

# Sefton Borough Council

## Retail Strategy Review 2021

### Final Report

March 2021



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## 1.0 Introduction

### Instruction and Purpose

- 1.1 Nexus Planning has been instructed by Sefton Borough Council (hereafter referred to as 'the Council') to undertake a new Borough-wide Retail Strategy Review ('the RSR'). The primary focus of the RSR is to establish the current position in respect of the need for additional retail facilities in Sefton Borough, and to consider the vitality and viability of the Borough's principal centres<sup>1</sup>.
- 1.2 This report replaces the previous Sefton Retail Strategy Review of October 2015 ('the 2015 RSR'). The 2015 RSR was undertaken by WYG Planning to inform the then emerging Local Plan for Sefton<sup>2</sup> and to assist in the determination of planning application for retail and other main town centre uses. The Council considers it necessary to undertake a new RSR due to the time that has now elapsed since the publication of the previous report, and as a consequence of ongoing developer interest in the retail sector in the Borough.
- 1.3 The Council is not currently preparing a new development plan and it is therefore envisaged that the primary purpose of this RSR will be to assist with the determination of planning applications and to help the Council consider future strategies to support vital and viable town centres.
- 1.4 The research which underpins this report has been undertaken during a period when retail facilities and town centres have been impacted by the effects of the Covid-19 pandemic and by associated restrictions on trading. Whilst the findings of the Study are informed by these impacts, it is important to note that there is some expectation that medical and healthcare advances will allow a return to greater normality during 2021, and the vitality and viability of the Borough's centres should therefore be the subject of regular review going forward.
- 1.5 This RSR is underpinned by new empirical evidence in the form of a new household shopper survey, and our site visits to survey and assess the health of the principal centres. The household survey was

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<sup>1</sup> These being Bootle and Southport town centres and the district centres of Crosby, Formby, Maghull and Waterloo.

<sup>2</sup> Adopted in April 2017.

undertaken by NEMS Market Research in September 2020 and covers eight separate zones, which are collectively considered representative of the principal catchment area for retail facilities within Sefton Borough. The zones are consistent with those utilised in the previous 2015 RSR in order to allow comparison of shopping patterns over time.

- 1.6 A plan of the Study Area is provided at Appendix I, and the tabulated household survey results are provided at Appendix II. The Study Area includes parts of neighbouring authority areas of Liverpool, Knowsley and West Lancashire, where residents sometimes look to facilities in Sefton to meet at least some of their retail and leisure needs.

### **Structure of Report**

- 1.7 Our report firstly provides an overview of prevailing retail and leisure trends, before then going on to consider the planning policy context for the Study. We then summarise the key findings of the new household shopper survey, before considering the vitality and viability of defined centres within Sefton Borough. The remainder of the report is focussed around our assessment of retail needs.

- 1.8 Accordingly, our report is structured as follows:

- Section 2 identifies current retail and leisure trends of relevance;
- Section 3 provides an overview of the planning policy context;
- Section 4 summarises the findings of the household survey;
- Section 5 summarises our assessment of the vitality and viability of the six principal centres;
- Section 6 provides an overview of forecast changes in Study Area population and expenditure;
- Section 7 sets out an updated assessment of retail needs; and
- Section 8 provides a summary of our key findings and conclusions.

## 2.0 Current and Emerging Retail Trends

- 2.1 In order to provide a context for this Study and help identify the sectors that are more likely to be the subject of additional development proposals, we provide an overview of current retail and leisure trends below. In reading the below review, it should be noted that the retail and leisure sectors are dynamic and, whilst online shopping has impacted on the retail sector, new retailers and new formats continue to evolve to meet shoppers' needs.
- 2.2 The below commentary should therefore be taken as a 'snapshot' in respect of current market conditions; it will be necessary to judge future development proposals for main town centre uses with reference to the prevailing conditions at the time of a proposal's determination. This is particularly the case given the current commercial circumstances arising from the Covid-19 pandemic, and the impact of the lockdown measures on our high streets and operators (both local and nationally). We reflect on this in more detail below.

### **The Current State of the UK Economy**

- 2.3 The UK economy has experienced a significant shock over the past 12 months as a result of the Covid-19 pandemic and subsequent restrictions on movement and behaviour which have sought to mitigate its impact. This uncertain background has caused business investment and expenditure to decline. Household spending fell by over 20% quarter-on-quarter in the second quarter of 2020 following the imposition of national lockdown measures. This is the largest quarterly contraction on record. Retail sales volumes also suffered double-digit falls in April 2020 as all but essential stores closed during the height of the lockdown.
- 2.4 As a result of the gradual reopening of businesses over summer 2020, the economy returned to growth, with this gathering momentum as a greater number of sectors reopened, including hospitality and leisure services followed by the full reopening of schools. A more pronounced resurgence in the number of cases of Covid-19 resulted in the Government reinstating a nationwide lockdown in early 2021, and it looks likely that social distancing measures will remain in place well into 2021.
- 2.5 In October 2020, Experian published its Retail Planner Briefing Note 18 ('ERPBN18'), which provides comprehensive and up-to-date information on retail developments and short, medium and long term forecasts for retail planning decisions.

- 2.6 ERPBN18 sets out Experian's best estimate of the retail sector and future changes in expenditure at the time of its publication. Experian anticipates that the post-Covid-19 recovery will be subdued over the coming months and that the economy will not recover to pre-Covid levels until at least 2022. Due to the unprecedented nature of the global pandemic, there is great uncertainty over the scale and duration of the outbreak and the resulting economic consequences. An orderly transition and adjustment to a new trading relationship resulting from Brexit is also assumed, and any uncertainty arising from this is likely to further weigh on the economy.
- 2.7 Although the medium term outlook for GDP will be shaped by the course of the pandemic, the long term outlook for GDP remains unchanged, with growth expected to remain below historic averages due to slower population rises and productivity.
- 2.8 The overall retail sales are projected to be volatile in the near term, but growth is less impacted over the medium and longer terms. The outlook for special forms of trading (i.e. internet sales, mail order) has been revised upwards.
- 2.9 The prospects for retail floorspace has been revised down in line with weaker projections for spending and stronger projections for internet sales.
- 2.10 In terms of inflation, Office for National Statistics data<sup>3</sup> indicates that the rate of inflation (as measured by the consumer price index) increased from 0.5% at June 2016 to a high of 3.1% at November 2017, before reducing to 0.6% at December 2020. Increases in the cost of living in recent years have been problematic for the retail sector, as inflation has been principally driven by increasing fuel prices (affecting the cost of electricity, gas and petrol), meaning that consumers have a lesser amount to spend on the high street. Retail has been an industry under significant stress, as many retailers find themselves squeezed between rising costs and the increasing volume of sales over the internet.
- 2.11 In terms of the grocery market, Kantar<sup>4</sup> reports that grocery inflation stands at 1.4% for the 12-week period ending 29 November 2020. The increase in prices is perhaps reflective of the limited opportunities to drink in pubs and restaurants, and a consequent increase in take-home food and drink sales due to the national lockdown announced in early November 2020.

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<sup>3</sup> ONS 'Consumer price inflation tables' dataset, January 2021

<sup>4</sup> Article headlined 'UK grocery sales spike with early Christmas cheer', Kantar, 8 December 2020

- 2.12 Against this backdrop, the long-term impacts of Covid-19 on the wider economy remain to be seen. However, after a record contraction in Q2 of 2020 followed by a record expansion of 16% in Q3, economic growth and activity declined in Q4 of 2020 as a result of the lockdown measures imposed in November 2020 and around the Christmas period. By September 2020, GDP was still down 8.2% compared with February of the same year.
- 2.13 However, as may be expected, ONS<sup>5</sup> has reported that retailers which predominantly rely on customers visiting their stores recorded a big drop after they were ordered to close their doors. Dispensing chemists sold consistently more since the pandemic began than they did before. Their sales increased strongly in March 2020, and continued to grow in June even after restrictions were eased and other non-essential stores were allowed to reopen. Non-specialised foodstores, which include supermarkets, also traded consistently above their pre-pandemic levels. However, for furniture retailers, customers returned in the summer with trade returning to pre-pandemic levels and growing further, boosted by people still spending more time at home than they used to.
- 2.14 In terms of online retailing, ONS has reported '**...online sales reaching higher than usual levels over the course of the pandemic**'. Although these levels dropped off after shops reopened in June, the proportion of online retailing began to increase in October. It can be assumed the subsequent lockdown from November 2020 will have resulted in a continued increase in online expenditure.

#### **Available Expenditure and the Impact of the Internet**

- 2.15 Experian forecasts fairly turbulent growth in per capita convenience and comparison goods expenditure over the short term. Experian projects that per capita expenditure growth in the convenience goods sector will increase substantially to 8.4% at 2020 (from -0.9% at 2019), with this growth largely attributed to consumers spending more on such goods as a result of lockdown measures. Experian projects a 6.2% decrease in per capita expenditure growth in 2021, with very limited forecast growth thereafter.
- 2.16 As the below Table 2.1 indicates, forecast increases in comparison goods spending are more optimistic following a substantial decrease of 8.5% in 2020, but it is evident that per capita comparison goods expenditure increases going forward will be below the level apparent at the turn of the millennium.

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<sup>5</sup> ONS analysis titled 'The impact of the coronavirus so far: the industries that struggled or recovered', published on [www.ons.gov.uk](http://www.ons.gov.uk) on 9 December 2020



Experian identifies that per capita comparison goods expenditure growth dropped from 5.4% at 2017 to 3.4% at 2018, and forecasts that it will remain between 2.9% to 3.0% per annum in the medium to long term. The exception to this is the decrease noted above in 2020, which is largely a result of lockdown measures closing all but essential stores, and an anticipated growth of 6.5% in per capita expenditure in 2021 under the expectation that lockdown measures will be gradually eased and expenditure will pick up.

**Table 2.1: Experian’s Identified and Forecast Convenience and Comparison Goods Per Capita Expenditure Growth**

Volume Growth Per Head (%)	2016	2017	2018	2019	2020	2021	2022	2023-27	2028-40
Convenience goods	3.3	1.9	1.0	-0.9	8.4	-6.2	0.2	0.0	0.1
Comparison goods	4.8	5.4	3.4	4.3	-8.5	6.5	3.8	3.0	2.9

Source: Figure 1a and Figure 1b of Experian Retail Planner Briefing Note 18

- 2.17 Whilst the above figures relate to a level of growth which is significantly below that which has historically been available to retailers, the situation for high street stores is exacerbated through the increasing amount of expenditure which is committed through special forms of trading<sup>6</sup> and, in particular, online.
- 2.18 In this regard, Appendix 3 of ERPBN18 indicates that special forms of trading accounted for just under 27% of total retail sales at 2020 as a consequence of Covid-19 and subsequent to very strong growth in online retailing over the past decade. Although the growth in special forms of trading is anticipated to drop back slightly in 2021, Experian believes that special forms of trading will account for almost 30% of retail sales by 2026, increasing to around 32% by 2031.
- 2.19 The below Table 2.2 sets out Experian’s identified and forecast level of special forms of trading as a proportion of overall convenience and comparison goods expenditure. Experian estimates that special forms of trading will account for over a third of comparison goods expenditure and over a fifth of convenience goods expenditure at 2031.

<sup>6</sup> Including internet sales, mail order, stalls and markets, door-to-door and telephone sales

**Table 2.2: Experian’s Identified and Forecast Market Share of Non-Retail Sales for Convenience and Comparison Goods Sectors**

Volume Growth Per Head (%)	2016	2017	2018	2019	2020	2021	2026	2031
Convenience goods	10.0	11.6	12.8	14.1	21.1	18.1	21.2	22.8
Comparison goods	18.5	20.8	22.4	23.4	30.6	29.1	33.7	36.2

Source: Figure 5 of Experian Retail Planner Briefing Note 17

- 2.20 The ongoing popularity of internet shopping continues to have clear implications in respect of the viability of some ‘bricks and mortar’ retailers. However, it is important to note that changes in how people shop also bring about some opportunities for retailers trading from the high street. In particular, many stores sell online but fulfil orders from regular stores rather than warehouses<sup>7</sup>, with purchases therefore helping to sustain tangible retail floorspace. As a consequence, Experian also provides an ‘adjusted’ estimate of special forms of trading, which relates to expenditure which is not available to actual stores.
- 2.21 One way in which online expenditure can help sustain bricks and mortar retailers is through the use of the internet to ‘click and collect’, with purchases being picked up at a dedicated counter within a store. In addition, it is evident that some retailers (particularly those offering big ticket items) are benefitting from having a bricks and mortar presence which can be used as a ‘showroom’ in order to view and try goods, with some purchases then being made later online. Retailers are also more frequently providing in-store wi-fi and ‘technology points’, which can allow shoppers to browse a wider product range than is carried in-store. Accordingly, whilst new technology provides significant challenges to bricks and mortar operators, it also provides opportunities for more progressive operators that are able to invest in new technology.

### Convenience Goods

- 2.22 Recent socio-economic conditions have led to significant shifts in convenience goods retailing, which have resulted in the ‘big four’ supermarket operators’ market share being cut. Mintel<sup>8</sup> finds that the decline of the food superstore is well established and that this can be attributed to two issues.

<sup>7</sup> This is particularly the case with food shopping and speciality comparison goods purchases, where retailers often try to tap into a wider market through an online presence

<sup>8</sup> ‘UK Retail Rankings’, Mintel, April 2018

- 2.23 Firstly, people are undertaking food shopping in different ways. More people are living in town and city centres and more people are having difficulties financing the purchase of their own home. Mintel indicates that such people are more likely to undertake food shopping on a 'as needs' basis and are more likely to eat out or use takeaways. As such, they are less likely to have need to undertake a 'main food shop'.
- 2.24 Secondly, the current uncertainty in the economy has made hard discounters (namely Aldi and Lidl) a more attractive proposition and are particularly thriving given that shoppers are currently having to be 'money savvy'. Discounters have also made efforts to try to compete more directly with the 'big four' supermarket operators, with larger stores, greater ranges, fresh foods and premium products becoming increasingly prevalent. When analysing the performance of Aldi, Retail Economics<sup>9</sup> notes that it has **'attacked the heartland of UK grocery'** by undercutting the 'big four' with highly competitive prices and investing in more high quality premium produce. In a similar way, Lidl has also adopted an aggressive growth programme relating to its pricing, produce offer and store openings since 2013.
- 2.25 The move towards the middle ground has allowed discounters to secure market share from both superstores and smaller convenience stores. In addition, we note that discount retailers are often happy to trade alongside more upmarket convenience goods retailers (such as Marks & Spencer Foodhall) as, collectively, the two stores can meet many food shopping needs.
- 2.26 The shifts in the sector are illustrated with reference to changes in retailers' market share in recent years. As Table 2.3 sets out, the market share of each of the 'big four' has been consistently eroded in recent years, with Tesco and Morrisons being the subject of the largest percentage point losses. Tesco's market share of the UK grocery market has reduced from 23.7% at 2011 to 21.6% at 2016, and Morrisons' market share reduced from 9.5% to 7.7% over the same timeframe. The greatest beneficiaries have been Aldi and Lidl, with the former's market share more than doubling from 1.9% at 2011 to 5.3% at 2016. Lidl's market share increased from 1.9% to 2.7% over the same period.

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<sup>9</sup> 'UK Food and Grocery', Retail Economics, September 2015

**Table 2.3: Market Share of Principal UK Grocers**

	2011	2012	2013	2014	2015	2016
Tesco	23.7%	23.9%	23.0%	22.5%	22.0%	21.6%
Sainsbury's	12.8%	13.1%	12.9%	12.8%	12.2%	11.9%
Asda	12.5%	13.3%	13.0%	13.0%	12.0%	11.5%
Morrisons	9.5%	9.3%	8.9%	8.2%	7.9%	7.7%
Aldi	1.9%	2.6%	3.3%	4.2%	4.8%	5.3%
Co-operative Food	5.5%	5.4%	5.1%	4.9%	4.8%	4.7%
Waitrose	3.5%	3.6%	3.7%	3.9%	3.9%	3.9%
Marks & Spencer	3.6%	3.7%	3.7%	3.8%	3.9%	3.9%
Lidl	1.9%	2.0%	2.0%	2.2%	2.4%	2.7%
Iceland	1.8%	1.9%	1.9%	1.9%	1.8%	1.8%

Source: UK Food & Grocery Retailer Update, October 2016

- 2.27 As a consequence of the above, the 'big four' grocers have closed some of their loss-making stores and larger stores have accommodated further concessions in order to take floorspace which is no longer required for the operators' main product range. By way of example, Sainsbury's has opened around 250 Argos concessions within Sainsbury's foodstores. Other food superstores have welcomed additional concessions (including day to day services, such as dry cleaning and key cutting).
- 2.28 Discount operators continue to be generally optimistic in respect of their future growth. In September 2020, Aldi announced plans to open a further 100 stores as part of a UK investment drive<sup>10</sup>. Similarly, Lidl recently confirmed its intention to open a further 50 more new stores over the course of 2021<sup>11</sup>.
- 2.29 Although one of the more established operators has sought to take on the discounter market with their own operation, namely Tesco with Jack's which opened in its first store in September 2018. However, the Jack's operation trades from around a dozen stores and it is not thought that any further expansion is imminent.

