identified in Wirral Borough (over £133.0m at 2015) is in stark contrast with the £6.1m shortfall identified at 2012 (£71.2m shortfall when commitments are taken into account). The 2015 capacity figure is net of any convenience retail commitments in the Borough. Whilst there are a number of commitments for limited additional convenience retail floorspace in the Borough, none are for large-format retail foodstores and it is considered that the capacity identified is broadly indicative of the scope for new foodstore provision over the Core Strategy period.
- 6.91 NLP has considered this outcome in detail, and there are a number of reasons why this divergence between the 2012 and 2015 convenience retail capacity findings occurs:

- The spending power of the study area population is assessed to be considerably greater (some £650m at 2015 in the 2015 study compared with approximately £590m at 2015 in the 2012 update). Whilst caution needs to be exercised in comparing these two figures, given a 2013 price base adopted in the 2015 study and a 2010 price base adopted in the 2012 update, both are derived from Experian MMG3 data and it is clear that a major contributory factor is that the 2011 census shows an increase in resident population (at 2015) from a predicted 307,000 in the 2012 update (based upon the 2001 census) and to a predicted 321,000 in this 2015 study;
- The 2012 update includes allowance year-on-year for the more efficient use of existing floorspace, which the 2015 study does not factor-in. Allowance for a more efficient use of floorspace assumes that a proportion of expenditure growth is absorbed by existing floorspace. Whilst this is considered appropriate in the comparison retail sector, as driven by electrical retailers primarily increasingly smaller goods are sold for increasingly higher margins, NLP does not currently advocate the application of floorspace efficiencies in the convenience retail sector;
- The commitments noted at 2012 (Asda, Birkenhead and Morrisons, New Brighton) have now come forward and do not need to be factored-in to the 2015 study as reducing the capacity available;
- The market share of convenience retailers in Wirral Borough (the retention rate) is increased;
- More up-to-date data on the split of convenience and comparison retail floorspace in larger stores is available, which has reduced the benchmark (expected) turnover of a number of larger-format destinations when compared with the 2012 study; and
- The performance of the so-called 'deep discounters' and their outstripping of benchmark (expected) levels.

6.92 NLP considers that its approach is justified and realistic and still remains relatively cautious, given allowances for the economic downturn over the period from 2008 and a continued lack of confidence in some parts of the food retail industry.

6.93 That said, the more optimistic findings for Wirral are reflected across the Borough, with the exception of the Hoylake area, in terms of immediate and longer term capacity.

Comparison Retail Goods

6.94 The 2012 update adopts the same approach as this 2015 study, so far as the comparison retail sector is concerned, in assuming that the recorded turnover of comparison retail floorspace (based upon empirical research) is its benchmark position. The 2012 update then subtracts from this the floorspace of commitments at: Grange Road (Asda) and Hind Street, Birkenhead; Bidston Moss; Tranmere local centre; Telegraph Road, Heswall, and Kings Parade

(Morrisons), New Brighton. The commitments at Grange Road (Asda), and Kings Parade (Morrisons), New Brighton are implemented but others commitments remain extant and it remains a requirement to subtract the floorspace of these commitments from the capacity identified.

- 6.95 Ahead of subtracting from it the assessed turnover of commitments, the 2012 update calculates that surplus comparison retail expenditure at 2020 is in the order of £43 million. This is significantly in excess of the £7.2 million recorded in this study (Table 18 at **Appendix 3**). Capacity is assessed as exceeding by 2025 the £43 million 2020 level recorded in the 2012 update – reaching £48.5 million. The more conservative findings of the NLP assessment are a product of higher percentage deductions by NLP in its retail model to account for growth in e-tailing and the more efficient use of existing floorspace, which are explained in detail in **Appendix 3**.
- 6.96 Whilst it might appear that the conclusions of NLP are more conservative, the year-on-year growth rate in comparison retail spending power adopted by NLP is greater than that adopted in the 2012 update. The reduced capacity figures calculated by NLP are considered justified given the continued rise in the comparison retail sector of on-line businesses (it is important to account for this as growth in this sector does not generate capacity for additional comparison retail floorspace) and the more efficient use of high street and retail park floorspace in part as a response to on-line competition.
- 6.97 The Wirral Borough surplus at 2020 (£7.2 million) provides for approximately 1,500 sq. m net of additional comparison retail floorspace (using a range of average sales density figures appropriate to the centre for which capacity is assessed). This is prior to any commitments being taken account of.
- 6.98 The long term surplus across Wirral (£48.5 million to 2025 and £104.9 million to 2030) provides scope for significant additional comparison retail floorspace across the Borough. Again, using a range of average sales densities appropriate to centres of varying scales within the hierarchy, this generates capacity for over 8,500 sq. m net additional floorspace at 2025 and nearly double this by 2030.
- 6.99 The NLP approach is considered to be more robust given economic trading conditions in the retail sector in the period since 2008, and the continued rise of e-tailers and a trend towards internet spend. The approach adopted by NLP is consistent across the Borough and hence the capacity identified across Wirral is less than that set out in the 2012 update prior to it taking account of commitments.

