WIRRAL

	**CABINET** **Monday 18 July 2016** **CORE STRATEGY LOCAL PLAN - WIRRAL RETAIL & LEISURE STUDY UPDATE**

Councillor Phil Davies, Leader of Wirral Council, said:

“Thriving small businesses is one of our 20 Pledges, and is a fundamental part of creating the vibrant and successful economy we all want to see in Wirral. We are making great progress already – the plans for the regeneration of Birkenhead are incredibly exciting, and the developments at New Brighton show us what can be achieved when we aim high.

We also know where our challenges are: we are determined to work with local people, businesses and employers over the coming year to make sure Wirral’s high-streets are prosperous, healthy and thriving.”

REPORT SUMMARY

In 2015 Wirral Council asked its retained retail consultants - Nathaniel Lichfield & Partners (‘NLP’) to prepare a Borough-wide Retail and Leisure Study Update (‘the NLP Retail Study’). The NLP Retail Study updates the evidence base, replacing the existing Strategy for Town Centres, Retail and Commercial Leisure prepared by Roger Tym & Partners and the Wirral Retail Study Update prepared by GVA Grimley.

The Council will use the findings of this report to shape our approach to supporting small businesses and high-streets to succeed. It provides a helpful evidence base on which we can design our plans and interventions, enabling us to target our activity and support on those areas which will make the biggest impact.

The retail study highlights the strength of the New Brighton redevelopment which, along with the Croft Retail Park, is now Wirral’s main commercial leisure destination. The study also highlights retail areas in Wirral with space for expansion, including Birkenhead.

The NLP Retail Study:

- Assesses retail and commercial leisure patterns and expenditure ‘leakage’; quantifies the performance of retail destinations; and provides a comparison with the findings of previous studies; informed by a telephone survey by NEMS market research of 1,100 households split across a series of postcode-based survey zones undertaken in June 2015;

- Assesses the future need, capacity and potential locations for additional retail floor space in the Borough over the period to 2030;

- Considers whether current retail provision is meeting the demands of Wirral residents and whether there is a need to increase competition and/or influence the mix of local provision within the retail sector;

- Advises on potential threats to the future retail health of the Borough and it’s town centres;

The NLP Retail Study utilises the hierarchy of centres set out in Draft Policy CS25 in the emerging Core Strategy Local Plan. The work of the consultants has been supplemented by health checks of the main centres in the Borough undertaken by Council officers during the summer of 2015. A summary of the health check assessments has been included in section 5 of the NLP Retail Study. The NLP Retail Study utilises the same population data used in the 2016 Strategic Housing Market Assessment, also produced for the Council by NLP.

The NLP Retail Study key findings are:

- 98% of convenience expenditure (on food and everyday items) by Wirral residents is undertaken at stores and centres within the Borough;
- The discount supermarkets (Aldi and Lidl) now account for just over a quarter of convenience spending and have grown at the expense of the ‘big 4’ supermarket operators;
- Two-thirds of comparison retail expenditure generated by Wirral residents is retained within the Borough. Birkenhead’s market share of 16.6% has for the first time been exceeded by the Croft Retail and Leisure Park’s market share of 16.9%. Liverpool is the main destination for out of Borough spending;
- New Brighton and the Croft Retail and Leisure Park are the main commercial leisure destinations in the Borough;
- There is capacity for almost 14,000 sq m net of additional convenience floorspace at 2015, which increases to 20,000 sq m net by 2030;
- There is capacity for new convenience floorspace in all centres with the exception of Hoylake;
- There is capacity for approximately 1,500 sq. m net of additional comparison retail floorspace at 2020 rising to 8,500 sq. m net by 2025 and 16,676 sq.m by 2030;
- Significant capacity is identified for new comparison retail floorspace in Birkenhead, while in Liscard, Moreton and Bromborough Village there is capacity to support small scale interventions. There is no significant capacity in the other town or district centres in Wirral over the Core Strategy plan period; and

- There is no immediately obvious shortfall in leisure provision. NLP consider it unlikely that any intervention could lead to a shift away from Liverpool's dominance in the theatre/concert/museum/art gallery sector.

The Wirral 2020 Plan promotes thriving small businesses and to enable them to grow we will work to improve local high streets and our town centre economy. Retail areas are key parts of our local communities and ownership of these areas by businesses and people as well as accessibility, good design and healthy and prosperous environments will be promoted.

The report is a key decision as the findings could affect a large number of wards.