### Comparison Goods

- 2.30 The comparison goods sector is currently being squeezed by a number of factors, the most substantial being the effects of Covid-19 and the efforts to contain it. Other factors include reduced expenditure growth, the ability of internet shopping to plug gaps in retailer representation, increases in the minimum wage, and business rates changes. This 'perfect storm' has resulted in changes in the structure

<sup>10</sup> Article headlined 'Aldi to create 4,000 more UK jobs as sales surge in Covid crisis', The Guardian, 28 September 2020

<sup>11</sup> Article headlined 'Lidl's investment in 51 new UK shops sends it into the red', The Guardian, 28 January 2021

of retailing on the UK high street and a generally lesser reliance on comparison goods retail. To underscore this, the Centre for Retail Research reported that 2020 was the worst year for the retail job losses in more than 25 years. Around 180,000 retail jobs were lost in total, with this figure representing a rise of almost a quarter on 2019<sup>12</sup>.

2.31 Whilst the sector is continually evolving and there are a number of ongoing success stories (including Primark, Zara, Jack Wills, Joules and Hotel Chocolat), recent headlines have focussed on failing retailers and store closures. High profile retailers that have struggled include:

- a. Debenhams announced the closure of all 124 stores with the loss of 12,000 jobs in December 2020<sup>13</sup>;
- b. The Arcadia group, which owns Topshop, Topman and Dorothy Perkins, fell into administration in November 2020<sup>14</sup>. In January 2021 Arcadia announced the closure of 31 stores, including the 21 Outfit shops<sup>15</sup>;
- c. Mothercare ceased trading in November 2019 with the closure of 79 stores<sup>16</sup>;
- d. Bonmarche, which went into administration in October 2019, with the closure of 318 stores<sup>17</sup>;
- e. Karen Millen and Coast announced in August 2019 that all 32 standalone and 177 concessions stores were to close<sup>18</sup>;
- f. Laura Ashley went into administration in March 2020, resulting in the closure of 150 stores<sup>19</sup>;
- g. Dixons Carphone announced the closure of 531 stores in March 2020<sup>20</sup>; and
- h. Oasis and Warehouse announced the closure of all their stores with the loss of more than 1,800 jobs in April 2020<sup>21</sup>.

2.32 Furthermore, Intu Properties, one of Britain's biggest shopping centre owners, fell into administration in June 2020 after failing to secure an agreement with its creditors<sup>22</sup>.

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<sup>12</sup> Article headlined 'Retail sales in 2020 'worst for 25 years', BBC, 12 January 2021

<sup>13</sup> Article headlined 'Debenhams set to close putting 12,000 jobs at risk', BBC, 1 December 2020

<sup>14</sup> Article headlined 'Topshop owner Arcadia goes into administration', BBC, 30 November 2020

<sup>15</sup> Article headlined 'Arcadia set to shut 31 shops with loss of 700 jobs', BBC, 19 January 2021

<sup>16</sup> Article headlined 'Mothercare to cease all UK trading with loss of 2,800 jobs', The Guardian, 5 November 2019

<sup>17</sup> Article headlined 'Fashion chain Bonmarche calls in administrators', The Guardian, 18 October 2019

<sup>18</sup> Article headlined 'Boohoo moves for Karen Millen and Coast but 1,100 jobs at risk', The Guardian, 6 August 2019

<sup>19</sup> Article headlined 'Laura Ashley to file for administration as coronavirus takes toll', The Guardian, 17 March 2020

<sup>20</sup> Article headlined 'Dixons Carphone to close 531 stores, with loss of 2,900 jobs', The Guardian, 17 March 2020

<sup>21</sup> Article headlined 'Oasis and Warehouse to close permanently, with loss of 1,800 jobs', The Guardian, April 2020

<sup>22</sup> Article headlined 'Shopping centre owner Intu collapses into administration', The Guardian, 26 June 2020

- 2.33 Whilst the loss of some of the above names will have significant repercussions for certain towns (particularly those that lose Debenhams, Marks & Spencer or House of Fraser from their high street in very quick succession), some well-known retailers have failed to 'move with the times' and update their offer, accommodation and online presence. This is partly a consequence of retailers struggling to reinvest in their business when margins are tight (or non-existent).
- 2.34 More generally, there has been particular issue in respect of the 'polarisation' of shopping habits, whereby shoppers have increasingly been prepared to travel to access a greater choice of shops and services, effectively visiting centres for the day as a leisure activity. Consequently, larger retail venues (with a sub-regional or regional role) have tended to perform relatively well, but smaller centres (particularly those located in satellite towns around major centres) have struggled. The performance of smaller towns has been particularly affected by the last recession and by internet shopping, which has resulted in some retailers believing that they can cover the UK with a lesser number of stores. It is also evident that certain retailers – including Marks & Spencer, Next and retailers within the Arcadia Group – are prepared to close town centre stores and instead trade out of centre.
- 2.35 It will be interesting to see whether any permanent change in working from home may act to counterbalance the polarisation trend, given the prospect of fewer commuters in larger centres and greater numbers of people spending the working day in and around their home.
- 2.36 Whilst structural changes have had a material impact on the vitality and viability of many UK high streets, there are some beneficiaries. In particular, household discount operators, such as B&M Bargains, Poundland and Wilko, have reoccupied a number of medium to large retail units. However, as evidenced by the failure of Poundworld, there is some evidence that this market may be approaching capacity.
- 2.37 It remains to be seen what additional long-term impacts will eventuate from retail closures resulting from Covid-19 containment measures. However, prior to the implementation of lockdown measures trading conditions for retailers were challenging and many retailers were struggling to meet costs, including rents, resulting in a larger number of retailers restructuring or entering administration. As has been seen throughout 2020, the conditions have only become more challenging.

## Leisure and Food & Drink

- 2.38 The greater availability of high street units appears to have helped stoke an entrepreneurial spirit in recent years, with a number of centres beginning to benefit from a greater focus on independent retailers and also modern markets, which are frequently focussed around food and drink operators.
- 2.39 The importance of the independent sector is exemplified by the success of Altrincham market in Greater Manchester, which accommodates six different kitchens, a coffee shop, chocolatier, a wine shop and a bar. The regeneration of Altrincham market has resulted in a resurgence of the wider town centre as a destination to eat and drink. The confidence in Altrincham as a dining destination has had a beneficial impact on the town's vacancy rate, and also now appears to be helping to attract new retailers to the town.
- 2.40 The 'Altrincham model' is widely cited in considering town centre regeneration, albeit it needs to be understood with reference to its affluent catchment area. As such, whilst some of Altrincham's successes may be transferable to different locations, others may not. Notwithstanding this, we recognise that foodhall concepts – based around a choice of cuisine and shared, informal dining areas – are now being successfully integrated into smaller centres.
- 2.41 More generally, the food and drink sector has also been buoyed in recent years by the success of mid-market national multiples, which expanded quickly across the UK. However, there are signs that the market is becoming saturated in some locations and a number of high profile operators have been in financial difficulty. These operators include Byron, Carluccio's and Jamie's Italian, which have all closed a number of restaurants in recent years. Given the problems suffered by such operators, the market has become more cautious and mid-market operators are picking new sites carefully as a result.
- 2.42 A further significant recent high street success story has been the resurgence of the town centre leisure sector, which has resulted in new cinemas being developed close to the shopping core and 'competitive socialising' concepts, which include bowling, crazy golf, table tennis, darts, axe-throwing and other seemingly niche pursuits.
- 2.43 Cinema openings have been on the up in recent years and 'boutique' cinema operators – including Curzon, Everyman and The Light – are able to operate from smaller sites in town centres (partly as a consequence of digital technology). Town centre cinema development has successfully underpinned

wider mixed-use developments, as food and drink operators are typically keen to locate in close proximity to benefit from spin-off custom. New, innovative leisure operators have been particularly beneficial both in re-using existing difficult to let premises, and in driving the evening economy.

2.44 More generally, the gym market continues to perform well, with the Leisure Database Company identifying that there are now more than 7,000 gyms across the UK, with the fitness market having an estimated value of more than £5bn. The Leisure Database Company suggests that this is a 'golden age of fitness', with around one in every seven Britons having a gym membership. Budget gyms are currently particularly popular, with operators such as Pure Gym, the Gym Group and easyGym utilising a format that is based on low costs and high volume.

### High Street Task Force

2.45 The Government has announced a new £675 million Future High Streets Fund will be set up to help local areas to respond to and adapt to these changes. It will serve two purposes: it will support local areas to prepare long-term strategies for their high streets and town centres, including funding a new High Streets Taskforce to provide expertise and hands-on support to local areas. It will also then co-fund with local area projects including:

- a. investment in physical infrastructure, including improving public and other transport access, improving flow and circulation within a town/city centre, congestion-relieving infrastructure, other investment in physical infrastructure needed to support new housing and workspace development and existing local communities, and the regeneration of heritage high streets; and
- b. investment in land assembly, including to support the densification of residential and workspace around high streets in place of under-used retail units.

2.46 In 2019, it was announced that Sefton Council were intending to submit bids to the Government for investment as part of the Future High Streets Fund (FHSF) for both Crosby and Southport. In August 2019, the Government announced that both centres had been unsuccessful in their bids.

2.47 To supplement this, in September 2019 the Government announced that 100 places across England would be invited to develop regeneration plans as part of a £3.6 billion scheme known as the Towns Fund. Focusing on primarily former industrial areas, the Towns Fund aims to improve the economic



growth prospects of the area through interventions focused on improving transport, broadband connectivity, skills and culture.

- 2.48 Within the Study Area, a bid for £50million in funding has been submitted for two proposals to the Government's Town Fund. These projects include the revamp of Southport Market and the creation of the Southport Cove Resort, with surf pool.

## 3.0 Planning Policy Context

3.1 In order to shape the direction of this Study, it is helpful to understand relevant retail and town centre planning policy at a national and local level. As such, we first summarise national planning policy of relevance before considering relevant development plan policy as set out in the Local Plan for Sefton. We also consider changes to the Use Classes Order and the application of permitted development rights to town centre uses.

### Revised National Planning Policy Framework

3.2 The most recent iteration of the National Planning Policy Framework ('NPPF') was published in February 2019. The NPPF reflects the fact that the traditional role of town centres has been somewhat undermined by structural changes in the retail sector, and that there may be a need to plan for a more diverse range of uses going forward. As such, the NPPF advocates a more flexible policy framework to support the future vitality and viability of town centres.

3.3 NPPF policies are considered on a thematic basis below.

#### Plan-Making

3.4 Paragraph 20 of the NPPF indicates that development plans should set out an overall strategy for the pattern, scale and quality of development, including policies to deliver retail, leisure and other commercial development. Paragraph 31 states that the preparation and review of all policies should be underpinned by relevant and up-to-date evidence. This should be proportionate and take into account relevant market signals.

#### Building a Strong, Competitive Economy

3.5 Paragraph 80 of the NPPF indicates that planning policies and decisions should help create the conditions in which businesses can invest, expand and adapt. Significant weight should be placed on the need to support economic growth and productivity, taking into account both local business needs and wider opportunities for development.

### Ensuring the Vitality of Town Centres

3.6 Paragraph 85 specifically relates to planning for town centres. It states that:

**'Planning policies should:**

- a. **define a network and hierarchy of town centres and promote their long-term vitality and viability – by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters;**
- b. **define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre;**
- c. **retain and enhance existing markets and, where appropriate, re-introduce or create new ones;**
- d. **allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability, so town centre boundaries should be kept under review where necessary;**
- e. **where suitable and viable town centre sites are not available for main town centre uses, allocate appropriate edge of centre sites that are well connected to the town centre. If sufficient edge of centre sites cannot be identified, policies should explain how identified needs can be met in other accessible locations that are well connected to the town centre; and**
- f. **recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites.'**

3.7 The requirement to plan to meet needs across a minimum ten year period represents a change from the previous NPPF which required town centre needs to be met in full across the entire plan period.

3.8 In addition, it is notable that the NPPF Annex 2 Glossary fails to make any reference to the designation of primary and secondary frontages. Page 32 of the Government Response to the Draft Revised National Planning Policy Framework Consultation<sup>23</sup> indicates that, whilst the revised NPPF has removed the expectation in national planning policy that such frontages must be defined, this does not necessarily preclude authorities from doing so where their use can be justified. However, it is evident that the general intention is to provide for more flexibility through a less prescriptive approach to land use.

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<sup>23</sup> Published July 2018.

3.9 Paragraph 89 of the NPPF states that it is appropriate to identify thresholds for the scale of edge of centre and out of centre retail and leisure development that should be the subject of an impact assessment. Any such threshold policy applies only to the impact test. All planning applications for main town centre uses that are not in an existing centre and not in accordance with an up-to-date development plan will generally be the subject of the sequential test<sup>24</sup>.

#### Promoting Healthy and Safe Communities

3.10 Paragraph 92 seeks to support the social, recreational and cultural facilities and services the community needs.

3.11 As such, planning policies and decisions should:

- plan positively for the provision and use of shared spaced, community facilities (such as local shops, meeting places, sports venues, open space, cultural buildings, public houses and places of worship), and other local services to enhance the sustainability of communities and residential environments;
- take into account and support the delivery of local strategies to improve health, social and cultural well-being for all sections of the community;
- guard against the unnecessary loss of valued facilities and services, particularly where this would reduce the community's ability to meet its day-to-day needs;
- ensure that established shops, facilities and services are able to develop and modernise, and are retained for the benefit of the community; and
- ensure an integrated approach to considering the location of housing, economic uses and community facilities and services.

#### **Ensuring the Vitality of Town Centres Planning Practice Guidance**

3.12 The Ensuring the Vitality of Town Centres Planning Practice Guidance ('the Town Centres PPG') was published in July 2019 and provides additional direction in respect of how retail and town centre planning policy should be applied in respect of plan-making and decision taking. The Town Centres PPG affirms the Government's aspiration to support town centres in order to generate employment,

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<sup>24</sup> With the exception (in accordance with paragraph 88 of the NPPF) of small scale rural office proposals and other small scale rural development.

promote beneficial competition and create attractive, diverse places where people want to live, work and visit.

3.13 Paragraph 004 of the Town Centres PPG indicates that a local planning authority's strategy for their town centres should include:

- The realistic role, function and hierarchy of town centres over the plan period. Given the uncertainty in forecasting long-term retail trends and consumer behaviour, this assessment may need to focus on a limited period (such as the next five years), but will also need to take the lifetime of the plan into account and be regularly reviewed.
- The vision for the future of each town centre, including the most appropriate mix of uses to enhance overall vitality and viability.
- The ability of the town centre to accommodate the scale of assessed need for main town centre uses, and associated need for expansion, consolidation, restructuring or to enable new development or the redevelopment of under-utilised space.
- How existing land can be used more effectively – for example, the scope to group particular uses such as retail, restaurant and leisure activities into hubs or for converting airspace above shops.
- Opportunities for improvements to the accessibility and wider quality of town centre locations, including improvements to transport links in and around town centres, and enhancement of the public realm.
- What complementary strategies are necessary or appropriate to enhance the town centre and help deliver the vision for its future, and how these can be planned and delivered. For example, this may include consideration of how parking charges and enforcement can be made proportionate.
- The role that different stakeholders can play in delivering the vision. If appropriate, it can help establish the level of cross-boundary/strategic working or information sharing required between both public and private sector groups.
- Appropriate policies to address environmental issues facing town centres, including opportunities to conserve and enhance the historic environment.

3.14 This particular piece of work seeks to provide a general Borough-wide retail strategy which will provide an overall context to the determination of planning application for such uses and will help inform the Council's consideration of specific strategies and regeneration initiatives. As such, many of the above detailed requirements could be addressed by future centre-specific commissions.

3.15 Paragraph 006 of the Town Centres PPG identifies a series of key indicators of relevance in assessing the health of a centre over time<sup>25</sup>. The indicators allow the role, performance and function of centres to be monitored and are considered in greater detail at Section 5 of this report (which specifically addresses the vitality and viability of Sefton's principal centres).

### Use Classes Order

3.16 Significant changes to the Use Classes Order have been enacted through the Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020, which came into force on 1 September 2020.

3.17 The amendments include the revocation of Parts A and D, and the introduction of three new Use Classes, these being Classes E, F1 and F2. The Government's objective is that the changes will support the revival of the high street and allow for greater flexibility in changing uses within town centres without the need for planning permission.

3.18 In addition to the three new Use Classes, the changes also result in some changes in respect of uses classified as sui generis. In practical terms, the changes comprise:

- **Use Class E** – Commercial, business and service uses include: shops or retail; cafes or restaurants; financial services; professional services; any service appropriate to provide in a commercial, business or service locality; indoor sports, recreation or fitness; medical or health services; creche, day nursery or day centre; and, offices.
- **Use Class F1** – Learning and non-residential institutions include any non-residential use for the: provision of education; display of works of art; museum; public library or public reading room; public hall or exhibition hall; for or in connection with public worship or religious instruction; or, as a law court.
- **Use Class F2** – Local community uses include: a shop selling mostly essential goods, including food, no larger than 280 sq.m and where there is no other such facility within 1,000 metres radius of the shop's location. A hall or meeting place for the local community, an area or place for outdoor sport or recreation and an indoor or outdoor swimming pool or skating rink.
- **Sui Generis** – Use within this Class now include Public house, wine bar or drinking establishment;

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<sup>25</sup> These indicators inform the healthcheck assessments that are set out at Section 5 of this report.

a drinking establishment with expanded food provision; as a hot food takeaway for the sale of hot food where consumption of that food is mostly undertaken off the premises; live music venue; cinema; concert hall; bingo hall; or, dance hall.