7.0 **Assessment of Commercial Leisure Provision**

Leisure Trends

- 7.1 The demand for commercial leisure facilities has increased significantly during the last 25 years. The growth in the commercial leisure sector was particularly strong during the late 1980s and again in the mid-1990s. Average household expenditure on leisure services increased in real terms by 93% between 1984 and 1995 (source: Family Expenditure Survey), and by a further 48% between 1995 and 2005. The sector has experienced more limited growth since 2005. Whilst new destination leisure attractions have entered the market place with success (Eden Project ranks 15th in the most visited attractions in England⁹) and country parks, heritage destinations and cultural attractions have outperformed the leisure market in the last decade, commercial leisure attractions have fared less well generally.
- 7.2 Many analysts consider that the commercial leisure market has reached saturation in some sub-sectors, such as bingo, large format multiplex cinemas and tenpin bowling. The economic downturn since 2008 has curbed further growth in leisure spending and this sector is an early casualty of reduced disposable income, albeit the concept of the 'staycation' has delivered positive repercussions for the domestic commercial leisure industry. Visit England notes that attendance at leisure/theme parks stagnated over the period 2005-2013, with the sector considered to be in decline¹⁰.
- 7.3 The mid-1990s saw the expansion of major leisure parks which are generally anchored by a large multiplex cinema and offer other facilities such as ten-pin bowling, bingo, nightclubs, health and fitness clubs, themed destination restaurants, pub/restaurants, children's nurseries and budget hotels. Commercial leisure facilities have typically been located on the edge of town centres or in out-of-centre locations, with good road access. Many leisure uses have also emerged as part of or adjacent to retail warehouse parks. The Croft Retail and Leisure Park, Bromborough on the Wirral is an example of this, including originally cinema, bowling alley and ancillary restaurants. The position at 2015 is that Bromborough Bowl now operates from premises at Bassendale Road (to the south of the Croft Retail and Leisure Park) with the leisure box at The Croft reconfigured to accommodate an upgraded but smaller Odeon cinema and a greater proportion of restaurant floorspace.
- 7.4 The cinema market remains an important sector as this is often an anchor leisure use and provides footfall for linked-trips other uses. Operators such as City Screen, Mainline Pictures, Reel Cinemas and The Light have opened new cinemas or taken over small cinemas in recent years. Premises operated by The Light cinemas are moving away from the standard cinema formats

⁹ Visit England – Most visited paid attractions 2013

¹⁰ Visit England – Visitor Attraction Trends in England 2013 (does not include data for Merlin Entertainments)

followed by Odeon and Vue to try and create more of a 'cultural' centre for cinemagoers including a bar/restaurant space and more intimate environment. There is a Light cinema at Marine Point, New Brighton in Wirral Borough.