RECOMMENDATIONS

1. That Cabinet recommends to Council that the findings of the NLP Retail Study Update be used to inform the content of the Council's emerging Core Strategy Local Plan and subsequent site-specific Local Plan.

2. That Cabinet recommends to Council that the NLP Retail Study be approved as a material consideration for use by Planning Committee in the determination of planning applications.

SUPPORTING INFORMATION

1.0 REASONS FOR RECOMMENDATIONS

1.1 To approve an up-to-date retail evidence base to inform the preparation of the Council's Core Strategy Local Plan and assist with the consideration of planning applications.

1.2 To comply with the legal and procedural requirements for the preparation and adoption of an up-to-date Core Strategy Local Plan for Wirral, in line with the National Planning Policy Framework (NPPF).

2.0 OTHER OPTIONS CONSIDERED

2.1 Paragraph 23 of 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 period of their Local Plan. When planning for growth in their town centres, local planning authorities 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.

2.2 The NLP Retail study will inform the preparation of the Council's statutory Local Plan for the area. Not preparing an up-to-date Local Plan would mean that the Council would have to continue to rely on the Unitary Development Plan adopted in February 2000. The national presumption in favour of sustainable development would be held to apply where the development plan is absent, silent or relevant policies are out-of-date (NPPF paragraph 14). In the absence of an up-to-date Local Plan, decisions on planning applications will have to be made in the context of the National Planning Policy Framework, with policies in the Unitary Development Plan only carrying weight according to their consistency with the Framework.

2.3 Not preparing an up-to-date Local Plan may also incur financial penalties and the intervention of the Secretary of State.

3.0 BACKGROUND INFORMATION

3.1 In 2015 Wirral Council asked its retained retail consultants - Nathaniel Lichfield & Partners ('NLP') to prepare a Borough-wide Retail and Leisure Study Update ('the NLP Retail Study'). The NLP Retail study updates the evidence base, replacing the 2009 Strategy for Town Centres, Retail and Commercial Leisure ('the 2009 study') prepared by Roger Tym & Partners (which included a household survey) and the 2012 Wirral Retail Study Update ('the 2012 update') prepared by GVA Grimley (which did not include a new household survey). The NLP Retail study:

- Assesses retail and commercial leisure patterns and expenditure 'leakage'; quantifies the performance of retail destinations; and provides a comparison with the findings of previous studies;

- Assesses the future need, capacity and potential locations for additional retail floor space in the Borough over the period to 2030;

- Considers whether current retail provision is meeting the demands of Wirral residents and whether there is a need to increase competition and/or influence the mix of local provision in the retail sector; and

- Advises on the future retail health of the Borough and it's town centres;

3.2 The NLP Retail study utilises the hierarchy of centres set out in Draft Policy CS25 in the emerging Core Strategy Local Plan. The work of the consultants has been supplemented by health checks of the Borough's main centres undertaken by Council officers during summer 2015 (summarised in section 5 of the NLP Retail Study).

4.0 ASSESSMENT OF SHOPPING PATTERNS

4.1 The assessment of shopping patterns in the Borough is informed by new empirical research (a telephone survey by NEMS market research of 1,100 households split across a series of postcode-based survey zones) undertaken in June 2015.

Convenience Shopping Patterns

4.2 The household survey asked residents their primary main food and primary 'top-up' convenience retail shopping destinations (convenience shopping is on food and other everyday items). The two sets of responses were then combined to provide an overall picture of convenience shopping patterns in the study area. The analysis excludes internet/mail order responses and 'don't know'/'don't buy' responses. This is summarised in Table 4.1 of the NLP Retail study which shows the percentage of combined main food and top-up trips to each centre/destination (reproduced below).

Centre	Market Share (%)
Birkenhead	7.53
Heswall	8.72
Liscard	9.55
Moreton	1.97
West Kirby	7.77
Bromborough Village	1.37
Hoylake	0.69
Woodchurch Road, Prenton	8.19
Other 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**

4.3 NLP note that the 98.2% retention rate is an increase on the already high retention rate of 95.4% recorded in the 2012 update (based upon the 2009 household survey). This suggests that the geography of the Borough reinforces the tendency for convenience retail shopping to be undertaken at destinations close to home.

4.4 NLP considers that 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 and Hoylake) are meeting local shopping needs. The household survey results also show that the proportion of convenience retail expenditure retained across the eleven sub-zones that make up the study area is consistently high, indicating that Wirral residents are well provided for in the food retail sector (at least in terms of supermarket provision).