- 3.19 The introduction of Class E is significant and places a wide range of uses including retail, food, financial services, gyms, healthcare, nurseries, offices and light industry into a single use class.
- 3.20 As ever, the Use Classes are not linked to any spatial considerations. As such, the expanded Use Class E applies equally to both town centres and out of centre locations, and there may be unintended consequences in providing additional flexibility across Class E outside of town centres. Accordingly, it may be necessary for the Council to apply restrictive conditions to certain forms of development in order to restrict the authorised use to that which has been justified in the application submission. This will help ensure that unacceptable impacts do not arise from future Class E development.
- 3.21 The 2020 Regulations contain a temporary provision – lasting until 31 July 2021 – which retains the effect of the existing permitted development rights based on the pre-1 September 2020 Use Classes. Further changes to permitted development rights are expected to be brought in prior to the expiration of the material period to 31 July 2021 to take account of the new Use Classes.

### **Permitted Development Rights**

- 3.22 A broad range of national permitted development rights support changes of use in town centres. These rights are set out in the Town and Country Planning (General Permitted Development) (England) Order 2015, as amended. Many of these permitted development rights relate to uses defined in the Use Classes Order before it was amended on 1 September 2020. As mentioned above, these rights will continue to apply in their current form until 31 July 2021.
- 3.23 Many of the permitted development rights apply without any application process. Other require prior approval, including the change of use:
- from shops, financial and professional services, a betting shop, pay day loan shop, launderette, and hot food takeaway premises to residential use;
  - from amusement arcades / centres or casinos to residential use; and
  - from offices to residential use.

3.24 In addition to the above, the Government consulted from 3 December 2020 to 28 January 2021 on a proposed new permitted development right for the change of use from Commercial, Business and Service use (Use Class E) to residential use (Use Class C3) to create new homes. It is proposed that the right would allow for the change of use from any use, or mix of uses, within Class E to Class C3. This is a significant amendment which, if confirmed, will allow a wide range of uses to benefit from permitted development rights to residential use for the first time.

### Local Planning Policy Context

3.25 The statutory development plan is the Local Plan for Sefton, which was adopted in April 2017.

3.26 Local Plan Policy SD2 sets out broad principles for sustainable development in Sefton Borough and identifies a requirement to ‘...**help Sefton’s town and local centres to diversify and thrive...**’.

3.27 The key policy of direct relevance to retail and town centre is Policy ED2, which identifies a hierarchy of centres and sets out the key tests to be applied to planning applications for main town centre uses.

3.28 Policy ED2 indicates that retail, leisure and other main town centre uses will be directed towards the Borough’s existing centres as shown on the Policies Map in accordance with the following hierarchy:

- **Town Centres:** Bootle and Southport;
- **District Centres:** Crosby, Formby, Maghull and Waterloo;
- **Local Centres:** Ainsdale, Birkdale, Churchtown, Netherton and Old Roan.

3.29 Planning permission will only be granted for development which is appropriate to the role and function of each centre.

3.30 Policy ED2 goes on to provide a sequential test which states that:

**‘Proposals for all retail, leisure and other main town centre uses will be subject to a sequential approach to development. This will require applications for town centre uses to be located firstly in:**

- a. **Primary Shopping Area (retail uses only), then**
- b. **Town, district and local centres (in accordance with the hierarchy in part 1)**
- c. **Edge of centre locations, and**
- d. **Only if suitable sites are not available should out of centre sites be considered.**



**When considering new proposals in out of centre locations, preference will be given to accessible sites that are well connected to a defined centre in accordance with part 1 of the policy. For retail uses, if there are no accessible out of centre sites that are well connected to a defined centre, preference will be given to the existing retail parks (as shown on the Policies Map).'**

- 3.31 It is therefore evident from the above that the Council's sequential test differentiates between the primary shopping area and the rest of the town centre, and identifies a preference for development to be located at out of centre retail parks over other out of centre sites (where both fail to connect well to an identified centre).
- 3.32 In respect of the matter of impact, Policy ED2 indicates that a threshold of 500 sq.m applies in this instance and the proposal should therefore demonstrate compliance with the requirements of the impact test.
- 3.33 In this regard, Policy ED2 indicates that retail proposals should demonstrate that:
- they would not have a significant adverse impact on the delivery of existing, committed and planned public and private investment within any identified centre; and
  - no significant adverse impact on the vitality and viability of any existing centre will arise from the proposed development, including to local consumer choice and trade in defined centres and wider area, for up to five years from the time the application is made. For major schemes where the full impact will not be realised in five years, the impact should also be assessed up to ten years from the date of submission.
- 3.34 Policy ED2 goes on to indicate that the retail function of defined primary shopping areas should not be undermined and that 70% of primary retail frontages should fall within Class A1 retail use.
- 3.35 The policy also confirms that Bootle is the main focus for local convenience and comparison retail development in the south of Sefton, and that Southport performs a similar function in the north of the Borough.
- 3.36 Local Plan Policy ED6 identifies the priority areas for regeneration in Sefton. Included among these areas are Bootle Central Area, Central Southport, Crosby Centre, and Maghull Centre.
- 3.37 The Southport Central Area is considered within Policy ED7, which states that development proposals should be consistent with, and make a positive contribution to, the economic function of the area, the

quality of the environment and maintain the significance of heritage assets and their settings. Development proposals within the Southport Central Area for hotels and guest houses, arts and cultural uses and visitor attractions, education uses including the expansion of Southport College and uses which secure a sustainable future for vacant or 'at risk' heritage assets.

- 3.38 Policy ED11 relates to Crosby Centre and states that within the centre proposals should be consistent with, and make a positive contribution to, the regeneration of the centre. New retail and other town centre developments of an appropriate scale will be supported in order to improve the vitality and viability of the centre. Proposals that would prejudice the comprehensive development of key sites within the centre will not be permitted.

## 4.0 Market Research

### Market Share Analysis: Household Survey Results

- 4.1 The NEMS household survey identifies where residents travel to undertake a range of shopping and leisure activities. The summary of results provided in this section focusses on the market share of shopping trips secured by retail venues for various types of shopping.
- 4.2 In September and October 2020, a survey of 1,000 households was undertaken across the defined Study Area which comprises eight separate zones and stretches beyond the Sefton administrative boundaries to incorporate outlying areas, including parts of the Liverpool, West Lancashire and Knowsley authority areas. The Study Area is consistent with that used in the 2015 RSR, thereby making it possible to compare and contrast the shopping patterns from 2015 to 2020.
- 4.3 Sefton's authority area is principally located within Zones B 'Bootle', C, 'Crosby', F 'Formby', M 'Maghull' and S 'Southport' of the adopted Study Area, and this area is therefore of particular interest in considering market share. It is important to note however that there are limited parts of Zone B, F, M and S which are located outside of Sefton Borough, and limited parts of Zones K 'Knowsley', NL 'North Liverpool' and O 'Ormskirk' which are located within the Borough.
- 4.4 In this regard, we expect Sefton's convenience goods provision to secure almost all of the convenience goods turnover which originates within these five central zones (as convenience goods shopping is generally undertaken as close to home as possible). In respect of comparison goods, the role of Liverpool city centre is such that it acts to attract a significant proportion of such expenditure away from the Study Area.
- 4.5 The household survey is reproduced as part of Appendix II of this Study. In retail terms, the principal purpose of the survey is to establish:
- i) patterns of convenience goods spending, based on the location of:
    - the shop where the respondent last visited and visited 'the time before last' to undertake their main food shop; and
    - the shop where the respondent last visited and visited 'the time before last' to undertake their top up food shop.

- ii) patterns of comparison goods spending, based on the location of the respondent's last shopping trip to purchase the following types of comparison goods:
- clothing and footwear;
  - books, CDs, DVDs and stationery;
  - small household goods, such as home furnishings, clocks, jewellery, glass and china;
  - toys, games, bicycles and recreational goods;
  - chemist goods, including health and beauty items;
  - electrical goods, such as televisions, washing machines and computers;
  - DIY and gardening goods; and
  - furniture, carpets and floor coverings.

4.6 The analysis which follows considers market shares for the above sub-sectors. Our assessment is based on the market share of *trips* to particular retail destinations. In most cases, we are able to compare the current market share findings with those established in the 2015 RSR.

4.7 The 2015 RSR focussed principally on the levels of convenience and comparison market share retention within each zone. We have expanded this analysis to include commentary on the draw of expenditure to principal shopping destinations around the Sefton area, in order to better understand how shopping habits may have altered in the past five years. This also provides for a more comprehensive understanding of the role and function of defined centres in meeting residents' shopping needs, and the competition provided by out of centre stores, and how such provision may have impacted on the performance of defined centres.

### **Convenience Goods Analysis**

#### Main Food Shopping Patterns

4.8 Table 4.1 below shows that convenience goods stores located within Sefton claim a total combined market share of 65% of all main food shopping trips in the Study Area. This overall figure has dropped by two percentage points since 2015.

4.9 Overall, Table 4.2 demonstrates that for those zones which principally fall within the Borough (Zones S, F, C, B and M), the stores which are located within the Borough attract over 75% of the main food market share, with Sefton facilities retaining well over 90% of main food trips in Zones S, F, C and B.

4.10 The highest levels of retention to Sefton’s facilities are within Zones F and C at 98%, which has remained broadly consistent over the past 20 years.

**Table 4.1: Main Food Shopping Market Share Analysis to Sefton Facilities by Zone (%)**

	Zone S	Zone F	Zone C	Zone B	Zone M	Zone L	Zone K	Zone O	Total
2001	97%	99%	95%	83%	87%	19%	33%	61%	<b>64%</b>
2005	99%	98%	94%	84%	87%	22%	39%	53%	<b>65%</b>
2011	98%	98%	94%	86%	81%	28%	30%	45%	<b>66%</b>
2015	98%	99%	96%	92%	82%	29%	32%	39%	<b>67%</b>
2020	95%	98%	98%	93%	77%	19%	32%	56%	<b>65%</b>

Source: Table 4.2 from Sefton RSR (2015) and Table 3 of Appendix IV

4.11 Table 4.3 identifies the main food market share attracted by convenience goods facilities in Southport town centre, Bootle town centre, the district centres and other destinations, which include local centres, local parades and out of centre locations.

4.12 Southport town centre (which for the purposes of the analysis includes those stores both within the primary shopping area and the wider town centre boundary) and Bootle town centre attract 9% and 5% of the Study Area’s main food market share respectively. Whilst the market share attracted by Southport town centre has remained relatively consistent since 2011, the market share claimed by Bootle town centre has decreased by five percentage points since 2015.

4.13 We can see from Table 4.2 that Southport town centre remains an important destination to meet residents’ shopping needs in Zone S, attracting approximately 37% of all Study Area main food trips. The key grocery destinations within the town centre include the Morrisons at Winter Gardens (which attracts 14% of main food trips in Zone S) and the Asda at C12 Shopping Park (which attracts 13% of main food trips in Zone S). The Sainsbury’s at St. George’s Place and the Lidl at Virginia Street attract 6% and 4% of Zone S residents’ main food trips respectively.

4.14 As we explore in more detail below, the market share attracted to each of these destinations from Zone S residents has reduced since 2015, with the biggest drop associated with the Asda at C12 Shopping Park (a reduction from 20% of Zone S main food trips in 2015 to 13% in 2020), and the Morrisons at Winter Gardens (a reduction from 16% in 2015 to 14% in 2020).

**Table 4.2: Main Food Shopping Market Shares by Centre**

Centre	Year	Zone S	Zone F	Zone C	Zone B	Zone M	Zone L	Zone K	Zone O	Total
Southport Town Centre	2020	37%	7%	0%	0%	0%	0%	0%	15%	<b>9%</b>
	2015	49%	3%	0%	0%	0%	0%	0%	11%	<b>10%</b>
	2011	47%	9%	5%	1%	2%	0%	0%	14%	<b>11%</b>
Bootle Town Centre	2020	0%	0%	6%	17%	3%	5%	0%	0%	<b>5%</b>
	2015	1%	0%	5%	33%	2%	17%	0%	0%	<b>10%</b>
	2011	0%	0%	11%	35%	0%	8%	0%	0%	<b>9%</b>
District Centres	2020	1%	30%	33%	5%	27%	0%	2%	5%	<b>8%</b>
	2015	2%	48%	27%	7%	33%	0%	3%	2%	<b>9%</b>
	2011	4%	40%	47%	4%	34%	2%	1%	2%	<b>11%</b>
Other	2020	57%	60%	59%	71%	47%	14%	30%	36%	<b>43%</b>
	2015	46%	48%	64%	52%	47%	12%	29%	26%	<b>38%</b>
	2011	47%	49%	31%	46%	45%	18%	29%	29%	<b>35%</b>

Source: Table 4.3 from Sefton RSR (2015) and Table 3 of Appendix IV, town centres include edge of centre facilities, 'other' includes local centres, local parades and out of centre destinations

- 4.15 Table 4.3 below provides the top three main food destinations for residents in each of the five key zones located principally within Sefton Borough. We compare these with the top destinations from the 2015 RSR to establish how shopping patterns have altered in the last five years.
- 4.16 Key main food destinations for Zone S residents, which covers the Southport area, are the Tesco Extra and Aldi foodstores at Meols Cop, which respectively claim 21% and 14% of main food shopping trips which originate within the zone. Furthermore, the Aldi in Birkdale claims 18% of Zone S main food shopping trips, and the Morrisons at Winter Gardens in Southport claims 14% of such food trips. The Tesco Extra has remained the principal destination for main food shopping for Zone S residents, although the market share has reduced by four percentage points between 2015 and 2020. However, the second and third most popular main food shopping destinations for Zone S residents are now the Aldi store at Birkdale and the Aldi at Meols Cop.
- 4.17 In terms of Zone F, the Tesco and Waitrose still remain the most popular main food shopping destinations for this zone's residents, with the Tesco having increased its main food market share from 27% to 44%. By way of contrast, the Waitrose store has been the subject of a significant reduction in Zone F market share from 44% in 2015 to 22% in 2020.
- 4.18 Key main food convenience destinations for Zone B destinations include the Asda at Aintree (which claims 19% of Zone B main food shopping trips), followed by the Tesco Superstore at Litherland (which claims 17% of these trips), and then the Aldi at Netherton (13% of trips). Whilst the Tesco store at Litherland has remained in the top three destinations for Zone B residents, its market share has

decreased by ten percentage points between 2015 and 2020. The performance of the Aldi at Netherton has improved significantly since the previous Study, and its strong performance has clearly contributed to the decline in the performance of the Tesco store down the A5036.

**Table 4.3: Principal Main Food Shopping Destinations for Sefton Zones**

Year		Zone S	Zone F	Zone C	Zone B	Zone M
2020	<b>Principal Destination</b>	Tesco Extra, Meols Cop (21%)	Tesco Superstore, Formby (44%)	Aldi, Thornton, Crosby (28%)	Asda, Ormskirk Road, Aintree (19%)	Morrisons, Maghull (22%)
	<b>Second Destination</b>	Aldi, Birkdale Road, Birkdale (18%)	Waitrose, Formby (22%)	Sainsbury's, Liverpool Road, Crosby (20%)	Tesco Superstore, Litherland (17%)	Asda, Ormskirk Road, Aintree (16%)
	<b>Third Destination</b>	Aldi, Meols Cop (14%)	Aldi, Birkdale Road, Birkdale (10%)	Tesco Superstore, Altcar Road, Formby (12%)	Aldi, Park Lane West, Netherton (13%)	Lidl, Northway, Maghull (14%)
2015	<b>Principal Destination</b>	Tesco Extra, Meols Cop (25%)	Waitrose, Formby (44%)	Aldi, Moor Lane, Thornton (27%)	Tesco Superstore, Litherland (27%)	Morrisons, Maghull (33%)
	<b>Second Destination</b>	Asda, Central 12 Shopping Park (20%)	Tesco Superstore, Formby (37%)	Sainsbury's, Liverpool Road, Crosby (18%)	Asda, Strand Road, Bootle (21%)	Asda, Ormskirk Road, Aintree (25%)
	<b>Third Destination</b>	Morrisons, Winter Gardens (16%)	Aldi, Moor Lane, Thornton (8%)	Tesco Superstore, Litherland (15%)	Asda, Ormskirk Road, Aintree (14%)	Lidl, Northway, Maghull (8%)

Source: Table 4.2 from Sefton RSR (2015) and Table 3 of Appendix IV

- 4.19 In terms of defined centres, Southport town centre retains a strong influence within its immediate catchment (Zone S), although this has decreased somewhat, with its main food shopping trip market share decreasing from 49% at 2015 to 37% at 2020. Conversely, we note an increase in Zone S main food shopping patterns to convenience destinations situated outside of Southport town centre (and indeed other defined centres), with destinations such as the Tesco Extra at Meols Cop and the Aldi on Liverpool Road attracting high levels of trips. Whilst the market share of the Tesco Extra has reduced since 2015, the Aldi has increased slightly (from a market share of 13% of Zone S main food shopping trips at 2015 to 14% at 2020), despite the presence of a further Aldi store at Birkdale. The Birkdale store opened in 2018 and attracts 18% of Zone S residents' main food shopping trips.
- 4.20 Main food shopping trips attracted to convenience destinations within and on the edge of Southport town centre have increased for residents of Zones F and O (which both immediately surround Zone S), which can be principally attributed to an increase in trips to the Asda and Morrisons foodstores.
- 4.21 The main food market share attracted to Bootle town centre from its immediate catchment (Zone B) has decreased considerably from the 33% share identified at 2015 to 17% at 2020. This is attributable to a substantial decrease in market share attracted to the Asda store on Strand Road from Zone B

residents; from 21% at 2015 to just 8% at 2020. There has also been a substantial increase in the proportion of Zone B main food shopping trips which are directed to the Aldi at Netherton, with the Zone B market share of this store increasing from 4% at 2015 to 17% at 2020. Again, there has been a notable shift in trips from in and edge of centre stores in Bootle to out of centre stores within Zone B.