- 7.5 Digital projection has driven a trend towards development of cinemas with fewer screens, and town centre locations are back in vogue. Town centre cinemas tend to occupy a smaller footprint and are typically developed alongside other commercial businesses, including cafés, bars and restaurants. Again, the Light cinema in New Brighton is an example of this trend.
- 7.6 In November 2012 Cineworld acquired the arthouse cinema chain Picturehouse, which at the time operated from 21 locations. The acquisition of Picturehouse extended the Cineworld Group portfolio to over 120 venues. Cineworld has confirmed that it is on track to open a further 25 locations by the end of 2017 with a new picture house opening in Glasgow Silverburn in June 2015 and scheduled openings in Fareham (summer 2015) and Ely, Loughborough and Newport (early 2016). In 2019, a Cineworld cinema is due to open as part of the Bridge Street quarter regeneration scheme in Warrington. In January 2014 Cineworld secured expansion internationally, in Eastern Europe and Israel, when it purchased 100 multiplex cinemas from the Cinema City International (CCI) portfolio. 2015 press coverage charts its successes in the Czech Republic and Romania.
- 7.7 Odeon is also continuing investment to improve and expand its estate, which has recently included a new food and drink partnership, with Costa Coffee opening outlets in cinema foyers. Cineworld has introduced Starbucks outlets at a number of sites. Vue has also identified further opportunities for multiplex cinemas in the UK, with the intention to explore new acquisition opportunities.
- 7.8 Although the private health and fitness market has remained strong, it is the no-contract, budget operators such as easyGym and Pure Gym (which merged with The Gym Group in 2014 and acquired the LA Fitness business in May 2015) that are currently seeking premises across the UK and continue to grow rapidly, although none of these fascias are operating in Wirral. Fitness First, DW Fitness, Sports Direct (which acquired 30 LA Fitness branded gyms in June 2014) and Total Fitness operate out of centre gym facilities in Wirral. The economic downturn and squeeze on disposable income has had an impact on established multiple operators, most notably Fitness First, which was recently forced to close a number of outlets as a result of falling membership revenues.
- 7.9 Since the late 1990s the high street has seen a significant increase in the number of cafés, coffee shops and sandwich emporia. This includes the Cafe Nero, Costa Coffee and Starbucks coffee shop chains and sandwich providers Eat, Pret a Manger and Subway, alongside a growth in high-end independent retailers. A 2012 report predicts that increased competition from brands such as Harris and Hoole and Greggs Moment would lead to a 25% growth in coffee shops over the next five years. Tesco entering the takeaway market with its Tesco Express Food to Go chain will provide greater competition in this sector.

- 7.10 A trend for 'posh' fast food, started by the likes of Gourmet Burger Kitchen, has extended into the independent sector and themed venues (such as 'street food' outlets) and is delivering new vibrancy to some high streets, but may be short-lived. In fact, there is a trend for such premises to be described as 'pop-up' restaurants, and many may well be so as operators take advantage of a more flexible Government policy towards town centre uses as temporary changes of uses (for up to two years) are sanctioned through permitted development rights.

Commercial Leisure – Wirral

- 7.11 NLP has completed a desk-based study of the commercial leisure uses in Wirral, setting this in context with provision in locations outside of the Borough that has the potential to divert expenditure away from facilities in Wirral.
- 7.12 The NLP assessment is informed by questions in the 2015 household survey relating to leisure habits and patterns. The findings are summarised below and the full results set out at **Appendix 2**.

Catchment Potential

- 7.13 Commercial leisure facilities outside of 'destination' attractions attract the majority of their trade from residents living within 20 minutes' travel time. Large leisure facilities which typically include an offer such as multiplex cinema, ten-pin bowling, ice rink and family entertainment centre tend to be developed as large out-of-centre leisure parks as they require a large catchment population. That said, there is a marked trend away from out-of-centre leisure facilities with cinema-led mixed use developments returning to town centres on the back of advances in digital screening technology meaning that a greater number of smaller cinemas can be operated efficiently.
- 7.14 The 2015 population of Wirral is estimated at some 320,000. The catchment area for facilities in the Borough is likely to extend beyond its boundary, into Cheshire West and Chester, and leisure facilities in neighbouring authority areas will also draw residents of Wirral out of the borough for leisure activity. The fact that Wirral is a peninsula will lead to a more than typical containment of leisure spending, and there is every reason to expect that patterns of retention in the commercial leisure sector will reflect those in the convenience and comparison retail sectors. That said, Liverpool city centre is within a 15 minute drive from Birkenhead and Cheshire Oaks Designer Outlet and the surrounding leisure facilities (including Vue Cinema and the Blue Planet Aquarium) and Chester city centre are located within easy reach of the south part of the Borough. Although not figuring in the household survey results as a primary destination for leisure activities, the Trafford Centre is within an hour's drive from most settlements in Wirral and is likely to have some draw as families link trips between its leisure facilities and retail offer befitting a regional shopping destination. The regional centres of Liverpool particularly and also Manchester offer accessible extensive leisure opportunities and will draw people out of Wirral to use such facilities.