4.5 The results additionally show that the recorded market share of the “big 4” supermarket operators (Asda, Morrison’s, Sainsbury’s and Tesco) has fallen from 68% in 2012 (based on a 2009 survey of shopping patterns) to 57% in 2015, despite the opening of new stores in Birkenhead (Asda) and New Brighton (Morrisons) in the period between the two surveys. By contrast, the market share of the discounters, Aldi and Lidl, has grown from less than 10% in 2012 to just over 26% in 2015, albeit that this will have been boosted by a number of store openings in the intervening period.

Comparison Retail Spending Patterns

4.6 In relation to comparison (non-food) goods the household survey asked residents where they do most of their shopping for six categories of goods; clothing and footwear, electrical appliances, furniture, DIY, health and beauty and recreation (books, CDs and Toys). The shopping patterns across the six categories of goods are then combined to provide an overall picture of shopping patterns which is summarised in Table 4.2 of the NLP Retail Study (reproduced below) The analysis excludes internet/mail order responses and ‘don’t know’/’don’t buy’ responses.

Centre	Market Share (%)
Birkenhead	16.66
Heswall	2.17
Liscard	2.46
Moreton	1.24
West Kirby	1.86
Bromborough Village	3.93
Hoylake	0.46
Woodchurch Road, Prenton	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**

4.7 The survey results indicate that over two thirds (68.28%) of the comparison (non-food) retail expenditure generated by Wirral residents is retained within the Borough. This represents a small reduction on the 70.8% recorded in the 2012 update (based upon a 2009 survey of shopping patterns).

4.8 Compared with the 2012 update (based on the 2009 shopping survey), the market share of Birkenhead Town Centre has reduced considerably from nearly 28% to just under 17% and the combined market share of centres in the Borough has fallen from in excess of 43% to under 36%. By contrast 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%. Significantly, Birkenhead Town Centre's market share of 16.66% is now exceeded by the Croft Retail and Leisure Park, with a market share of 16.93%, a figure which NLP consider could be higher still, due to a potential over-recording of expenditure attributed to Bromborough Village District Centre by respondents to the telephone survey. There is also a significant drop in the market share at Liscard Town Centre, which only attracted a 2.46% market share and the 16 local centres which have a combined market share of just over 6% of Borough comparison retail goods spending.

4.9 In relation to the 31.72% of expenditure which 'leaks' out of the Borough, Liverpool remains the main destination accounting for 18.11% of this 'leakage' (up from 14.2% in 2012), with Cheshire Oaks and Chester accounting for 4.06% and 4.74% of expenditure respectively. Whilst the growth in Liverpool's market share is reflective of the increased offer in the city following the opening of Liverpool One, the increase over the six year period to 2015 is less pronounced than the growth in performance at out-of-centre retail destinations within Wirral.

Leisure

4.10 The household survey also included questions asking respondents where they went most frequently to a range of different commercial leisure uses. Table 7.1 in the report (reproduced below) summarises 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 (inc. ten-pin bowling)	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%

4.11 The results show the domination of New Brighton and the Croft Retail and Leisure Park as leisure destinations in the Borough and Liverpool outside the Borough for concerts and museums/art galleries. It should be noted that the telephone survey took place before the closure of the Grosvenor Casino in New Brighton in July 2015.

4.12 NLP concludes that there is no immediately obvious shortfall in leisure provision in the Borough. It seems unlikely that any intervention could lead to a shift away from Liverpool's dominance in the theatre/concert/museum/art gallery sector.

5.0 RETAIL CAPACITY ASSESSMENT

5.1 An important element of the NLP Retail Study is quantifying the need for new convenience and comparison retail floorspace in the Borough. The convenience and comparison market shares recorded by the NEMS household survey are applied to the most up-to-date population and expenditure data to assess current retail capacity at 2015 and to project forward potential capacity for additional retail floorspace to 2020, 2025 and 2030. Capacity is identified both at a Borough-wide level and disaggregated down to the main town and district centres in the Borough. NLP indicate that identified capacity beyond 2020 should however, be viewed with some caution as there is little certainty over long term economic performance and prosperity.

5.2 A key change in the baseline position cited by NLP is that the spending power of the study area population is assessed to be considerably greater than predicted in the 2012 update - (some £650m at 2015 in the 2015 study compared with approximately £590m at 2015 in the 2012 update). A major contributory factor for this difference is that the 2011 Census shows a significant increase in the resident population (at 2015) from a predicted 307,000 in the 2012 update (based upon the 2001 Census) to a predicted 321,000 in the NLP Retail study. The NLP Retail study utilises the same population data used in the 2016 Strategic Housing Market Assessment, also produced for the Council by NLP.