4.22 The influence of Bootle town centre on the main food market share has also decreased significantly in Zone L since 2015, with a marked decrease from 17% to 5% over this period.

4.23 In terms of Zone M residents, the household survey identifies a reduction in main food trips from Zone M residents to the Morrisons in Maghull (from 33% to 22%), and a decrease in the number of main food trips to the out of centre Asda at Aintree (from 25% to 16%).

#### Top-Up Food Shopping Patterns

4.24 Table 4.4 provides an overview of the market share achieved by top-up food shopping facilities within Sefton Borough by zone. In contrast to the 2015 survey results, the top-up shopping market share for facilities within Sefton is very slightly lower than the market share for main food shopping (63% compared to 65%).

4.25 For the five zones which are predominantly or wholly located within Sefton, the top-up food shopping market share attracted by facilities is very high with all five zones retaining 90% or more of their respective zonal market shares. Indeed, in Zones C, F and S over 95% of the top-up market share is retained.

4.26 In this regard, the level of top-up shopping retention from Zone S residents to facilities also located within Zone S is high at approximately 93%. Key convenience facilities within Zone S meeting residents' top-up shopping needs include the Tesco Extra at Meols Cop, the Aldi in Birkdale and the Asda at C12 Shopping Park at the edge of Southport town centre. In addition, the other local shops in Southport town centre also serve an important role in meeting residents' top-up shopping needs, attracting approximately 9% of trips (which has increased from 2015, when these stores attracted 7% of trips). However, the proportion of Zone S top-up trips attracted by the Sainsbury's at St. Georges Place has decreased considerably from 9% in 2015 to 2% in 2020.



4.27 There has been a decline in top-up food shopping trip retention in Zones B, C and S by eight, two and six percentage points respectively, and with small increases in market share retention being apparent in both Zones F and M. There has been a significant increase in top-up food shopping market share attracted to Sefton facilities within Zone O, from 19% of all such trips at 2015 to 43% at 2020. Within Zone L, there has been a decline in the top-up shopping trips attracted to Sefton facilities of 18 percentage points between 2015 and 2020.

**Table 4.4: Top-up Food Shopping Market Share Analysis by Zone (%)**

	Zone S	Zone F	Zone C	Zone B	Zone M	Zone L	Zone K	Zone O	Total
2001	90%	88%	83%	74%	67%	22%	7%	40%	<b>55%</b>
2005	98%	99%	92%	89%	88%	14%	13%	42%	<b>61%</b>
2011	98%	99%	99%	88%	90%	18%	7%	29%	<b>61%</b>
2015	100%	98%	99%	98%	85%	33%	23%	19%	<b>68%</b>
2020	94%	100%	97%	90%	91%	15%	16%	43%	<b>63%</b>

Source: Table 4.3 from Sefton RSR (2015) and Table 3 of Appendix IV

4.28 Table 4.5 shows the top-up food shopping market shares by centres, again broken down by Southport town centre, Bootle town centre, the district centres, and other destinations.

4.29 Table 4.5 demonstrates that the top-up food shopping market share for both Southport and Bootle town centres has declined since 2015. In Southport, the top-up shopping market share is 4% at 2020, which represents a two percentage point decrease since 2015. Notwithstanding this, Southport town centre (when taking account of all 'in' and 'edge' of centre stores) maintains a 19% market share for top-up food shopping from Zone S residents.

4.30 Bootle has recorded a substantial 22 percentage point decrease in its top-up food shopping market share since 2015 within Zone B. This decrease may be explained by the closure of the M&S and Tesco stores at Bootle Strand Shopping Centre, along with an improvement in the food shopping offer in Zone L. A similar decrease in market share has also been recorded in the neighbouring Zone L, with the top-up market share attracted to Bootle town centre decreasing from 22% of all top-up food shopping trips at 2015 to 8% at 2020.

**Table 4.5: Top-up Food Shopping Market Shares by Centre**

Centre	Year	Zone S	Zone F	Zone C	Zone B	Zone M	Zone L	Zone K	Zone O	Total
Southport Town Centre	2020	19%	0%	0%	0%	0%	0%	0%	5%	4%
	2015	27%	3%	0%	0%	1%	0%	0%	8%	6%
	2011	39%	2%	1%	0%	1%	0%	0%	11%	9%
Bootle Town Centre	2020	0%	0%	4%	16%	0%	4%	0%	0%	4%
	2015	2%	0%	5%	38%	0%	22%	0%	0%	13%
	2011	0%	0%	6%	38%	0%	8%	0%	0%	8%
District Centres	2020	0%	54%	52%	3%	50%	1%	5%	4%	13%
	2015	1%	62%	73%	5%	41%	1%	2%	1%	14%
	2011	2%	74%	80%	2%	49%	2%	0%	6%	17%
Other	2020	75%	46%	41%	71%	40%	11%	10%	34%	42%
	2015	70%	33%	21%	55%	43%	10%	21%	10%	35%
	2011	57%	23%	12%	48%	40%	8%	7%	12%	27%

Source: Table 4.5 from Sefton RSR (2015) and Table 3 of Appendix IV, town centres include edge of centre facilities, 'other' includes local centres, local parades and out of centre destinations

4.31 It is useful to consider the proportion of the Study Area population that resides within Sefton Borough when considering shopping patterns. In this regard, if one were to assume a relatively even and sustainable distribution of convenience goods facilities across the Study Area, it might then be expected that the market share claimed by facilities within Sefton Borough would be generally commensurate with its population. Accordingly, defining Sefton Borough as Zones B, C, F, M and S which broadly correspond to the Borough's administrative boundary, there is a population of 274,462 at 2021 which equates to 55.3% of the overall 2021 Study Area population of 496,308. Assuming that shoppers would generally choose to use shopping facilities that are as conveniently located as possible in respect of their home address, we would anticipate that Sefton's convenience goods facilities would gain a relatively similar market share of main food and top-up shopping.

4.32 Sefton achieves a main food shopping market share of 65% and a top-up shopping market share of 63% from the Study Area at 2021. Therefore, it can be said that Sefton secures a greater number of main food and top-up shopping trips than could be expected based on its share of the Study Area's population. Although these figures represent a decline to those identified at 2015, they demonstrate that facilities within Sefton clearly meet the needs not just of its own residents, but also attract a substantial number of trips from residents of neighbouring authority areas.

### Comparison Shopping Patterns

4.33 Our approach in respect of comparison goods is relatively similar to the above assessment of convenience goods shopping patterns. As such, we:

- first consider the market share of comparison goods expenditure (by sub-sector) claimed by all facilities within the Sefton authority area;
- then consider the comparison goods catchment of both the Sefton authority area, and the principal comparison destinations of the Southport town centre, Bootle town centre and the out of centre facilities at Aintree;
- identify the most popular comparison goods shopping destinations for residents of the Study Area; and
- then consider market share on a sectoral basis (for the critical clothing and footwear sector, and then for non-bulky and bulky goods).

#### Comparison Goods Market Share Secured by Sefton Authority Area

4.34 As Table 4.6 identifies, the Sefton authority area secures a market share of 74.0% of comparison goods expenditure that arises within the central Sefton Zones (Zones S, F, C, B and M) at 2021, and 62.9% of such expenditure that originates within the outer Zones K, L and O. As such, comparison goods retailers within the authority area claim 69.5% of all such Study Area expenditure.

**Table 4.6: Market Share of Comparison Goods Expenditure Secured by Facilities in Sefton**

Year	Type of Comparison Goods Shopping	Sefton Zones (S, F, C, B and M)	Outer Zones (L, K and O)	Overall Study Area
2020	Clothing and footwear	65.1%	62.2%	63.9%
	Books, CDs, DVDs and stationery	67.2%	42.2%	57.1%
	Small household goods	75.5%	65.9%	71.5%
	Toys, games, bicycles and recreational goods	66.3%	47.6%	58.5%
	Chemist goods (including health and beauty)	84.4%	64.0%	76.2%
	Electrical goods	81.8%	78.1%	80.4%
	DIY and gardening goods	90.6%	83.7%	88.0%
	Furniture, carpets and floor coverings	79.4%	66.7%	74.5%
	<b>Overall comparison goods</b>	<b>74.0%</b>	<b>62.9%</b>	<b>69.5%</b>

Source: Tables 9 to 25 of Appendix IV

- 4.35 Table 4.7 below sets out the zonal comparison market share to Sefton Borough at 2021 (the base date of the Study) and compare these with the figures from the 2015 Study. The table demonstrates that the highest Sefton authority retention rates are within Zones S, F, C, B and L. Within these four zones, all have seen an increase in the proportion of expenditure attracted to Sefton authority destinations, with the highest increase being within Zone L, where the market share has increased from 36.2% to 70.9%, an increase in 34.7 percentage points since 2015. This increase can be attributed to an increase in expenditure from Zone L residents to retailers at the out of centre facilities at Aintree from 27.4% to 40.4%.
- 4.36 In addition, the below Table 4.7 indicates that the vast majority of residents within central zones are able to meet their comparison goods shopping needs within Sefton. Within all of the central Zones except Zone M, facilities within the Sefton authority area are able to claim about seven out of every ten comparison goods pounds spent, with higher levels in Zone S. The only exception is Zone M, where a higher level of expenditure is currently being spent at facilities within Liverpool and Knowsley (which are also situated in Zone M).

**Table 4.7: Total Comparison Zonal Market Share Analysis**

Zone	Sefton Authority Area 2021	Sefton Authority Area 2015
S	87.9%	86.4%
F	73.5%	67.2%
C	73.6%	60.9%
B	78.7%	57.4%
M	35.2%	54.7%
L	70.9%	36.2%
K	36.3%	33.9%
O	62.3%	43.9%
<b>Total</b>	<b>69.5%</b>	<b>56.5%</b>

Source: Table 25 of Appendix IV and Appendix 7 of the 2015 Study

#### Dominant Comparison Goods Retail Destinations across the Study Area

- 4.37 Table 4.8 below sets out the turnover and market share for all comparison goods expenditure for the principal destinations within the Study Area.
- 4.38 The Table indicates that the principal destination for comparison goods shopping within the authority area are the out of centre facilities at Aintree which attract a total of 24.2% of the available comparison expenditure at 2020, which has increased from 17.5% at 2015. This is followed by Southport town centre

which attracts 18.7% of available expenditure (which has increased since 2015 by 0.4 percentage points) and then the facilities at Meols Cop at 4.5%.

**Table 4.8: Most Popular Comparison Goods Destinations within Study Area**

Study Area Destination	Comparison Goods Expenditure from Study Area Residents at 2021	Market Share of Study Area Expenditure at 2021	Comparison Goods Expenditure from Study Area Residents at 2015	Market Share of Study Area Expenditure at 2015
Southport town centre	221.1	18.7%	238.8	18.3%
Bootle town centre	30.7	2.4%	61.5	4.7%
Maghull district centre	32.8	2.4%	14.4	1.1%
Crosby district centre	22.6	1.7%	16.6	1.3%
Formby district centre	20.9	1.6%	34.9	2.7%
Waterloo district centre	7.5	0.6%	7.3	0.6%
<b>Out of Centre Facilities</b>				
Aintree Retail Parks	314.0	24.2%	228.4	17.5%
Meols Cop Retail Park	58.1	4.5%	44.8	3.4%
Asda, Ormskirk Road, Aintree	31.6	2.4%	12.8	1.0%

Source: Table 25 of Appendix IV and Table 31 of Appendix 7 of the 2015 RSR

### Clothing and Footwear

- 4.39 In reviewing the comparison shopping patterns within the Study Area, the analysis focuses on the eight separate categories of goods which fall within the 'non-bulky' and 'bulky' comparison goods sectors.
- 4.40 However, given the dominance of the clothing and footwear market and the level of expenditure which is spent on such goods (approximately 26% of residents' expenditure), we focus firstly on the clothing and footwear patterns, followed by a summary of the other seven categories below. Clothing and footwear retailing has traditionally been the bedrock of town centres' retail offer and it can therefore be a useful barometer of the popularity of high streets. Comparison goods purchases are generally made less often than convenience purchases, and residents are often willing to travel greater distances to meet their comparison shopping needs. As such, levels of zonal retention are often lower than those which are established by convenience goods.
- 4.41 Table 4.9 below sets out the proportion of clothing and footwear trips travelling to the key destinations of Southport and Bootle town centres and 'other' destinations (which include district and local centres,

along with out of centre facilities). Looking principally at the Sefton zones in the first instance, we note that approximately 70% of Zone S residents choose Southport town centre to meet their clothing and footwear shopping needs, which has reduced by two percentage points since 2015.

4.42 Other key destinations for Zone S residents include C12 Shopping Park, which attracts 4% of trips (previously 8% in 2015), and Ocean Plaza Shopping Centre which also attracts 4% of trips from Zone S residents (previously 1% in 2015). Overall, the clothing and footwear shopping trip retention in Zone S is 83% at 2020, which has reduced by two percentage points since 2015.

**Table 4.9: Clothing and Footwear Shopping Market Share Analysis by Zone (%)**

	Year	Zone S	Zone F	Zone C	Zone B	Zone M	Zone L	Zone K	Zone O	Total
Southport town centre	2015	72%	35%	13%	1%	7%	0%	1%	39%	<b>20%</b>
	2020	70%	35%	5%	1%	1%	7%	1%	42%	<b>19%</b>
Bootle town centre	2015	1%	1%	2%	18%	0%	10%	0%	0%	<b>6%</b>
	2020	0%	0%	7%	6%	3%	0%	0%	0%	<b>2%</b>
Other	2015	27%	64%	85%	81%	93%	90%	90%	39%	<b>74%</b>
	2020	30%	65%	88%	93%	96%	93%	99%	58%	<b>79%</b>

Source: Table 4.3 from Sefton RSR (2015) and Table 3 of Appendix IV

4.43 In terms of Zone F, Southport town centre attracts 35% of clothing and footwear trips, which has remained consistent since 2015. However, Liverpool city centre also attracts approximately 33% of Zone F's clothing and footwear trips, although this has decreased by five percentage points since 2015. However, Liverpool city centre remains a key destination for clothing and footwear shopping trips from each of the zones, securing 15% of Zone S residents' trips to 56% of Zone M residents' trips. We provide a comparison below in Table 4.8 of the proportion of clothing and footwear trips to Liverpool city centre from each Study Area zone, and the proportion of such trips to Aintree Retail Park.

4.44 Table 4.10 demonstrates that, across the Study Area as a whole, the market share of clothing and footwear shopping trips claimed by Liverpool city centre has reduced from 46% in 2015 to 34% in 2020, as a consequence in a reduction in such trips from Zones F, C, B, L, K and O.

4.45 The table does identify a significant increase in clothing and footwear shopping trips claimed by Aintree Retail Park (amounting to an increase of ten percentage points), with particular notable increases in market share arising in Zones F, C, B, L and K.

**Table 4.10 Liverpool City Centre and Aintree Retail Park Clothing and Footwear Shopping Market Share Analysis by Zone (%)**

	Year	Zone S	Zone F	Zone C	Zone B	Zone M	Zone L	Zone K	Zone O	Total
Aintree Retail Park	2015	0%	4%	18%	12%	29%	17%	13%	10%	<b>13%</b>
	2020	0%	15%	38%	41%	20%	54%	23%	9%	<b>23%</b>
Liverpool City Centre	2015	10%	38%	54%	57%	51%	60%	60%	31%	<b>46%</b>
	2020	15%	33%	32%	26%	56%	25%	50%	16%	<b>34%</b>

Source: Table 4.3 from Sefton RSR (2015) and Table 3 of Appendix IV

4.46 Overall, the Borough claims 55% of Study Area clothing and footwear shopping trips, which has increased by ten percentage points since 2015. As set out above, this is as a result of an increase in the attraction of the facilities at Aintree Retail Park.