Cinemas and Theatres

- 7.15 Within the Wirral Borough boundary there are currently three multiplex cinemas. The Odeon is located in Bromborough, The Light in New Brighton and Vue at Conway Park, Birkenhead.
- 7.16 Data from the NLP VeNU¹¹ database shows that the Odeon has 7 screens and 1900 seats¹², The Light has 8 screens and 1200 seats² and that Vue has 7 screens and 1,756 seats².
- 7.17 There are other multiplex cinemas within a 20 minute drive of Wirral which include the Odeon IMAX at Liverpool One and further Odeon picture houses at Dunnings Bridge Road, Bootle to the north of the city centre and Allerton Road to the south. The Picture House at Fact cinema is located in Liverpool city centre. There is a Vue cinema a Cheshire Oaks which as of July 2015 includes an IMAX screen. Cineworld operates from Edge Lane and Showcase from a site off the East Lancashire Road, to the east of the city centre. The three-screen Plaza Community Cinema operates at Crosby Road, North.
- 7.18 The Odeon at Liverpool One is the nearest cinema to Wirral with 'D-Box' chairs installed. The chair is designed to move and vibrate using state of the art technology to introduce a new cinema experience. Enhanced cinema experience may well attract residents of Wirral to travel beyond its boundaries to access entertainment facilities.
- 7.19 The results of the telephone household survey indicate that Borough retention of cinema-going is some 84%. The Odeon at The Croft Retail and Leisure Park (over 29% market share) and The Light (just less than 47% market share) are the principal destinations that Wirral residents look to for cinema-going. Other notable destinations are Birkenhead (over 10%), Liverpool (just less than 7%) and Cheshire Oaks (over 8%). Liverpool and Cheshire Oaks account for the majority of the 16% leakage.
- 7.20 Attached at **Appendix 4** is NLP 'CINeSCOPE'¹³ intelligence for the North West region. The North West focus of the CINeSCOPE model maps the location and scale of existing, committed and proposed cinema outlets, and using population density data identifies potential 'hotspots' for future provision. Wirral is not identified as a hotspot, although it has been identified that there is currently no cinema provision in West Wirral.
- 7.21 The conclusions of CINeSCOPE should be viewed in context with potential latent demand. The results of the household surveys that inform this study identify that nearly 50% of Wirral residents do not consider themselves to be cinema-goers. Notable is that it is in the Birkenhead area of the Borough where the least proportion of the population are cinema-goers. Nearly two-thirds of residents in the Hoylake and West Kirby and Moreton areas are cinema-goers,

¹¹ NLP VeNU is a comprehensive database of cinemas and screens

¹² NLP VeNU Database

¹³ NLP CINeSCOPE is a cinema capacity model for UK locations informed by NLP VeNU and demographic data and trends

and it is in this area that the NLP 'CINeSCOPE' model identifies potential for new cinema space. This suggests strongly that any moves by the Council to encourage cinema provision in the Borough should focus upon opportunities in Hoylake and West Kirby centres.

Health and Fitness Clubs

- 7.22 The 2009 and 2012 studies did not identify existing provision or assess demand for health and fitness clubs in Wirral. There are a number of national health and fitness operators based in Wirral, including; Fitness First, DW Sports Fitness, Sports Direct and Total Fitness. De Vere Village (Wirral) and other hotels in the Borough have fitness suites available for public use. These national operators are supplemented by a substantial number of independent health and fitness clubs.
- 7.23 The results of the telephone household survey indicate that residents of Hoylake and West Kirby are most likely to use health and fitness facilities; residents of Birkenhead are least likely to use gym provision. Despite this, some 10% of gym-goers identify Birkenhead facilities as the location of the health and fitness club visited. Other destinations identified by a significant proportion of gym-goers are West Kirby (nearly 15%) and Bromborough/Croft Retail and Leisure Park (over 12%). There is very limited usage of destinations outside of the Borough.
- 7.24 NLP is aware that in recent years the Council has received a number of planning applications proposing new gym facilities and extensions to those that are already in operation. A number of these applications relate to the change of use of redundant B1/B2/B8 uses located on industrial estates. This is consistent with the recent increase in demand for 'crossfit' and boot camp facilities. Despite the demand for standalone gym facilities in Wirral there has been a lack of applications for health and fitness developments coming forward in association with larger mix-used proposals.
- 7.25 In common with cinema provision, it is evident that there is potential latent demand and the east and south of the Borough and potential capacity for additional provision in the north and west given patronage levels in Moreton, Hoylake and West Kirby.