5.3 Proposals that come forward in the future will reduce the overall capacity for new retail floorspace. At the time of undertaking the NLP Retail Study, there were no commitments for significant retail floorspace in the Borough, other than Wirral Waters. The latter has a 23 year outline planning permission for a level of economic and housing growth to meet a strategic or potentially regional need, with 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, NLP are of the view that Wirral Waters cannot sensibly be factored into a conventional district-level retail capacity assessment.

Borough-wide Convenience Retail Goods Capacity

5.4 The approach to identifying convenience retail capacity compares the survey-derived turnover of convenience retail destinations with expected (benchmark) turnover levels, based either on a company average (for named foodstores) or typical sales densities for other floorspace (expressed as turnover/sq. m). Potential capacity for additional floorspace is identified where the survey-derived turnover exceeds the benchmark turnover level, with the difference between the two representing expenditure which could theoretically be diverted to support new floorspace without exposing an existing store to adverse impacts in terms of trading below the company or benchmark average turnovers.

5.5 Based the above calculations the NLP Retail Study therefore identifies a Borough-wide expenditure surplus of £133m in the convenience sector at 2015. This translates into capacity for almost 14,000 sq. m net of additional convenience retail floorspace at 2015. Year-on-year growth in convenience retail spending power amongst Wirral residents could see the capacity for additional convenience retail floorspace grow to nearly 20,000 sq. m over the period to 2030. This surplus is in stark contrast with the 2012 study which considered that there was no quantitative need to plan for new convenience provision across the Borough in the Core Strategy Plan period to 2030. NLP consider that the reasons for the divergence between the two studies is down to the significant uplift in the spending power of the population discussed in 5.2 above, the higher rate of retention of spend in the Borough identified from the household survey and other more up-to-date data on the performance of the retailers as well as some differences in the inputs used.

Borough-wide Comparison Retail Goods Capacity

5.6 The approach adopted in the calculation of comparison capacity is broadly consistent with the approach in the convenience sector. The main difference is that comparison floorspace in the Borough is assumed to be trading at the survey-derived turnover and there is no surplus in spending to support additional floorspace in the base year. This is because it is not feasible to ‘benchmark’ the performance of comparison floorspace against company average turnovers in the same way as the convenience sector, as the number of different national chains and independent retailers in the comparison sector is much higher. As such, it is year-on-year growth in retail spending that generates capacity over the period to 2030. Allowances are also made for the more efficient use of existing floorspace by retailers and the impact of internet shopping.

5.7 On the basis of the calculations the NLP Retail Study identifies a Borough-wide expenditure surplus at 2020 of £7.2 million, equivalent to approximately 1,500 sq. m net of additional comparison retail floorspace. The long term surplus across Wirral (£48.5 million to 2025 and £104.9 million to 2030) could see the capacity rise to 8,500 sq. m net by 2025 and 16,676 sq. m by 2030. By contrast the 2012 study calculated an expenditure surplus of £43m at 2020. The differences are down to higher percentage deductions to account for growth in internet shopping (which does not generate capacity for additional retail floorspace) and the more efficient use of existing floorspace.

Capacity by Centre

5.8 In addition to the Borough-wide capacity calculations, the NLP Retail study provides disaggregated assessments for Birkenhead, Heswall, Liscard, Moreton, West Kirby, Bromborough Village, Hoylake and Woodchurch Road, Prenton. Capacity for other local centres in the Borough is given as a single figure on the expectation that planning for growth in existing (or for new) local centres is best achieved through a consideration of: qualitative deficiency, evidence of over-trading and where intervention would achieve greatest benefit. 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 which reflects the varying scales and format of the retailing likely to be attracted to each centre.

5.9 Table 7.1 in the NLP Retail Study (reproduced below) summarises the position in relation to convenience floorspace capacity by centre:

Centre	Convenience Capacity (sq m net)			
	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 Rd, Prenton	3,499	3,684	3,910	4,145
Local Centres	3,156	3,586	4,113	4,660

5.10 The assessment shows there is potential capacity for new convenience retail floorspace in all centres with the exception of Hoylake, where it was found that under-performance of existing convenience retail floorspace negates any capacity for additional provision. In relation to the local centres as a whole, the capacity for convenience floorspace over the plan period appears considerable; but this is in the context of there being a network of 16 local centres. Intervention in ten locations, for example, would provide scope for a series of food stores to serve local needs and promote sustainable patterns of top-up shopping across the Borough.