#### Books, CDs and DVDs Goods

4.47 Across the Study Area as a whole, Southport town centre attracts 18% of the total shopping trips within this sector, followed by the Asda at Aintree, which secures 6% of trips. Looking outside of the Study Area, Liverpool city centre attracts 24% of all such shopping trips. In total, 53% of trips to purchase books, CDs and DVDs are to destinations in the Borough, which has increased by one percentage point since 2015.

4.48 Looking in more detail at the shopping patterns within the zones located principally within the Borough, 56% of Zone S residents choose Southport town centre to purchase books, CDs and DVDs and a further 11% choose the Tesco Extra at Meols Cop. In terms of Zone B residents, 9% choose Bootle town centre, whereas a total of 19% of such trips are directed to the Tesco superstore at Litherland.

#### Small Household Goods

4.49 Turning to small household goods shopping patterns, we note that the most popular destination across the Borough is Aintree Retail Park, which attracts 19% of such trips, followed by Southport town centre (which attracts 11% of these trips), and Switch Island Retail Park in Netherton (8% of trips). Outside of Sefton, key destinations include Liverpool city centre which attracts 13% of all trips to purchase small household goods which originate in the Study Area. The total proportion of trips attracted to the Borough's retail destinations is 64%, which has increased considerably by 17 percentage points since 2015.

4.50 The most popular destination to make small household goods purchases for Zone S residents is

Southport town centre (32%), followed by Ocean Plaza Shopping Centre (29%). For Zone B residents, the most popular destination is Aintree Retail Park (36%), followed by Switch Island Retail Park (18%). Aintree is also the most popular destination for Zone C, F and M residents (with Aintree Retail Park securing a respective market share of 42%, 18% and 16% of small household goods shopping trips originating within these zones).

#### Recreational Goods

- 4.51 Looking at shopping patterns for recreational goods across the Study Area as a whole, the most popular destination for Sefton's residents is Aintree Retail Park (which claims 20% of such trips), followed by Southport town centre (which claims 13% of trips). The total proportion of trips attracted to the Borough's retail destinations is 54%, which has increased by nine percentage points since 2015.
- 4.52 Focussing on the four central zones again, it is evident that the most popular destination for Zone S residents is Southport town centre, which attracts 51% of trips. However, for the other zones located within the Borough boundary, Aintree Retail Park is the principal destination for purchasing recreational goods. Its market share is highest in Zone B (where it secures 34% of all such trips), followed then by Zone M (27% of trips).

#### Chemist Goods

- 4.53 Turning to the final non-bulky comparison category of chemist and beauty goods, the most popular destination across the Study Area as a whole is Southport town centre (which secures 9% of such trips), followed by Aintree Retail Park (6%).
- 4.54 In total, 65% of chemist goods shopping trips originating within the Study Area are attracted to facilities within Sefton Borough, which has remained consistent since 2015. However, within Zones S, F, C and B the Borough retention rate is over 90%, which reflects the localised catchment area for purchasing such goods.
- 4.55 The top destination for purchasing chemist goods in Zone S is Southport town centre (which secures a 37% share of such trips), followed by the Tesco Extra at Meols Cop (15%). For Zone B residents, the principal destination for purchasing chemist goods is Bootle town centre (19% share of such trips), followed by Aintree Retail Park (13%).



### Electrical Goods

4.56 Looking at the first of the three bulky categories of comparison goods of electrical goods, the household survey results demonstrate that the most popular destination across the Study Area as a whole for this type of retailing is Aintree Retail Park (which attracts 44% of all trips), followed by Kew Retail Park in Southport (7%), and then Southport town centre (6%). In total, the Borough's retail facilities collectively secure 76% of all such trips, representing an increase of seven percentage points on the figure recorded at 2015.

### DIY and Gardening Goods

4.57 Aintree Retail Park (which includes a B&Q store) is the principal destination for DIY and gardening shopping trips across the Study Area. The retail park attracts a total of 40% of all DIY trips originating within the Study Area; the second most popular destination is the B&Q at Meols Cop in Southport, which attracts 16% of all such trips. In total, 84% of DIY shopping trips from Study Area residents are claimed by destinations within Sefton Borough.

4.58 The most popular destination for Zone S residents is the B&Q at Meols Cop, which secures 58% of such trips. For all other zones, the most popular facility is Aintree Retail Park, which secures more than half of all such shopping trips from Zones B (60%) and M (52%).

### Furniture Goods

4.59 Finally, turning to shopping patterns for furniture goods, the principal destination for residents across the Study Area as a whole is Aintree Retail Park (which attracts 33% of trips to buy furniture), followed by Southport town centre (which attracts 26% of trips). In total, 69% of trips from residents in the Study Area to purchase furniture goods are attracted to destinations within Sefton Borough, which represents an increase in market share of seven percentage points since 2015.

4.60 The principal destination for Zone S residents is Southport town centre, which attracts a total of 44% of furniture shopping trips. Aintree Retail Park is the most popular destination to purchase furniture goods for Zone B residents (it secures 46% of such trips within this zone) and Zone C (34%). A total of 27% of Zone F furniture shopping trips are attracted to Formby district centre.

4.61 We set out the overall Borough market share by zone for each of the eight comparison goods sub-sectors in Table 4.11 below.

**Table 4.11 Sefton Borough Comparison Retention Rates by Category and Zone**

Category	Year	Zone S	Zone F	Zone C	Zone B	Zone M	Zone L	Zone K	Zone O	Total
Clothing and footwear	2015	86%	58%	43%	36%	45%	29%	19%	53%	45%
	2020	83%	61%	63%	68%	27%	70%	32%	64%	55%
Books etc.	2015	99%	76%	47%	55%	24%	13%	18%	38%	52%
	2020	86%	74%	55%	71%	27%	47%	21%	44%	53%
Household	2015	82%	54%	54%	61%	48%	18%	38%	48%	47%
	2020	82%	83%	79%	82%	38%	73%	34%	68%	64%
Toys etc.	2015	78%	61%	59%	41%	33%	31%	23%	27%	45%
	2020	86%	45%	56%	78%	30%	48%	32%	57%	54%
Chemist	2015	98%	93%	94%	82%	80%	36%	25%	32%	65%
	2020	98%	94%	96%	90%	22%	86%	15%	48%	65%
Electrical	2015	88%	60%	59%	78%	71%	62%	58%	49%	69%
	2020	92%	83%	75%	85%	59%	82%	56%	84%	76%
DIY	2015	100%	94%	96%	98%	94%	66%	84%	73%	87%
	2020	99%	95%	98%	92%	58%	91%	80%	74%	84%
Furniture	2015	78%	73%	70%	69%	63%	49%	55%	32%	62%
	2020	85%	85%	84%	85%	47%	77%	60%	52%	69%

### Summary

4.62 The household survey results are provided in full at Appendix II. In respect of convenience goods, the findings that are of greatest relevance to the future retail and centres strategy in Sefton are as follows:

- Overall, the Sefton convenience destinations meet both main and top up food shopping requirements for Sefton residents in a satisfactory manner;
- For the most central Sefton zones (Zones S, F, C and B), more than nine of every ten main food shopping trips are undertaken to stores within Sefton Borough; for top-up shopping, Sefton's market share is about 90% for Zones S, F, C, B and M); and
- There has however been a shift in convenience goods market share from town centre facilities to out of centre facilities, and a noticeable difference in shoppers' behaviour in those zones where new out of centre discount foodstores have commenced trading since 2015.

4.63 In terms of comparison goods, our assessment has identified that:

- The vast majority of residents in central Sefton zones are able to meet their comparison goods shopping needs within the Sefton authority area (principally at Southport town centre and Aintree

Retail Park);

- The overall clothing and footwear market share claimed by Southport town centre has remained broadly consistent over the last five years at 19% now compared to 20% at 2015. However, Bootle town centre's clothing and footwear market share has declined from 6% at 2015 to 2% at 2020;
- Liverpool city centre is still drawing relatively high proportions of clothing and footwear trips away from Zones F, C, B and M in particular, although this proportion has reduced for Zones F, C and B, where Aintree Retail Park now attracts an increased proportion of trips; and
- The Borough's retention level of shopping trips has increased since 2015 for all categories of comparison goods, except chemist goods and DIY goods.

## 5.0 Healthcheck Assessments

### Introduction

- 5.1 Paragraph 85 of the NPPF indicates that planning policies should promote the long term vitality and viability of town centres by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries. The same paragraph also states that town centres should accommodate a suitable mix of uses (including housing) and provide for development that reflects a centre's distinctive character.
- 5.2 Paragraph 006 of the Town Centres PPG identifies a range of indicators that should be assessed over time in order to establish the health of a town centre. The indicators include the following:
- diversity of uses;
  - proportion of vacant street level property;
  - retailer representation and intentions to change representation;
  - pedestrian flows;
  - accessibility;
  - perception of safety and occurrence of crime;
  - the state of town centre environmental quality;
  - the balance between independent and national multiple retailers; and
  - the extent to which there is an evening and night time economy.
- 5.3 New healthcheck assessments have been undertaken for Bootle and Southport town centres, and the district centres of Crosby, Formby, Maghull and Waterloo. The assessments are based on site visits which were undertaken in October 2020, prior to the imposition of 'Tier 3' Covid-19 related restrictions<sup>26</sup> and whilst the centres were substantially 'open for business'. As such, the assessments should be taken as a 'snapshot' of the performance of each centre at a moment in time, and further issues may subsequently become apparent in each centre as a consequence of the ongoing negative impacts arising from the Covid-19 pandemic.
- 5.4 Detailed healthchecks for each of the six centres are provided at Appendix III. We provide an overview

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<sup>26</sup> Which came into effect on 14 October 2020.

of the centres' position in the retail hierarchy below, before summarising the key conclusions from our healthcheck assessments.

### Sub-Regional Retail Hierarchy

- 5.5 Table 5.1 sets out the retail hierarchy on a sub-regional basis with reference to Venuescore's UK Shopping Venue Rankings. Venuescore's index ranks nearly 3,500 retail venues in the UK (including town centres, standalone malls, retail warehousing and factory outlet centres), based on the strength of their current provision. Each retail venue is ranked with reference to the provision of multiple retailers, including anchor stores, fashion operators, and non-fashion multiples. The score attached to each operator is weighted to reflect its overall impact on shopping patterns. For example, anchor stores such as John Lewis, Marks & Spencer and Selfridges receive higher weightings.
- 5.6 Based on its score and the strength of its offer, Venuescore categorises each centre in order to identify its role. The eight categories comprise: 'Major City', 'Major Regional', 'Regional', 'Sub-Regional', 'Major District', 'District', 'Minor District' and 'Local'. The position of retail destinations in the table is derived from the 2016 Rankings; some competing centres within the sub-region are included by way of context. The Market Position Classification and Index, as set out in the below Table 5.1, provide an indication as to the market that the venue serves; the higher the index score, the more upmarket the venue is.
- 5.7 Southport is categorised as a Regional centre and scored 188 points at 2016. It ranked 100<sup>th</sup> of all UK centres surveyed in 2016, which represents a fall of seven places from its 93<sup>rd</sup> position at 2014. Whilst Southport is the only Regional centre in the authority area, Preston city centre (which is located around 28 kilometres to the north east<sup>27</sup>) is also identified as a Regional centre and benefits from being ranked in 56<sup>th</sup> position (44 places higher than Southport). Furthermore, to the south lies Liverpool city centre, which is designated as a Major City and is ranked 5<sup>th</sup> out of all UK shopping venues, in part reflecting the strength of Liverpool One shopping centre which attracts a wide range of operators, including a number of premium names.
- 5.8 Bootle town centre had a score of 91 and was ranked 297<sup>th</sup> of all UK shopping venues at 2016<sup>28</sup>. However, this represents a notable downturn from its performance in the 2014 Retail Rankings, where it achieved a score of 102 and a rank of 229<sup>th</sup>. This is a relatively substantial change in performance,

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<sup>27</sup> Measured with regard to the most direct route by road.

<sup>28</sup> The 2016 Venuescore is the most recently published version of this information

which can be attributed to the loss of some national multiple operators from The Strand Shopping Centre<sup>29</sup>. Whilst it is important to note that the loss of even one high profile national multiple operator can impact significantly on the Venuescore ranking of a small to moderate-sized town centre, we are aware that the offer in The Strand has been the subject of a decline over a number of years. Notwithstanding this, Bootle is the second highest ranked centre in the authority area and is identified as the only Sub-Regional centre in the Sefton, which reflects the importance of the centre to residents in the southern part of the Borough.

**Table 5.1: Venuescore's Sub-Regional Shopping Hierarchy**

Retail Venue	Score 2015/16	Location Grade	Rank 2010	Rank 2013/14	Rank 2015/16	Market Position Classification	Market Position Index (Average 100)
Liverpool	551	Major City	4	5	5	Upper Middle	112
Preston	238	Major Regional	53	60	56	Middle	95
Blackpool	214	Regional	91	86	74	Middle	94
<b>Southport</b>	<b>188</b>	<b>Regional</b>	<b>107</b>	<b>93</b>	<b>100</b>	<b>Middle</b>	<b>99</b>
Wigan	184	Regional	101	109	109	Middle	92
<b>Bootle</b>	<b>91</b>	<b>Sub-Regional</b>	<b>243</b>	<b>229</b>	<b>297</b>	<b>Lower Middle</b>	<b>78</b>
Ormskirk	67	Major District	372	405	429	Middle	91
<b>Aintree Retail Park</b>	<b>64</b>	<b>Major District</b>	<b>461</b>	<b>522</b>	<b>453</b>	<b>Middle</b>	<b>104</b>
<b>Formby</b>	<b>42</b>	<b>District</b>	<b>727</b>	<b>752</b>	<b>735</b>	<b>Middle</b>	<b>104</b>
<b>Central 12 Shopping Park, Southport</b>	<b>31</b>	<b>District</b>	<b>941</b>	<b>1,061</b>	<b>1,047</b>	<b>Middle</b>	<b>109</b>
<b>Maghull</b>	<b>28</b>	<b>Minor District</b>	<b>986</b>	<b>1,061</b>	<b>1,151</b>	<b>Lower Middle</b>	<b>86</b>
<b>Crosby</b>	<b>23</b>	<b>Minor District</b>	<b>1,183</b>	<b>1,155</b>	<b>1,372</b>	<b>Lower Middle</b>	<b>89</b>
<b>Kew Retail Park</b>	<b>23</b>	<b>Minor District</b>	<b>1,493</b>	<b>1,383</b>	<b>1,372</b>	<b>Middle</b>	<b>93</b>
<b>Aintree</b>	<b>22</b>	<b>Minor District</b>	<b>1,306</b>	<b>1,452</b>	<b>1,429</b>	<b>Lower Middle</b>	<b>79</b>
<b>Waterloo</b>	<b>19</b>	<b>Local</b>	<b>1,414</b>	<b>1,524</b>	<b>1,618</b>	<b>Lower Middle</b>	<b>89</b>
<b>Meols Cop Retail Park, Southport</b>	<b>18</b>	<b>Local</b>	<b>1,493</b>	<b>1,383</b>	<b>1,709</b>	<b>Lower Middle</b>	<b>86</b>
<b>Ocean Plaza Shopping Park, Southport</b>	<b>18</b>	<b>Local</b>	<b>1,499</b>	<b>1,452</b>	<b>1,709</b>	<b>Middle</b>	<b>96</b>

Source: Venuescore UK Shopping Venue Rankings 2010, 2013/14 and 2015/16

Note: Bold denotes

5.9 Of the district centres, Formby has the highest ranking (735<sup>th</sup> position) and is categorised as a District centre. It is then followed by Maghull (1,151<sup>st</sup> position) and Crosby (1,372<sup>nd</sup> position), both of which are classified as Minor District centres, and then by Waterloo (1,618<sup>th</sup> position), which is classified as a Local

<sup>29</sup> Including the Tesco Metro store which closed at the start of April 2015.

centre. Whilst the performance of Formby has improved slightly in the period to 2016, the rank of Maghull, Crosby and Waterloo slipped between 2010 and 2016.

- 5.10 The contribution made by the Borough's retail parks is reflected by their appearance in the Venuescore rankings. In particular, we note that Aintree Retail Park is the third highest ranked retail venue in the Borough (ranked 453<sup>rd</sup> out of all UK shopping venues), and that it has bucked the general trend in the area with a slight improvement in its ranking since 2010 (when it was ranked 461<sup>st</sup>).