Family Entertainment Centres Including Ten-pin Bowling

- 7.26 There are currently two ten-pin bowling alleys in Wirral: Bromborough Bowl at Bassendale Road; and Riverside Bowl at Marine Promenade (Marine Point), New Brighton.
- 7.27 The 2009 study identified that some 70% of respondents claim not to visit family entertainment centres such as ten pin bowling alleys and skating rinks. For those respondents that did identify with visiting such facilities, New Brighton was identified as the most commonly visited destination. At 2015 the

proportion of Borough residents claiming not to visit a family entertainment centre has increased to nearly 73%. New Brighton still leads the way with a near 50% market share. Bromborough (including the Croft Retail and Leisure Park) picks up a third of the market share. In common with other leisure sectors, there is very limited outflow of expenditure to destinations outside of the Borough albeit Cheshire Oaks is cited by nearly 7% of respondents who visit family entertainment centres.

7.28 The impact of the economic downturn on levels of disposable income and the general industry and leisure-goer shift away from these multi-entertainment venues suggests that any capacity for growth in the family entertainment sector will, if at all, be in the longer term.

7.29 Nationally, commentators have coined the term 'Boutique bowling' for the reinvention of ten-pin bowling delivered alongside 'posh' or 'street' fast food. 'All Star Lanes' and 'Dog Bowl' in Manchester are examples of 'Boutique bowling' facilities. The pairing of these facilities with a food and drink offer orientated towards young adults has given ten-pin bowling a makeover and a much needed twist to begin to re-establishing its image in the leisure market.

Bingo/Casino

7.30 The 2009 study identified four bingo clubs in Wirral, these being an Embassy Bingo and Social Club in Wallasey, a Top Ten Bingo club in Moreton, a Gala Bingo at the Croft Retail and Leisure Park, and a Mecca Bingo at the Europa Centre in Birkenhead. Since publication of the 2009 study, the Top Ten Bingo Club in Moreton has closed. The 2009 study stated that on the basis of the existing provision there was limited qualitative or quantitative demand to support a new Gala or Mecca-type club.

7.31 The 2015 household survey affirms that bingo/casino-going is a niche market, with only 15% of Borough residents engaged in the activity. New Brighton attracts 40% of bingo-goers and Birkenhead receives a near 30% market share.

7.32 Since 2006 the Council has not received any applications for new bingo facilities, extensions or improvements which support the widely held view that there is stagnation in this sector in all but the highest order centres and that bingo halls have not recovered from the dual effects of economic downturn and a ban on smoking indoors in public places/workplaces.

7.33 Following the issuing by Government of casino licences, casino entertainment destinations (typically including bar and restaurant) have become commonplace in larger cities and regional centres, including Liverpool and Manchester. The Government approach to licencing venues has not had a similar impact on lower order centres. This is illustrated by the recent closure of the Grosvenor Casino in New Brighton.

Indoor Play Centres

- 7.34 The 2009 and 2012 studies did not include a section commenting upon provision in Wirral of indoor play centres. This perhaps reflects the limited number of such facilities at the time. In recent years there has been a marked rise in the number of such facilities nationally, which are seen as a key growth area in the commercial leisure sector.
- 7.35 Originally indoor play centres were primarily provided as enticement to chain operator family pub-restaurants but in recent years the independent operator has started to dominate the industry.
- 7.36 In Wirral there are a number of indoor play centres, including in New Brighton 'Bubble's World of Play' at Marine Point and 'The New Palace' / 'Adventure Land' on Marine Promenade. Other facilities include the 'Madhouse' in Bebington and 'Rascals' at Arrowe Park.
- 7.37 In 2015 the Council has received a number of applications for indoor play centres. This is consistent with the national trend which has seen steady and sustained growth in this area of the leisure industry and there is justification to plan for their provision in areas where there is greatest qualitative need.

Other Commercial Leisure Provision

- 7.38 Three-quarters of Borough residents eat out in restaurants and Liverpool and Chester account for a 25% market share. In contrast with other parts of the leisure industry, it is clear that out-of-Borough destinations have a significant appeal in the restaurant market. Within Wirral, Birkenhead attracts a 7% market share and New Brighton and West Kirby market shares around the 10% mark. Residents in the Bromborough and Liscard areas are recorded as being least likely to eat out, but overall it is clear that there is scope for a qualitative improvement of the existing offer to better compete with higher order centres.
- 7.39 Pubs, bars and nightclubs attract just over 50% of Borough residents with Liverpool accounting for a 17% market share. Within Wirral, Heswall, Oxton Village and West Kirby each attract an 8% market share. By its very nature, provision of pubs and bars is distributed widely amongst local communities; clubs tend to be in larger and higher order centres. In common with the restaurant sector, there is good reason to consider further if intervention in the outflow of expenditure can increase the proportion of expenditure retained in the Borough; the successes of a number of areas within the Borough might provide a blueprint for replication.
- 7.40 Liverpool attracts over three-quarters of trips associated with theatre/concert/live music; activities that nearly two-thirds of Borough residents partake in. Uptake is greatest in the west of the Borough, with patronage rates falling to nearer 50% in Birkenhead. It seems unlikely that any intervention could lead to a shift away from the domination of Liverpool in a sector that is the domain of

higher-order centres. The same pattern of market share and conclusion exists in respect of attendance at museums and art galleries.