5.11 Table 7.2 of the report (reproduced below) summarises the position in relation to comparison floorspace capacity by centre. As it is assumed that comparison floorspace in the Borough is trading at the survey-derived turnover and there is no surplus in spending to support additional floorspace in the base year (paragraph 5.6 of this report refers), capacity for additional floorspace is only identified from 2020 onwards.

Centre	Comparison Capacity (sq m net)			
	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 Rd, Prenton	-	16	94	180
Wallasey Village	-	51	307	587
Grange Road West	-	47	280	534
Other local centres	-	96	575	1098

5.12 Significant capacity is identified for new comparison retail floorspace in Birkenhead, 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 small scale interventions. There is no significant capacity for new comparison retail floorspace identified in the other town or district centres over the Core Strategy plan period. The only local centres where significant comparison capacity was identified are Wallasey Village and Grange Road West with capacity across all the other local centres limited to 1,000 sq. m over the Core Strategy period. NLP suggest this level of capacity provides scope for selective intervention to improve comparison retail provision in local communities where there is greatest demonstrable qualitative need.

6.0 PLANNING IMPLICATIONS

6.1 Paragraph 23 of 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.

Convenience Sector

6.2 The household survey results show that the proportion of convenience retail expenditure retained across the eleven sub-zones that make up the study area is consistently high, indicating that Wirral residents are well provided for in the food retail sector (at least in terms of supermarket provision). In relation to comparison retailing, the findings show a noticeable decline in the recorded market share of Birkenhead and Liscard, while the market shares of out-of-centre destinations and particularly the Croft Retail and Leisure Park are increasing along with other destinations outside the Borough.

6.3 Significant potential surplus convenience expenditure is identified in the NLP Retail Study, which is translated into capacity for new convenience floorspace, both now and throughout the Plan period. However, there are potential additional considerations that need to be taken into account before new floorspace can be justified. For example, where an existing supermarket in a town centre location is assessed as trading in excess of its company average turnover or benchmark position, the surplus expenditure should not automatically be seen as supporting capacity for additional convenience floorspace (especially where this would be outside the centre). A higher than company average store turnover could be argued to be an acceptable boost to the vitality and viability and turnover of the town centre as a whole, especially where other convenience stores are trading below benchmark levels. These other stores could absorb some of this surplus expenditure if a change in local shopping habits resulted in a transfer of market share from one operator to another. The case for additional floorspace would, however, be strengthened where there was qualitative evidence that the store trading above its benchmark position is also ‘overtrading’ - where a store becomes so busy it results in overcrowding and congestion in the store, at check-outs and in the car park, such that its performance is affected as customers decide to shop elsewhere.

6.4 An additional consideration is that site availability for additional convenience floorspace is limited in a number of centres. Aside from Birkenhead, the health check assessments summarised in section 5 of the NLP Retail Study identified some opportunities in Liscard, and Prenton (Woodchurch Road), but in Bromborough Village, Heswall, Hoylake, Moreton, and West Kirby there are no sites currently available for redevelopment and no obvious room available for expansion. Redevelopment of existing sites/premises – should they be deemed surplus to requirements – would therefore be necessary in these centres, requiring existing uses to be re-provided elsewhere if needed. Any sites identified, or which come forward, would also need to be identified in a future site-specific Local Plan.

Comparison Sector

6.5 In terms of comparison floorspace, significant capacity in Birkenhead Town Centre for new retail floorspace provides scope for a sizeable extension of the town centre and/or uplift in the performance of existing retail floorspace. NLP consider that the reinvigoration of town centre floorspace in Birkenhead 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. Local shoppers will only be attracted back to town centre destinations if their overall attractiveness is perceived as on a par with, or better than, other options available within the Borough and the wider sub-region. This provides strong support for the current work being undertaken to bring additional development into Birkenhead Town Centre. Elsewhere, the capacity for comparison floorspace is more limited, which NLP considered could be addressed by extensions to existing floorspace and/or uplift in the performance of existing retail floorspace.

6.6 NLP note that while their study is primarily a quantitative capacity update, it is important to make reference to the wider benefits that can be derived from qualitative improvements in retail and leisure provision. If a proposal for retail or leisure development comes forward in excess of capacity projections, this does not necessarily mean the proposal should be refused planning permission. Consideration would need to be given to whether a proposed development is consistent with the role, character and catchment area of the town or area it is intended to serve. NLP consider that it is important that such a qualitative consideration should sit alongside any assessment of whether a proposal is justified in terms of the NPPF sequential approach to site selection and impact tests.