### Southport Town Centre

- 5.11 Southport town centre is located around 30 kilometres from Liverpool and Southport, and is the principal retail centre in Sefton. It has a dual role, meeting residents' convenience, comparison and service needs, and also catering for tourists. Southport came to prominence as a seaside resort, and tourism still accounts for significant proportion of the local economy.
- 5.12 The primary shopping areas are pedestrianised, and the environmental quality of the town centre is generally good, partly due to the high quality examples of Victorian architecture. However, the variable maintenance of canopies on Lord Street detracts from the grandeur of the street, as do a number of lower quality shop/business frontages.
- 5.13 Southport's role and function is reflected in its composition. The single most prevalent use is comparison goods retail, which accounted for 199 units and very nearly 45,000 sq.m of floorspace at October 2020 (equating to 28.8% of all commercial units and 26.3% of all floorspace). However, the comparison goods offer has reduced considerably since May 2015 (when 35.7% of units and 38.2% of floorspace was in comparison goods use), largely due to the closure of BHS, Debenhams and Beales. Whilst such a reduction in the offer is clearly a symptom of wider structural issues in the comparison retail sector, the change is stark and undoubtedly has a bearing on the attractiveness of the town as a shopping venue. It will be important to try and attract new uses to vacant comparison goods units, which should include quality, modern retailers. The sector will remain extremely important going forward in drawing custom into the town.
- 5.14 There is a substantial level of convenience goods provision (even for a relatively large town centre), which reflects the presence of the Morrisons superstore at Winter Gardens, the Sainsbury's at Lord Street, and the Lidl at Virginia Street.

- 5.15 The number of service uses (and the variation in the offer) reflects Southport’s dual role in meeting the needs of residents and tourists, with the latter group clearly being of particular importance during the summer months.
- 5.16 Table 5.2 provides an overview of the composition of Southport town centre.

**Table 5.2: Southport Town Centre Unit Composition at October 2020**

	Convenience	Comparison	Retail Services	Leisure Services	Financial & Business Services	Vacant	Total
Southport	7.0%	26.3%	13.9%	25.1%	7.3%	20.5%	757
National average	9.2%	28.2%	15.4%	24.5%	9.5%	13.0%	-

Source: Composition of Town Centre derived from Nexus Planning survey of October 2020 using Experian Goad survey area, Goad averages at October 2020

- 5.17 Our survey identified that 20.5% of units in the centre are vacant, which is higher than the national average rate of 12.0%. In addition, 18.8% of commercial floorspace was vacant in Southport town centre at October 2020. Whilst the vacant units are distributed throughout the town centre, there is a notable concentration along Lord Street, including the former Beales and Debenhams units. In addition, a number of higher profile units on Chapel Street remain vacant, including the former BHS and H&M units. Not only are these large units in prominent locations, they were all key comparison goods anchors which provided a reason to choose to visit Southport over other centres.
- 5.18 Such large vacant units have subsequently proven difficult to let, which is both reflective of the lack of demand in the retail sector and the nature of the accommodation, which is somewhat dated and arranged over a number of floors. Southport’s vacancy rate, both in respect of the number of vacant units and the quantum of floorspace, is above national average level and is a real cause for concern.
- 5.19 At the end of October 2020, Sefton Council submitted a bid for £50 million of funding from the Government’s Towns Fund. Two proposals, including a revamp of Southport Market (work on which started in October 2020) and the creation of the Southport Cove water park and surfing lake, have already secured funding from various sources. Other projects include a new convention and events centre, the regeneration of Lord Street, a business incubator space and a revamp of Southport Pleasureland. Additionally, in November 2020, plans for circa 28,000 sq.m of new public spaces in the



town centre and waterfront, and improved pedestrian and cycling routes were unveiled<sup>30</sup>.

### Bootle Town Centre

- 5.20 Bootle town centre is located approximately 5 kilometres to the north of Liverpool city centre, and is dominated by The Strand Shopping Centre, which accommodates a large proportion of the centre’s retail offer. Whilst this allows some of Bootle’s key anchors to be located in close proximity to one another, the centre is somewhat inward facing as a consequence.
- 5.21 The composition of Bootle is relatively typical for a centre of its size, with a good mixture of retail, service and other main town centre uses. Experian Goad’s definition of the centre encompasses both the Asda superstore at Strand Road and the Lidl at Marsh Lane, which are a relatively short walk from The Strand and therefore offer some potential to support some linked trips to facilities within the centre.
- 5.22 Table 5.3 provides an overview of the composition of Bootle town centre.

**Table 5.3: Bootle Town Centre Unit Composition at October 2020**

	Convenience	Comparison	Retail Services	Leisure Services	Financial & Business Services	Vacant	Total
Southport	8.1%	30.3%	15.2%	14.6%	8.6%	23.2%	198
National average	9.2%	28.2%	15.4%	24.5%	9.5%	13.0%	-

Source: Composition of Town Centre derived from Nexus Planning survey of October 2020 using Experian Goad survey area, Goad averages at October 2020

- 5.23 Our survey recorded 8,950 sq.m of vacant floorspace in the centre, across 46 units, which equates to 17.6% of the stock of floorspace and 23.2% of the total number of commercial units. Whilst vacant units are located throughout Bootle town centre, there is a particular concentration of vacancies within The Strand Shopping Centre (notably on the ground floor).
- 5.24 Whilst The Strand Shopping Centre is somewhat of its time (and would benefit from additional updating), its managed environment helps Bootle to perform at least moderately well in respect of its environmental quality, accessibility, and the perception of safety. The majority of traditional units on Stanley Road are reasonably well maintained and relatively recent planting and public realm improvements, and a number of new developments, also add to quality of the environment. However,

<sup>30</sup> As reported in the article headlined ‘Southport details public real revamp’, Place North West, 23 November 2020.

in our view, Bootle town centre, both in respect of its offer and its environment, would benefit from further modernisation and investment.

- 5.25 Sefton Council acquired The Strand Shopping Centre in 2017, and is proceeding with ambitious regeneration plans. To this end, we note that £1 million investment from the Liverpool City Region Combined Authority was secured in December 2019, and a further £650,000 funding from the Combined Authority was announced in October 2020. The former Post Office site in Stanley Road has now been acquired by the Council, along with the Easirent van hire premises on Washington Road<sup>31</sup>. Whilst engagement work is underway, unused areas in and around The Strand could be used for food and drink, pop-up markets, artists' studios and craft workshops, alongside education and training facilities and performance spaces.
- 5.26 However, due to impacts resulting from the effects of Covid-19 and the associated lockdown measures, Sefton Council announced in February 2021 that the redevelopment of The Strand Shopping Centre has been delayed. No alternate timescale for the redevelopment of the centre has been given at this time<sup>32</sup>.
- 5.27 Notwithstanding this delay, the emerging plans for The Strand Shopping Centre should help to address the need to attract additional uses into the centre and reduce the vacancy rate in order to improve its vitality and viability.

### District Centres

- 5.28 The composition of each of the four district centres is provided in Table 5.4 below. With the exception of Waterloo, which is the largest district centre by Experian Goad survey area in the authority area, Sefton's district centres display vacancies rates lower than the UK average of 13.0% of units (as identified by Experian Goad at October 2020).

<sup>31</sup> Planning application reference DC/2020/01579 for prior notification application for the demolition of the former Bootle New Strand Post Office and the former Easirent depot, approved September 2020.

<sup>32</sup> As reported in the article headlined 'Bootle Strand overhaul delayed due to Covid', Place North West, 2 February 2021.

**Table 5.4: District Centre Unit Composition at October 2020**

District centre	Convenience	Comparison	Retail Services	Leisure Services	Financial & Business Services	Vacant	Total
Crosby	11.9%	21.4%	21.4%	25.4%	8.7%	11.1%	126
Formby	8.6%	30.5%	21.1%	21.1%	8.6%	10.2%	128
Maghull	9.3%	23.3%	25.6%	16.3%	14.0%	11.6%	86
Waterloo	8.7%	24.8%	18.7%	29.1%	5.2%	13.5%	230
National average	9.2%	28.2%	15.4%	24.5%	9.5%	13.0%	-

Source: Composition of Town Centre derived from Nexus Planning survey of October 2020 using Experian Goad survey area, Goad averages at October 2020

### Crosby District Centre

- 5.29 Crosby district centre is located in the south of Sefton, approximately 5 kilometres to the north of Bootle town centre. As a smaller centre, Crosby has a relatively modest comparison goods offer. However, Crosby’s convenience goods offer is relatively strong and is focused around the Sainsbury’s and Farmfoods foodstores. Crosby’s retail offer is considered appropriate to a district centre and is sufficient to meet most day to day needs of residents. The strength of the service sector is considered to be one of Crosby district centre’s key attributes, with a diverse range of service operators within the centre. The proportion of commercial units which are vacant is less than the national average level as a consequence of the vacancy rate reducing in Crosby in recent years. This can be partly attributed to St Modwen’s interests – including the Glenn Buildings – becoming substantially let.
- 5.30 Whilst the vacancy rate may be affected by the ongoing impact of the Covid-19 pandemic, the reduction in the vacancy rate is an encouraging sign. Whilst a number of large vacant plots remain and do detract from the overall environmental quality of the centre, we note that there has been some recent development interest in these sites<sup>33</sup>.
- 5.31 Pedestrian flows in the centre are concentrated along the pedestrianised area of Moor Lane, between Liverpool Road and the access to the Cooksland car park, off Moor Lane. The majority of retail and service units are located around the pedestrianised area of Liverpool Road and Moor Lane. The pedestrianised nature of the centre ensures that Crosby has a high environmental quality and a good level of safety for users.

<sup>33</sup> Planning application reference DC/2020/00734 sought to provide for the erection of two commercial units and 39 apartments with associated parking at the former Central Buildings site on Church Road, but was refused in November 2020.

### Formby District Centre

- 5.32 Formby is located in the central part of the Borough, approximately 12 kilometres to the south of Southport and 15 kilometres to the north of Bootle. Formby has a high standard of environmental quality and high levels of pedestrian activity throughout the centre. Considering its position in the retail hierarchy, Formby has a relatively strong comparison goods offer. However, the amount of charity shops in the centre is unusually high and the centre may benefit from securing more some additional 'higher end' comparison goods retailers. Formby has a varied and strong service offer, which encourages linked trips and helps to underpin its district centre role.
- 5.33 Whilst the Formby vacancy rate is lower than the national average level, it has increased substantially in recent years (it has historically been very low). In this regard, we note that the Pizza Express at Chapel Lane had closed permanently by the time of our October 2020 survey, and shortly after (in November 2020) the closure of Edinburgh Woollen Mill at Brows Lane was confirmed. The increase in Formby's vacancy rate has been relatively rapid and it will be important to try and safeguard against further losses wherever possible.

### Maghull District Centre

- 5.34 The smallest district centre in Sefton, Maghull district centre is located around 9 kilometres to the north east of Bootle, in close proximity to the M57 and M58 motorways. The district centre has a good level of convenience goods and service provision, reflecting its role at the centre of the surrounding community. The Morrisons foodstore at Stafford Moreton Way helps anchor the centre, as do a number of national multiple household comparison goods retailers, namely B&M and Home Bargains. These retailers occupy relatively large units, which means that comparison goods floorspace accounts for around a third of all floorspace in the centre.
- 5.35 As of October 2020, the Central Square area of Maghull is undergoing improvements pursuant to planning application reference DC/2016/00268. Alongside alterations to a number of units, this will result in the reconfiguration of the existing car park thereby creating an additional 23 spaces. During our visit, pedestrian activity was strongest around Central Square (to the north of the A5147 Westway) and Morrisons (to the south). The centre is effectively bisected by the A5147 and consideration should be given to any future opportunities to better integrate the two elements in order to help encourage linked trips.

### Waterloo District Centre

- 5.36 Waterloo district centre is located 2 kilometres to the south of Crosby and is the largest district centre in Sefton in terms of number of units. The centre has a good range of convenience, comparison and service provision, which is considered sufficient to serve the needs of the surrounding community. The Co-operative foodstore and Iceland are of particular importance in anchoring the centre, and the convenience and comparison goods retail offer is generally more varied and diverse than that found at other district centres in the Borough. Waterloo also benefits from a strong service offer. Whilst Waterloo is the only district centre in Sefton in which the vacancy rate was in excess of the national average at October 2020, this may be a consequence of the large number of units present within the centre.
- 5.37 Waterloo is located adjacent to a railway station. It is the only district centre in Sefton which accommodates both a railway station and bus interchange, which means that it benefits from a high level of accessibility.
- 5.38 The centre is considered to provide an appropriate mix of facilities to meet day to day needs, with a particular focus on retail and leisure service uses. Whilst the vacancy rate is not substantially greater than the national average figure, it has increased in recent years and it will be important to ensure that the centre does not slip further in this regard in order to ensure its future vitality and viability. Notwithstanding the vacancy rate, a good level of pedestrian activity was observed during our visit.

## 6.0 Population and Expenditure

### Study Area and Survey

- 6.1 In September 2020, a survey of 1,000 households was undertaken by NEMS within the defined Study Area in order to ascertain where residents go to undertake a range of shopping and leisure activities. The defined Study Area is consistent with that used in undertaking the 2015 Sefton RSR (as well as earlier iterations of the RSR). The Study Area reflects the area where residents look to facilities within Sefton Borough to help meet their retail and leisure needs. A plan of the Study Area is provided as Appendix I.
- 6.2 The defined Study Area has been broken down into eight separate zones (in a manner which is also consistent with the 2015 RSR) based on postcode sectors. The eight zones are considered to be representative of geographic areas that may accommodate broadly similar patterns of shopping behaviour. The below Table 6.1 identifies the postcode sectors which define each of the zones.

**Table 6.1: Study Area Zones by Postcode Sector**

Survey Zone	Postcode Sectors
S	PR8 1, PR8 2, PR8 3, PR8 4, PR8 5, PR8 6, PR9 0, PR9 7, PR9 9
F	L37 0, L37 1, L37 2, L37 3, L37 4, L37 6, L37 8, L38 8, L37 7, L38 7
C	L22 0, L22 1, L22 2, L22 3, L22 4, L22 5, L22 6, L22 7, L22 8, L22 9, L23 0, L23 1, L23 2, L23 3, L23 4, L23 5, L23 6, L23 7, L23 8, L23 9, L38 0, L38 3, L38 9
B	L20 0, L20 1, L20 3, L20 4, L20 5, L20 6, L20 7, L20 9, L21 0, L21 1, L21 2, L21 3, L21 4, L21 5, L21 6, L21 7, L21 8, L21 9, L30 1, L30 2, L30 3, L30 4, L30 5, L30 6, L30 7, L30 8, L30 9, L29 1, L30 0, L68 0, L69 9, L71 2, L70 1, L72 0, L72 1, L72 8, L75 1, L75 2
M	L10 0, L10 2, L10 3, L10 6, L10 8, L29 3, L29 5, L29 6, L29 7, L29 8, L29 9, L31 0, L31 1, L31 2, L31 3, L31 4, L31 5, L31 6, L31 7, L31 8, L31 9, L38 4, L38 5, L38 6
NL	L10 1, L10 5, L10 7, L10 9, L11 0, L11 1, L11 2, L11 3, L11 4, L11 5, L11 6, L11 7, L11 8, L11 9, L20 2, L20 8, L4 0, L4 1, L4 2, L4 3, L4 4, L4 5, L4 6, L4 7, L4 8, L4 9, L5 0, L5 1, L5 2, L5 3, L5 4, L5 5, L5 6, L5 7, L5 8, L5 9, L9 0, L9 1, L9 2, L9 3, L9 4, L9 5, L9 6, L9 7, L9 8, L9 9, L67 1
K	L10 4, L32 0, L32 1, L32 2, L32 3, L32 4, L32 5, L32 6, L32 7, L32 8, L32 9, L33 0, L33 1, L33 2, L33 5, L33 6, L33 7, L33 8, L33 9, L70 2
O	L33 3, L33 4, L37 5, L37 9, L38 1, L39 0, L39 1, L39 2, L39 3, L39 4, L39 5, L39 6, L39 7, L39 8, L39 9, L40 8, L40 9, PR9 8

- 6.3 The zones were used as the basis for the NEMS household survey, which is used to inform our assessment of shopping patterns as set out at Section 4 of this report. The survey results also underpin the quantitative retail capacity assessment which follows at Section 7. However, in order to consider

the flow of expenditure to retail destinations, it is first necessary to estimate the population and future convenience and comparison goods expenditure apparent in the Study Area.

- 6.4 The Sefton authority area broadly corresponds to Zones S, C, F, B and M; Zone NL broadly covers the northern parts of Liverpool; Zone O broadly covers the western part of West Lancashire; and, Zone K covers the western part of Knowsley district around Kirkby.

### Study Area Population

- 6.5 The population within each postcode sector and each zone at 2021 has been calculated using Experian Micromarketer G3 data<sup>34</sup>. Future estimations in respect of population growth to 2031 have also been derived from Experian data. The quantitative assessment which is set out in the following Section 7 of this report is derived from the Excel model provided as Appendix IV.
- 6.6 Table 6.2 below sets out Experian’s population projections for each zone in the Study Area for reporting years 2021, 2026 and 2031.

**Table 6.2 Estimated Study Area Population by Survey Zone**

Zone	2021	2026	2031
S	87,943	88,564	89,053
F	23,596	23,782	23,809
C	46,812	47,089	47,333
B	78,019	79,208	80,480
M	38,092	38,237	38,400
NL	133,163	136,481	139,902
K	39,213	39,988	40,656
O	49,470	49,830	50,204
<b>Total</b>	<b>496,308</b>	<b>503,179</b>	<b>509,837</b>

Source: Table 1 of Appendix IV

- 6.7 The above table sets out our estimate that the Study Area population will increase from 496,308 persons at 2021 to 509,837 persons at 2031, which is an increase of 13,529 persons over the 10-year period (which equates to a 2.7% increase).