Summary of Household Survey (Leisure Results)

7.41

Table 7.1 below provides a summary of the household survey results in the leisure sector.

Table 7.1 Summary of the household survey results in the leisure sector

Activity	Market Share (Rank 1)	Market Share (Rank 2)	Market Share (Rank 3)
Restaurants	Liverpool – 19.30%	Heswall – 9.27%	West Kirby – 5.26%
Pubs/Bars/Nightclubs	Liverpool – 12.67%	Heswall – 4.40%	Wallasey Village – 4.03%
Cinema	Marine Point, New Brighton – 22.85%	Croft Retail and Leisure Park – 11.13%	Birkenhead Town Centre – 5.47%
Family Entertainment (ten-pin bowling/Skating Rink)	Marine Point, New Brighton – 11.37%	Croft Retail and Leisure Park – 7.53%	Cheshire Oaks Ellesmere Port – 4.12%
Bingo/Casino	Marine Point, New Brighton – 6.74%	Birkenhead Town Centre – 2.76%	Croft Retail and Leisure Park – 1.49%
Theatres/Concerts/Live Music	Liverpool – 50.93%	Marine Point, New Brighton – 6.08%	Manchester – 2.22%
Museums and Art Galleries	Liverpool – 55.90%	Port Sunlight – 2.47%	Central London – 1.53%
Health and Fitness	West Kirby – 4.07%	Birkenhead Town Centre – 2.60%	Croft Retail and Leisure Park – 2.15%

8.0 **Conclusions**

- 8.1 Wirral Council commissioned Nathaniel Lichfield & Partners (NLP) in 2015 to prepare a borough-wide retail and leisure study update. The study is required to provide a robust evidence base which will inform the preparation of the emerging Core Strategy. It is required to assess the current convenience and comparison retail and leisure offer across Wirral Borough, and quantify the need for new floorspace over the period covered by the forthcoming Core Strategy. It is undertaken having regard to the requirements set out in the National Planning Policy Framework (NPPF) and the Planning Practice Guidance.
- 8.2 This new Study updates the evidence base, replacing the Wirral Borough Strategy for Town Centres, Retail and Commercial Leisure Study of 2009 (the 2009 study) and a 2012 Wirral Retail Study Update (the 2012 update). This new study is informed by new empirical research (a new household survey) undertaken in June 2015.
- 8.3 In total 1,100 households were surveyed across the study area. The study area is post-code sector based and whilst this means that the study area does not follow exactly the administrative boundary of the borough, the extent of coverage is broadly consistent with it.
- 8.4 The study considers the quantitative need for additional retail floorspace, informed by the results of the household telephone survey. This study also draws some qualitative conclusions in context with the findings of the previous research.

Shopping Patterns 2015

- 8.5 The 98.2% retention rate in the convenience retail sector is exceptionally strong and significantly higher than the norm; the norm being where travel to work patterns and geographical proximity to stores in neighbouring administrative areas will typically see up to 25% of convenience retail expenditure (and more in urban conurbations) directed to destinations beyond the administrative area.
- 8.6 The 98.2% retention rate is an increase on the already high retention rate of 95.4% recorded in the 2012 update, and based upon a 2009 survey of shopping patterns.
- 8.7 Whilst the high retention rate of convenience retail expenditure is reflective of Wirral being a peninsula, proximity to Liverpool and cross-Mersey travel-to-work patterns might be expected to generate a higher proportion of expenditure out-flow.
- 8.8 The lack of out-flow to destinations beyond the Wirral administrative area suggests that there is a tendency for convenience retail shopping to be undertaken at destinations local to home.