6.7 There is nothing in the findings of the NLP Retail Study to suggest that the hierarchy of centres in the Borough proposed in Draft Core Strategy Policy CS25 or the thresholds for the preparation of impact assessments proposed by NLP in 2014 need amending. The thresholds for new floorspace that would trigger a retail impact assessment at local level were incorporated into an amended draft Core Strategy Policy CS28 and made subject to public consultation alongside amended Policies CS25, CS26 and CS29 between December 2014 and February 2015. It is therefore proposed that these be carried forward into the final Core Strategy Local Plan without any further alteration.

7.0 FINANCIAL IMPLICATIONS

7.1 NLP have undertaken this study under the terms of their appointment as the Council's retained retail consultants in 2013 for a period of five years, following a tender process. The fee was met from the budget for Regeneration and Planning held for the study.

8.0 LEGAL IMPLICATIONS

8.1 The NLP Retail Study will inform the consideration of future planning applications and forms part of the evidence base for the Core Strategy Local Plan, which must be prepared in line with a process set out in national legislation and can only be adopted by the Council if it is found to be legally compliant and 'sound' by a Planning Inspector appointed by the Secretary of State.

9.0 RESOURCE IMPLICATIONS: STAFFING, ICT AND ASSETS

9.1 The management of the retained retail consultancy is undertaken by the Council's Forward Planning team.

10.0 RELEVANT RISKS

10.1 A failure to comply with the requirements of national policy can be fatal to the legal compliance and soundness of the Core Strategy.

10.2 Failure to have a Local Plan in place by March 2017 could lead to intervention by the Secretary of State under new powers introduced by the Housing and Planning Act 2016, including potential financial penalties, including the withdrawal of some or all, of the Council's annual award of New Homes Bonus.

11.0 CONSULTATION/ENGAGEMENT

11.1 Consultation on the emerging Core Strategy Local Plan and the associated evidence base (including the NLP Retail study) will be undertaken in line with the Council's statutory Statement of Community Involvement approved in 10 March 2014. Amended draft Core Strategy Policies CS25, CS26, CS28 and CS29 were subject to public consultation between December 2014 and February 2015.

12.0 EQUALITIES IMPLICATIONS

12.1 The emerging Core Strategy Local Plan has been subject to ongoing Equality Impact Assessment.

12.2 Results of previous Equality Impact Assessments prepared at each stage in the preparation of the Core Strategy can be viewed at http://www.wirral.gov.uk/planning-and-building/local-plans-and-planning-policy/local-plans/core-strategy-local-plan-0

12.3 A revised Equality Impact Assessment will be presented alongside the proposals to be included in the final Core Strategy Local Plan.

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APPENDICES

The following appendices are available in the Council's Document Library which can be accessed **Here**

Appendix 1

Wirral Retail and Leisure Study Update (Main Report)

Appendix 2

Wirral Retail and Leisure Study Update (Appendices)

REFERENCE MATERIAL

The 2009 Strategy for Town Centres, Retail and Commercial Leisure can be viewed here:

http://democracy.wirral.gov.uk/ecSDDisplay.aspx?NAME=SD416&ID=416&RPID=194919&sch=doc&cat=12848&path=12848

The 2012 Retail Study update can be viewed here:
http://democracy.wirral.gov.uk/ecSDDisplay.aspx?NAME=SD826&ID=826&RPID=1000281489&sch=doc&cat=13213&path=12848%2c13202%2c13213

Consultation on Further Proposed Modifications to the Core Strategy (December 2014) can be viewed here:

http://www.wirral.gov.uk/planning-and-building/local-plans-and-planning-policy/local-plans/core-strategy-local-plan/further

Core Strategy for Wirral, Proposed Submission Draft (December 2012) can be viewed at: http://www.wirral.gov.uk/my-services/environment-and-planning/planning/local-development-framework/core-strategy-development-plan

Additional background information relating to the earlier stages in the preparation of the Core Strategy Local Plan can be viewed on the Council's website at http://www.wirral.gov.uk/planning-and-building/local-plans-and-planning-policy/local-plans/core-strategy-local-plan

SUBJECT HISTORY (last 3 years)

Council Meeting	**Date**
Delegated Decision - Local Development Framework – Report of Consultation on the Proposed Submission Draft Core Strategy	20 June 2013
Delegated Decision – Local Development Framework for Wirral – Core Strategy Local Plan – Consultation on modifications to policies for Gypsies and Travellers and Policies for Town Centres.	25 November 2014