<sup>34</sup> Which was sourced in January 2021 in order to provide the most up to date position in respect of population and expenditure.

## Retail Expenditure

- 6.8 In order to calculate per capita convenience and comparison goods expenditure, we have again utilised Experian Micromarketer G3 data, which provides detailed information on local consumer expenditure which takes into consideration the socio-economic characteristics of the local population.
- 6.9 The base year for the Experian expenditure data is 2019. Our methodology takes account of the fact that some special forms of trading expenditure<sup>35</sup> is not available to support retail floorspace, and then allows for increases in per capita expenditure growth on an annual basis.
- 6.10 Figure 5 of Appendix 3 of Experian Retail Planner Briefing Note 18 ('ERPBN18') (October 2020) provides forecasts in respect of the proportion of convenience and comparison goods expenditure that will be committed through special forms of trading both now and in the future. We have 'stripped out' any survey responses which relate to expenditure committed via special forms of trading from the dataset and have instead made an allowance derived from Experian's recommendations (which we consider to be the most appropriate means by which to account for such expenditure).
- 6.11 In considering special forms of trading, it should be noted that many products which are ordered online are actually sourced from a store's shelves or stockroom (particularly in the case of convenience goods). As such, expenditure committed in this manner acts to sustain shops and can be considered 'available' to support floorspace within the Study Area. Accordingly, in order not to overstate the influence of special forms of trading on retailers, our methodology utilises Experian's 'adjusted' allowance for special forms of trading (which is provided at Figure 5 of ERPBN18). This allowance indicates that 4.2% of convenience goods expenditure and 17.5% of comparison goods expenditure is 'lost' from shops at base year 2019 through special forms of trading purchases.
- 6.12 Having made allowance for special forms of trading, we then take account of projected changes in expenditure in accordance with the recommendations provided by Figure 6 of Appendix 3 of ERPBN18. Experian provides overall growth rates and 'adjusted' rates, which account for any additional increases in expenditure lost to special forms of trading. We set out Experian's expenditure growth estimates below in Table 6.3.
- 6.13 The latest growth rates suggest that changes in shopping behaviour associated with Covid-19 will likely

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<sup>35</sup> Identified as comprising sales via the internet, mail order, stalls and markets, door-to-door and telephone sales (i.e. all expenditure not available to traditional retail floorspace).



influence per capita expenditure growth in the short term, but that growth in comparison goods expenditure should pick up in the medium term as confidence in the economy returns. This assumes that effective treatments are in place by mid-year 2021 and that Government measures successfully limit the fallout on jobs and business failures. The outlook is different in respect of convenience goods, with substantial short term growth apparent in 2020, as a consequence of ‘stockpiling’ in the early part of the year and additional meals being consumed at home whilst there are restrictions on travel and behaviour. Thereafter, Experian assumes that this additional convenience goods spending will be reversed when greater normality returns and that shoppers will continue to embrace discount foodstores in order to secure good value going forward.

**Table 6.3: Experian Retail Planner Briefing Note 15 Convenience and Comparison Goods Annual Per Capita Growth Rates**

Year	Convenience Goods	Convenience Goods 'Adjusted SFT'	Comparison Goods	Comparison Goods 'Adjusted SFT'
2020	8.4	6.1	-8.5	-14.5
2021	-6.2	-5.3	6.5	8.1
2022	0.2	0.2	3.8	2.9
2023	0.0	-0.3	3.6	2.7
2024	0.1	-0.2	2.9	2.0
2025	0.1	-0.1	2.8	1.9
2026	0.0	-0.2	2.9	2.0
2027	-0.1	-0.2	2.9	2.1
2028	0.0	-0.1	2.8	2.3
2029	0.0	-0.1	2.9	2.4
2030	-0.1	-0.2	2.9	2.5
2031	0.0	-0.1	2.9	2.5

Source: Figure 6 of Appendix 3, Experian Retail Planner Briefing Note 18 (December 2020)

- 6.14 For convenience goods, Experian estimates annual per capita growth of 8.4% in 2020, followed by a 6.2% contraction in per capita expenditure. Experian then forecasts very limited per capita growth across the remainder period to 2031. The position is even more pessimistic when account is taken of future growth in special forms of trading, with Experian’s forecasts suggesting that there will be a very small reduction in annual convenience goods expenditure per capita in every year between 2023 and 2031. Overall, it is evident that per capita convenience goods expenditure is forecast to remain very similar across the entire period 2020 to 2031.
- 6.15 The position in respect of comparison goods expenditure is more positive. Experian forecasts that per

capita comparison goods expenditure growth will recover from a decline of 8.5% at 2020 to grow by 6.5% at 2021 and 3.8% at 2022, thereafter remaining at 2.8% or 2.9% per annum in the period from 2023 to 2031. Experian's forecast suggests that there will be relatively healthy growth in comparison goods even after accounting for expenditure lost to special forms of trading.

- 6.16 Growth in expenditure forecasts in the longer term (beyond the next ten years) should be treated with caution given the inherent uncertainties associated with predicting the performance of the economy over time (particularly in the current economic, health and political climates). As such, quantitative capacity assessments of this nature should be reviewed on a regular basis in order to ensure that forecasts over the medium and longer term reflect changing circumstances.
- 6.17 In this regard, we note that paragraph 85 of the revised NPPF requires local planning authorities to consider likely needs '**...looking at least ten years ahead**', which differs from the previous requirement to meet needs across the entire plan period. We believe that this change directly reflects current economic conditions and changes in the retail sector in recent years. In our view, the ten year timeframe is appropriate for the purposes of this RSR.
- 6.18 By applying Experian's recommendations in respect of special forms of trading and expenditure growth, we are able to produce expenditure estimates for each survey zone and the Study Area as a whole at 2021, 2026 and 2031.

### Convenience Goods Expenditure

- 6.19 Taking into account the Study Area resident population and the available per capita convenience goods expenditure, we estimate that £1,071.1m<sup>36</sup> of convenience goods expenditure originates within the Study Area at 2021. The below Table 6.4 indicates that available Study Area convenience goods expenditure is forecast to increase slightly to £1,085.5m at 2031. The increase in available convenience goods expenditure can be attributed to the estimated growth in population over these ten years.

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<sup>36</sup> In 2019 prices, as is every subsequent monetary reference.

**Table 6.4: Total Available Study Area Convenience Goods Expenditure**

2021 (£m)	2026 (£m)	2031 (£m)
1,071.1	1,079.1	1,085.5

Source: Table 2a of Appendix IV  
In 2019 prices

- 6.20 Table 6.5 indicates that this represents a modest increase of £14.4m (or 1.3%) across the Study Area between 2021 and 2031. Given the static growth in per capita expenditure, this modest increase can be attributed to projected growth in the Study Area’s population over the next decade.

**Table 6.5: Growth in Available Study Area Convenience Goods Expenditure**

Growth 2021-26 (£m)	Growth 2021-31 (£m)
8.0	14.4

Source: Table 2a of Appendix IV  
In 2019 prices

- 6.21 We have assumed that around 75% of available convenience goods expenditure would take the form of main food shopping and that around 25% would take the form of top-up shopping (which relates to smaller purchases, often including staple items such as milk and bread)<sup>37</sup>. By applying this ratio, we estimate that main food shopping trips account for £803.3m of Study Area convenience goods expenditure at 2021, and top-up shopping trips account for £267.8m.

### Comparison Goods Expenditure

- 6.22 For comparison goods, Table 6.6 sets out our estimate that the resident population of the Study Area will generate £1,295.3m of comparison goods expenditure at 2021. Available comparison goods expenditure is then forecast to grow relatively substantially to £1,671.1m at 2031. As identified at Table 6.7, this represents a substantial increase of £375.8m (or 29.0%) between 2021 and 2031. The majority of this growth is forecast to occur in the medium to longer term (i.e. after 2026).

**Table 6.6: Total Available Study Area Comparison Goods Expenditure**

2021 (£m)	2026 (£m)	2031 (£m)
1,295.3	1,469.6	1,671.1

Source: Table 8 of Appendix IV  
In 2019 prices

<sup>37</sup> This is based on Nexus Planning judgement and is broadly consistent with assumptions used elsewhere in undertaking such an exercise.

6.23 The identified increase in comparison goods expenditure growth is relatively significant, but it represents a level of annual growth that is more circumspect than that which has been achieved in the past. This is due to both a reduction in the overall level of growth when compared to that achieved in the early part of this millennium and as a consequence of further forecast increases in expenditure committed via special forms of trading (most obviously, internet shopping).

**Table 6.7: Growth in Available Study Area Comparison Goods Expenditure**

Growth 2021-26 (£m)	Growth 2021-31 (£m)
174.3	375.8

Source: Table 8 of Appendix IV  
In 2019 prices

6.24 We sub-divide comparison goods expenditure into eight categories, these being: 'DIY', 'Electrical' and 'Furniture' (collectively referred to as bulky goods); and, 'Clothing and Footwear', 'CDs, DVDs and Books', 'Health, Beauty and Chemist Goods', 'Small Household Goods', and 'Toys, Games, Bicycles and Recreational Goods' (collectively referred to as non-bulky goods). The proportion of expenditure directed to each sub-category is estimated by Experian on a zonal basis. Experian's estimates are reflected in the detailed expenditure tables set out at Table 7b of the 2021 Nexus Planning Quantitative Needs Assessment.

6.25 In considering expenditure growth, it should be noted that not all growth arising within the Study Area will be to support additional floorspace. Instead, account needs to be taken of: the market share of expenditure secured by retailers within the Borough; the claim made by existing retailers on expenditure growth (the future efficiency of retail floorspace); and, the expenditure that will be claimed by committed retail developments. We consider the matter of expenditure growth and future floorspace requirements in the following Section 7 of this report.

## 7.0 Retail Capacity

7.1 Our retail capacity tables set out our step-by-step approach to estimating the expenditure surplus which is available to support additional retail floorspace and are provided at Appendix IV. A summary of our methodological approach, together with our findings, is provided below.

### General Approach to Estimating Quantitative Capacity

7.2 Retail capacity modelling follows the basic principle that: *Available Expenditure* minus *Expected Turnover of Existing and Committed Floorspace* equals *Expenditure Surplus or Deficit*. An identified quantitative expenditure surplus indicates that there may be capacity to support additional retail floorspace (subject to there being no unacceptable impacts arising as a consequence of the increased provision). We summarise the key considerations relating to each component of the equation below.

#### Available Expenditure

7.3 As we set out in Section 5 of this report, available expenditure within a zone is calculated by multiplying the population at a given reporting year by the estimated per capita expenditure. The available expenditure takes into consideration:

- estimated population growth;
- forecast increases in per capita expenditure; and
- forecast increases in special forms of trading.

#### Anticipated Turnover of Sefton's Retail Floorspace

7.4 The turnover relates to the expenditure required by existing retailers (and by retail commitments benefitting from an extant planning permission) to ensure that they trade viably. For convenience goods retailers, the expected 'benchmark' turnover of existing convenience goods facilities is calculated with reference to GlobalData Convenience and Comparison Goods Sales Densities of Major Grocers and Mintel Retail Rankings data<sup>38</sup>.

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<sup>38</sup> These datasets provide independent analysis of key grocery retailers' declared turnover and the overall floorspace in their portfolio in order to calculate national average sales densities.

### Surplus/Deficit

- 7.5 The expenditure surplus (or deficit) is calculated by subtracting the turnover of existing and committed floorspace from the available expenditure in the Sefton authority area. A surplus figure effectively represents an under-provision of retail facilities within the Borough (which may indicate that additional floorspace could be supported), whereas a deficit would suggest a quantitative over-provision of retail floorspace.
- 7.6 Although a surplus is presented as a monetary figure, it can be converted to a floorspace requirement through the application of an appropriate sales density. In this regard, the floorspace requirement will vary according to operator and the likely sales density they could achieve. For example, in the case of comparison goods, non-bulky goods retailers tend to achieve higher sales densities than bulky goods retailers. However, within the bulky goods sector itself there is significant variation, with electrical retailers typically having higher sales densities than DIY or furniture retailers.
- 7.7 The turnover of destinations is generally considered with reference to retailers' net sales areas and all of the following floorspace figures relate to net sales areas. Our assessment considers convenience and comparison goods needs on a Borough-wide basis, but then subdivides the identified requirement in order to provide figures for North and South Sefton<sup>39</sup>.

### **Future Quantitative Convenience Goods Capacity**

- 7.8 In order to identify the likely need for additional convenience goods floorspace in Sefton Borough, it is first necessary to consider the performance of the current provision. In this respect, the built up areas of Sefton already accommodate a variety of foodstore operators. As such, we believe that many of the food shopping trips which originate within the Study Area, but are directed to facilities outside of Sefton Borough, occur principally because the trip is convenient (i.e. close to home or work), rather than due to any significant deficiencies in Sefton's offer. Consideration of convenience goods shopping patterns on a zone-by-zone basis does not suggest that there is a significant problem with shoppers driving significant distances outside the Borough to access convenience goods shopping facilities. Given this,

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<sup>39</sup> North Sefton equates to that part of the authority area which is located within Zones F and S, and South Sefton equates to that part of the authority area located within Zones B, C, L and M.

we believe that the Sefton's existing convenience goods market share of 64.5% of Study Area convenience goods expenditure is broadly appropriate and could be sustained in the future.

7.9 Based on the existing market share, we estimate that £690.4m of convenience goods expenditure which originates within the Study Area will be claimed by retailers in Sefton at 2021. For each convenience goods retail destination, consideration has been given as to whether any of its turnover is likely to be derived as 'inflow' from outside the Study Area.

7.10 In this regard, paragraph 7.10 of the 2015 RSR set out that Study's approach in respect of inflow. It states that:

**'For each convenience goods retail destination, consideration has been given as to whether any turnover is likely to be derived as 'inflow' from outside the Study Area. Given the strong tourist economy of Sefton, we have assumed 10% inflow for stores in and the edge of Southport town centre, and 5% inflow for stores in Formby and Crosby district centres. For all other stores within Sefton, recognising that the Study Area is drawn over a wide geographical area and the stores' relatively central location within it, it has been assumed that all of the store's turnover will derive from within the Study Area.'**

7.11 The above assumptions are derived from the findings of Sefton's STEAM<sup>40</sup> Trend Report for 2009 to 2014, and were broadly accepted by the Inspector in considering the called-in application for a Sainsbury's superstore at Meols Cop in Southport<sup>41</sup>. We have reviewed the inflow assumptions utilised in the 2015 RSR in the context of the latest Sefton STEAM Trend Report for 2009-2017, and believe that they remain robust. As such, we continue to apply them for the purpose of this quantitative assessment.

7.12 In total, assumed inflow accounts for £13.0m of convenience goods expenditure, which equates to 1.8% of the overall turnover of Sefton's convenience goods floorspace. This takes the total turnover of such facilities to £703.4m at 2021. We set out all our detailed assumptions in respect of inflow at Table 5 of Appendix IV.

7.13 For each convenience goods retail destination, the identified survey derived turnover is compared its expected benchmark performance (which is estimated with reference to company average sales densities and the estimated net sales areas of individual shops). Our assessment assumes a 'goods

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<sup>40</sup> This being the Scarborough Tourism Economic Activity Monitor.

<sup>41</sup> Paragraph 356 of the Inspector's report which considered the Meols Cop proposal (PINS reference APP/M4320/V/15/3002637).

based' approach, which disaggregates expenditure by sector, as it is important to recognise that major foodstore operators generally also sell some comparison goods, such as clothing, household goods, books and CDs. To account for this, the typical split between convenience and comparison goods provision for each operator has been identified<sup>42</sup> and this multiplier has been applied to the estimated net floorspace<sup>43</sup> of each foodstore. This provides an indication of the likely floorspace dedicated to the sale of convenience goods at each store and provides for an accurate estimation of convenience goods benchmark turnover.

- 7.14 The calculation of the estimated benchmark turnover of individual stores allows an assessment to be made in respect of individual retailers' trading performance and whether (on an aggregated basis) surplus expenditure exists to support additional floorspace. For smaller shops (where it is more difficult to collate accurate floorspace and sales density data), we assume that stores are trading 'in equilibrium' (i.e. the survey-derived turnover equates to the anticipated benchmark turnover).
- 7.15 Our assessment is summarised below at Table 7.1 and identifies that convenience goods floorspace in Sefton Borough has an expected benchmark turnover of £743.9m at 2021, which is above the estimated survey derived turnover of £703.4m. As such, taken collectively, convenience goods floorspace is 'under trading' by £40.5m at 2021. In order to appraise the need for additional convenience goods floorspace going forward, it is necessary to consider how the performance of stores will be affected by forecast expenditure growth. Accordingly, Table 7.1 also sets out the anticipated increases in expenditure that will be available to the Borough's convenience goods retailers, assuming its current market share is maintained. We have assumed that the benchmark turnover of floorspace will change going forward in accordance with the forecast changes in floorspace efficiency set out in ERPBN18.
- 7.16 Table 7.1 sets out our estimate that the convenience goods expenditure available to facilities in Sefton Borough will increase to £708.7m at 2026 and then to £712.9m at 2031. When the forecast increase in available convenience goods expenditure is compared to growth in the benchmark turnover of such floorspace, the identified estimated convenience goods deficit increases slightly to £41.1m at 2026, before then decreasing to £37.0m at 2031.