- 8.9 Over two thirds (68.28%) of the comparison retail expenditure generated by residents of Wirral Borough is retained within it, but Birkenhead and the defined Town and District centres attract little more than half of this (35.66%). Birkenhead town centre attracts the greatest market share of any centre (16.66%) but this is exceeded by the Croft Retail and Leisure Park, which attracts a slightly greater market share (16.93%); a market share which is most likely higher still, given a potential over-recording of expenditure directed to Bromborough Village District Centre.
- 8.10 The retention rate of the Borough in the comparison retail sector shows a reduction, when the findings of the 2015 study (68.28%) are compared with the 2012 update (based upon a 2009 survey of shopping patterns) which recorded a 70.8% market share. The market share of Birkenhead has reduced considerably from nearly 28% to less than 17% and the combined market share of centres in the Borough has fallen from in excess of 43% to under 36%. The market share of out-of-centre destinations in the Borough has increased from about a quarter of all comparison retail expenditure to in excess of 32%.
- 8.11 The proximity of Liverpool city centre to Birkenhead, and Chester and Cheshire Oaks to the southern boundary of Wirral Borough, and the offer carried by these destinations is the reason why a significant proportion of comparison retail expenditure (32%) 'leaks' from the Borough to these destinations.

Retail Capacity Assessment

- 8.12 The retail capacity assessment assumes a constant market share, projecting forward shopping patterns recorded by the 2015 NEMS household survey. The quantitative assessment of the potential capacity for new retail floorspace suggests that there is scope for new convenience retail floorspace in most parts of Wirral with the exception of Hoylake.
- 8.13 In Birkenhead significant comparison capacity is identified for new retail floorspace which provides scope for a sizeable extension of the town centre and/or uplift in the performance of existing retail floorspace. In Liscard, Moreton and Bromborough Village there is capacity to support very small scale intervention which would most likely be satisfied by extensions to existing floorspace or uplift in the performance of existing retail floorspace. There is no meaningful capacity for new comparison retail floorspace identified in other centres.
- 8.14 Tables 7.1 and 7.2 summarise the capacity for additional convenience and comparison retail floorspace for the defined town and district centres in Wirral. Capacity beyond 2020 should be viewed with caution as there is little certainty over long term economic performance and prosperity.

Table 7.1 Convenience capacity by centre

Centre	Convenience Capacity			
	At 2015	By 2020	By 2025	By 2030
Birkenhead	1,630	1,943	2,327	2,725
Heswall	1,873	2,026	2,214	2,409
Liscard	2,319	2,526	2,780	3,043
Moreton	851	1,008	1,201	1,401
West Kirby	1,765	1,879	2,019	2,164
Bromborough Village	270	297	331	366
Hoylake	-	-	-	-
Woodchurch Road, Prenton	3,499	3,684	3,910	4,145

Table 7.2 Comparison capacity by centre

Centre	Comparison Capacity			
	At 2015	By 2020	By 2025	By 2030
Birkenhead	-	762	4,552	8,694
Heswall	-	51	302	576
Liscard	-	179	1,069	2,042
Moreton	-	100	597	1,140
West Kirby	-	43	259	494
Bromborough Village	-	104	623	1,191
Hoylake	-	12	73	140
Woodchurch Road, Prenton	-	16	94	180

Meeting Shopping and Leisure Needs

- 8.15 The NPPF states that local planning authorities should plan to meet in full the need for additional retail, leisure, office and other main town centre uses over the development plan period. When planning for growth in their town centres, LPAs should allocate a range of suitable sites to meet the scale and type of town centre uses needed, including new retail and leisure floorspace. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability.
- 8.16 As set out above, the retail capacity assessment assumes that the market share and role of the town and district centres will remain unchanged in the future. Whilst this study is primarily a quantitative capacity update, it is important to make reference to benefits derived from qualitative improvements in retail and leisure provision. If a proposal for retail or leisure development comes forward and that proposal exceeds the capacity projections, this does not necessarily mean the proposal should be refused planning permission.

Retail capacity is an important consideration in the context of retail trade diversion and retail impact, but it is also important to place this in context with whether a proposed development is consistent with the role, character and catchment area of the town or area it is intended to serve. It is important that such a qualitative consideration sits alongside an assessment of whether a proposal is justified in terms of the NPPF sequential approach and impact tests.

8.17 It is unlikely that the proportion of convenience retail expenditure generated and retained in the Borough will increase, but additional retail floorspace in centres across Wirral could claw-back comparison retail expenditure that is currently directed to locations outside of the Borough.

8.18 The implications of major retail development in centres surrounding Wirral should also be monitored, with consideration given to the effect that such proposals may have on the demand for additional retail floorspace in Wirral.

Retail Assessment Summary

Birkenhead

8.19 Birkenhead is the largest town in the Borough and defined by Policy CS25 in the emerging Core Strategy as a Sub-Regional Centre. Policy CS25 qualifies that Birkenhead town centre includes Grange Road West, Oxton Road, Europa Boulevard, Argyle Street, Market Street and Hamilton Street.

8.20 Birkenhead is of a scale comparable to other nearby sub-regional shopping destinations (Bootle, Southport and St Helens), and it is an important shopping destination locally; particularly in the northern part of Wirral Borough from which Chester and the designer outlet shopping village at Cheshire Oaks are less readily accessible, and despite the proximity of Liverpool.

8.21 There is capacity identified for both convenience and comparison retail floorspace in Birkenhead; significant comparison retail capacity is identified for new retail floorspace the will provide for a sizeable extension of floorspace or uplift to in the performance of existing. The Council should consider encouraging additional comparison retail floorspace which would meet contemporary requirements of high street retail operators, whilst remaining appropriate to the scale of the town.

Town and District Centres

8.22 Policy CS25 of the emerging Core Strategy also defines:

- Heswall, Liscard, Moreton and West Kirby as Town Centres; and
- Bromborough Village, Hoylake and Woodchurch Road, Prenton as District Centres.

8.23 Heswall town centre is located in the south-west of Wirral on the west side of the peninsula. Further north-west on this western side of the Peninsula is West

Kirby town centre; to the north of this is Hoylake district centre. East of Hoylake and in the central north part of the Borough is Moreton town centre and further east still to the north of Birkenhead is Liscard town centre. South-west of Birkenhead town centre is Woodchurch Road (Prenton) district centre and south east of this on the eastern side of the peninsula is Bromborough Village centre.

- 8.24 The town and district centres are of varying scale and character but generally have a range of independent retailers alongside businesses meeting every day shopping needs and providing access to some services.
- 8.25 Based upon the constant market share approach, there is capacity for additional convenience floorspace across a number of centres.
- 8.26 In relation to comparison floorspace, in Liscard, Moreton and Bromborough Village there is capacity to support very small scale intervention which is most likely to be extensions or uplift to the existing stock. There is no meaningful capacity for new comparison retail floorspace identified in other centres.

Leisure Assessment Summary















- 8.27 This retail and leisure study focusses upon quantitative retail capacity, but includes a qualitative assessment of commercial leisure provision.
- 8.28 A review of commercial leisure facilities in Wirral has identified a number of key trends. Most notable and unsurprisingly is the number and attraction of facilities located in the regional centre, Liverpool. However the Croft Retail and Leisure Park and New Brighton are also popular destinations particularly with regard to cinema and family entertainment activities.
- 8.29 Within the Wirral Borough boundary there are currently three multiplex cinemas. The Odeon is located in Bromborough, The Light in New Brighton and Vue at Conway Park, Birkenhead. It is considered that there is no current demand for further cinema provision in Wirral although it is noted that there is currently no commercial cinema in West Wirral.
- 8.30 Bingo hall outlets in Wirral are considered to be limited when compared against the expected offer relative to resident population. That said, since 2006 the Council has not received any applications for new bingo facilities, extensions or improvements which supports a widely held view that there is stagnation in the market and that there is not a pressing qualitative need to enhance bingo hall provision in Wirral.
- 8.31 Overall, there is no immediately obvious shortfall in leisure provision other than the theatre/concert/live music sector. Liverpool attracts over three-quarters of trips associated with these activities; activities that nearly two-thirds of Borough residents partake in. Uptake is greatest in the west of the Borough, with patronage rates falling to nearer 50% in Birkenhead. It seems unlikely that any intervention could lead to a shift away from the domination of Liverpool in a sector that is the domain of higher-order centres. The same pattern of market

share and conclusion exists in respect of attendance at museums and art galleries.



Nathaniel Lichfield
& Partners
Planning. Design. Economics.

Planning
Consultancy
of the Year **2011-2014**
RTPI
· ★ ★ ★ ·

-  Applications & Appeals
-  Climate Change & Sustainability
-  Community Engagement
-  Daylight & Sunlight
-  Economics & Regeneration
-  Environmental Assessment
-  Expert Evidence
-  GIS & Spatial Analytics
-  Graphic Design
-  Heritage
-  Property Economics
-  Site Finding & Land Assembly
-  Strategy & Appraisal
-  Urban Design

Bristol
0117 403 1980

Cardiff
029 2043 5880

Edinburgh
0131 285 0670

Leeds
0113 397 1397

London
020 7837 4477

Manchester
0161 837 6130

Newcastle
0191 261 5685

Thames Valley
0118 334 1920

nlpplanning.com