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<sup>42</sup> Generally sourced from GlobalData Convenience and Comparison Goods Sales Densities of Major Grocers 2020, except where we believe that this data is not likely representative of how a store trades in practice. Detailed notes in respect of our approach in calculating net convenience goods sales areas are provided at Table 5 of Appendix X.

<sup>43</sup> The gross and net sales areas are taken from Storepoint data where available, in other circumstances this is sourced from the VOA or available planning applications.



**Table 7.1: Quantitative Need for Convenience Goods Floorspace in Sefton Borough**

Year	Benchmark Turnover (£m)	Available Expenditure (£m)	Surplus Expenditure (£m)
2021	743.9	703.4	-40.5
2026	749.8	708.7	-41.1
2031	749.8	712.9	-37.0

Source: Table 6a of Appendix IV

Notes: Assumes constant market share (64.5%) of Study Area expenditure claimed by facilities in Sefton Borough; allows for changes in benchmark turnover sales efficiency in accordance with Table 4b of Experian Retail Planner Briefing Note 18 In 2019 prices

7.17 In considering future needs, account also needs to be made of commitments which will provide for additional retail floorspace. We estimate that extant retail planning permissions together provide an estimated 4,766 sq.m of convenience goods sales floorspace across the Borough. As Table 7.2 identifies, we estimate that this floorspace would have a turnover of around £55.6m at 2021 (if it was all operational). The most notable convenience goods commitment is the proposed Sainsbury's superstore at Meols Cop in Southport (which accounts for £36.0m of the estimated turnover of £55.6m), however additional commitments include the proposed Aldi at Northway, Maghull and expanded M&S Food at Aintree Retail Park. Full details of the assumptions made in estimating the turnover of convenience goods commitments are provided in the notes that accompany Table 6c of Appendix IV.

**Table 7.2: Committed and Implemented Convenience Goods Floorspace in Sefton Borough at 2021**

Area	Zone	Location	Planning App. Reference	Proposal	Net Conv Sales (sq.m)	Conv Sales Density (£ per sq.m)	Estimate T'over at 2021 (£m)	Status
North Sefton	Zone S	Homebase, Meols Cop	DC/2018/01775	Proposed Sainsbury's superstore	2,939	12,240	36.0	Extant
<b>North Sefton Sub-Total</b>					<b>2,939</b>		<b>36.0</b>	
South Sefton	Zone C	Moor Lane, Crosby	DC/2018/00407	Change of Use from Class A3 use to Classes A1 to A5	70	7,000	0.5	Extant
	Zone M	Site Of Alt Service Station, Maghull	DC/2020/01437	Erection of a Class A1 foodstore	1,066	11,143	11.9	Extant
	Zone L	3 And 4 Racecourse Retail Park, Aintree	DC/2020/00618	Proposed amalgamation of Units 3 and 4	691	10,448	7.2	Extant
<b>South Sefton Sub-Total</b>					<b>1,827</b>		<b>19.6</b>	
<b>Sefton Borough Total</b>					<b>4,766</b>		<b>55.6</b>	

Source: Table 6c of Appendix IV

Notes: Net sales area and estimated sales density reflect operator for Meols Cop and Nexus Planning's own estimate for Moor Lane In 2019 prices

7.18 As the below Table 7.3 demonstrates, the expenditure claimed by convenience goods commitments acts to further diminish any Borough-wide capacity to support additional convenience goods floorspace across the reporting period. The identified expenditure deficit of £96.0m at 2021 reduces slightly to £93.0 at 2031. The negative floorspace requirement effectively suggests that the Borough has an oversupply in convenience goods floorspace.

**Table 7.3: Quantitative Need for Convenience Goods Floorspace in Sefton Borough After Commitments**

Year	Surplus (£m)	Commitments (£m)	Residual (£m)	Floorspace Requirement	
				Minimum (sq.m)	Maximum (sq.m)
2021	-40.5	55.6	-96.0	-7,100	-8,500
2026	-41.1	56.0	-97.2	-7,100	-8,600
2031	-37.0	56.0	-93.0	-6,800	-8,200

Source: Table 6d of Appendix IV

Notes: Assumes constant market share (64.5%) of Study Area expenditure claimed by facilities in Sefton Borough; allows for changes in benchmark turnover sales efficiency in accordance with Table 4a of Experian Retail Planner Briefing Note 18; minimum floorspace requirement based on an assumed sales density of £13,621 per sq.m at 2021 (which equates to the average sales density of the 'big four' foodstore operators); maximum floorspace requirement based on an assumed sales density of £11,264 per sq.m at 2021 (which equates to the mid-point between the sales densities of Aldi and Lidl); floorspace requirement is to the rounded to the nearest 100 sq.m

In 2019 prices

#### Convenience Goods Capacity in North Sefton

7.19 Given the size of the Borough and the fact that principal conurbations are separate, it is appropriate to consider the position in respect of need in North and South Sefton. The former area relates to the part of the Borough surrounding Southport and Formby, and the latter relates to the area around Bootle, Litherland, Maghull and Crosby. North Sefton essentially incorporates Study Area Zones F and S, and South Sefton incorporates Zones B, C and M, and parts of Zones L and O.

7.20 As the below Table 7.4 demonstrates, we estimate that convenience goods floorspace in North Sefton claims around £333.2m at 2021, based on an identified market share of 30.0% of all such expenditure that originates within the Study Area. This compares to an anticipated benchmark survey of £355.2m; consequently, an expenditure deficit of £22.0m is apparent at 2021. Assuming that convenience goods facilities in North Sefton maintain this market share over the reporting period to 2031, we estimate that this deficit will increase marginally to £22.3m at 2026, before then decreasing to £20.3m at 2031.

**Table 7.4: Quantitative Need for Convenience Goods Floorspace in North Sefton**

Year	Benchmark Turnover (£m)	Available Expenditure (£m)	Surplus Expenditure (£m)
2021	355.2	333.2	-22.0
2026	358.0	335.7	-22.3
2031	358.0	337.7	-20.3

Source: Table 6e of Appendix IV

Notes: Assumes constant market share (30.0%) of Study Area expenditure claimed by facilities in North Sefton; allows for changes in benchmark turnover sales efficiency in accordance with Table 4a of Experian Retail Planner Briefing Note 18  
In 2019 prices

7.21 Since the 2015 RSR reported, an Aldi foodstore commenced trading at Birkdale Trading Estate in October 2018, and planning permission has been granted for a Sainsbury's superstore at Meols Cop in Southport. The most recent planning permission for the Meols Cop Sainsbury's (planning permission reference DC/2018/01775) provides for a smaller scheme than that which was previously approved, albeit one which will still have a net convenience goods sales area of around 2,939 sq.m. On implementation, the Meols Cop Sainsbury's will further increase the collective benchmark turnover of facilities in North Sefton.

7.22 We estimate that the Meols Cop commitment has a convenience goods turnover of £36.0m at 2021. As such, Table 7.5 identifies that, once account has been taken of consented floorspace, there is a clear oversupply of convenience goods floorspace in the North Sefton area across the period to 2031.

**Table 7.5: Quantitative Need for Convenience Goods Floorspace in North Sefton After Commitments**

Year	Surplus (£m)	Commitments (£m)	Residual (£m)	Floorspace Requirement	
				Minimum (sq.m)	Maximum (sq.m)
2021	-22.0	36.0	-57.9	-4,300	-5,100
2026	-22.3	36.3	-58.6	-4,300	-5,200
2031	-20.3	36.3	-56.6	-4,100	-5,000

Source: Table 6f of Appendix IV

Notes: Assumes constant market share (30.0%) of Study Area expenditure claimed by facilities in North Sefton; allows for changes in benchmark turnover sales efficiency in accordance with Table 4a of Experian Retail Planner Briefing Note 18; minimum floorspace requirement based on an assumed sales density of £13,621 per sq.m at 2021 (which equates to the average sales density of the 'big four' foodstore operators); maximum floorspace requirement based on an assumed sales density of £11,264 per sq.m at 2021 (which equates to the mid-point between the sales densities of Aldi and Lidl); floorspace requirement is to the rounded to the nearest 100 sq.m  
In 2019 prices

Convenience Goods Capacity in South Sefton

7.23 Table 7.6 identifies that convenience goods floorspace in South Sefton claims around £370.2m at 2021, based on an identified market share of 34.4% of all such expenditure that originates within the Study Area. This compares to an anticipated benchmark survey of £388.7m. As such, an expenditure deficit of £18.5m is available at 2021. Assuming the convenience goods facilities in Zones B, C, M, O and L maintain the existing market share over the reporting period to 2031, we estimate that this deficit will remain relatively static to 2026, and then decrease to £16.7m at 2031.

**Table 7.6: Quantitative Need for Convenience Goods Floorspace in South Sefton**

Year	Benchmark Turnover (£m)	Available Expenditure (£m)	Surplus Expenditure (£m)
2021	388.7	370.2	-18.5
2026	391.8	373.0	-18.8
2031	391.8	375.2	-16.7

Source: Table 6g of Appendix IV

Notes: Assumes constant market share (34.4%) of Study Area expenditure claimed by facilities in North Sefton; allows for changes in benchmark turnover sales efficiency in accordance with Table 4a of Experian Retail Planner Briefing Note 18 In 2019 prices

7.24 Subsequent to the publication of the 2015 RSR, we are aware that planning permission (reference DC/2020/00618) has been granted for the amalgamation of Units 3 and 4 at Racecourse Retail Park, Aintree. We understand that this unit will include convenience goods floorspace to be occupied by M&S Food. Additionally, planning permission (reference DC/2020/01437) has been granted for the erection of a Class A1 foodstore (to be occupied by Aldi) at Northway, Maghull. Finally planning permission (reference DC/2018/00407) has been granted to change the use of premises at Moor Lane in Crosby to retail uses (which is likely to incorporate some convenience goods floorspace). We estimate that these commitments will have a convenience goods turnover of around £19.6m at 2021.

7.25 Table 7.7 identifies that, once account has been taken of these commitments, the convenience goods expenditure deficit position for South Sefton is increased and there is a convenience goods expenditure deficit for South Sefton of £18.5m at 2021, decreasing to £16.7m at 2031. Table 7.7 identifies that once consented floorspace has been considered there is no quantitative need for additional convenience goods floorspace in the South Sefton area across the period to 2031, and that there is an oversupply of floorspace.

**Table 7.7: Quantitative Need for Convenience Goods Floorspace in South Sefton After Commitments**

Year	Surplus (£m)	Commitments (£m)	Residual (£m)	Floorspace Requirement	
				Minimum (sq.m)	Maximum (sq.m)
2021	-18.5	19.6	-38.1	-2,800	-3,400
2026	-18.8	19.7	-38.6	-2,800	-3,400
2031	-16.7	19.7	-36.4	-2,700	-3,200

Source: Table 6h of Appendix IV

Notes: Assumes constant market share (34.4%) of Study Area expenditure claimed by facilities in North Sefton; allows for changes in benchmark turnover sales efficiency in accordance with Table 4a of Experian Retail Planner Briefing Note 18; minimum floorspace requirement based on an assumed sales density of £13,621 per sq.m at 2021 (which equates to the average sales density of the 'big four' foodstore operators); maximum floorspace requirement based on an assumed sales density of £11,264 per sq.m at 2021 (which equates to the mid-point between the sales densities of Aldi and Lidl); floorspace requirement is to the rounded to the nearest 100 sq.m

In 2019 prices

### Future Quantitative Comparison Goods Capacity

- 7.26 Our methodology in calculating comparison goods capacity deviates from that employed in respect of convenience goods. This is because it is difficult to accurately estimate a benchmark turnover for comparison goods floorspace, both because of the number of units involved (which are occupied by a wide variety of retailers), and due to the variation in the trading performance of floorspace depending on its location, the character of the area and the nature of the catchment. As a consequence, we adopt the position for comparison goods floorspace that it is trading 'at equilibrium' at base year 2021 (i.e. our survey derived turnover estimate effectively acts as benchmark).
- 7.27 We assume that there is therefore a nil quantitative need for any additional comparison goods floorspace across the Borough at 2021. Going forward, we assume that the performance of comparison goods facilities will be commensurate with the market share identified by the household shopper survey.
- 7.28 Our approach in respect of comparison goods inflow again replicates that adopted by the 2015 RSR, which again derived an inflow allowance based on STEAM data. Paragraph 7.43 of the 2015 RSR outlines the following approach to inflow:

**'Given the strong tourist economy of Sefton, we do consider that Southport, Formby and Crosby will attract significant custom from outside the Study Area. We consider that visitor spending on comparison goods is most likely to be focused on the non-bulky goods with spending on bulky goods generally taking place closer to visitors' homes. For spending on non-bulky comparison goods, we have therefore assumed 20%**

**inflow for spending at stores in and at the edge of Southport town centre, and 10% inflow for stores in Formby and Crosby district centres.'**

- 7.29 We have again reviewed the latest Sefton STEAM Trend Report for 2009-2017, and believe that the above approach remains appropriate. On this basis, we have made an allowance for an additional £51.1m of inflow expenditure to be generated from shoppers residing outside the Study Area. We set out our detailed assumptions in respect of inflow at Table 25 of Appendix IV.
- 7.30 The inflow allowance has the effect of increasing Sefton Borough's identified estimated comparison goods turnover from £900.1m to £951.2m (inflow therefore representing 5.4% of total turnover).
- 7.31 The £900.1m of comparison goods expenditure claimed by facilities within Sefton Borough which originates from inside the Study Area equates to a market share of 69.5% of all such comparison goods expenditure. By making provision for inflow and 'rolling forward' this market share, our assessment finds that facilities in the Borough will attract £1,079.1m at 2026, increasing to £1,227.1m at 2031.
- 7.32 Given forecast increases in comparison goods expenditure and allowing for annual forecast changes in the productivity of existing floorspace, we estimate that, at 2021, there will be a relatively substantial expenditure deficit of £39.6m at 2026, with this deficit growing further to £49.8m at 2031. This is set out below at Table 7.8.

**Table 7.8: Quantitative Need for Comparison Goods Floorspace in Sefton Borough**

Year	Benchmark Turnover (£m)	Available Expenditure (£m)	Surplus Expenditure (£m)
2021	951.2	900.1	0.0
2026	1,118.7	1,079.1	-39.6
2031	1,276.9	1,161.2	-49.8

Source: Table 26a of Appendix IV

Notes: Assumes constant market share (69.5%) of Study Area expenditure claimed by facilities in Sefton Borough; allows for changes in benchmark turnover sales efficiency in accordance with Table 4b of Experian Retail Planner Briefing Note 18  
In 2019 prices

- 7.33 Once more, the above assessment does not take into consideration existing commitments and the claims they will have on capacity. Table 7.9 summarises current extant planning permissions that provide for additional comparison goods floorspace. We estimate that these commitments will have a total turnover of £19.7m at 2021. The commitments include the comparison goods floorspace associated with the extant Sainsbury's superstore planning permission at Meols Cop in Southport, the

Aldi at Northway in Maghull and the proposed amalgamation of Units 3 and 4 at Racecourse Retail Park, Aintree.

7.34 The turnover of identified extant comparison goods commitments is relatively moderate, but it acts to further depress any requirement for additional comparison goods floorspace over the next ten years.

**Table 7.9: Committed and Implemented Comparison Goods Floorspace in Sefton Borough at 2021**

Area	Zone	Location	Planning App. Reference	Proposal	Net Conv Sales (sq.m)	Conv Sales Density (£ per sq.m)	Estimate T'over at 2018 (£m)	Status
North Sefton	Zone S	Homebase, Meols Cop	DC/2018/01775	Proposed Sainsbury's superstore	1,765	8,107	14.3	Extant
<b>North Sefton Sub-Total</b>					<b>1,765</b>		<b>14.3</b>	
South Sefton	Zone C	Moor Lane, Crosby	DC/2018/00407	Change of Use from Class A3 use to Classes A1 to A5	70	3,000	0.2	Extant
	Zone M	Site Of Alt Service Station, Northway, Maghull	DC/2020/01437	Erection of a Class A1 foodstore	266	6,996	1.9	Extant
	Zone L	3 And 4 Racecourse Retail Park Aintree	DC/2020/00618	Proposed amalgamation of Units 3 and 4	358	9,259	3.3	Extant
<b>South Sefton Sub-Total</b>					<b>694</b>		<b>5.4</b>	
<b>Sefton Borough Total</b>					<b>2,459</b>		<b>19.7</b>	

Source: Table 26c of Appendix IV

Notes: Net sales area and estimated sales density reflect operator for Meols Cop and Nexus Planning's own estimate for Moor Lane  
In 2019 prices

7.35 Taking account of extant commitments, the identified requirement in respect of additional comparison goods floorspace is set out at Table 7.10. The negative floorspace across each reporting year is indicative of the quantum of comparison goods floorspace which could be lost across the Borough.

**Table 7.10: Quantitative Need for Comparison Goods Floorspace in Sefton Borough After Commitments**

Year	Surplus (£m)	Commitments (£m)	Residual (£m)	Floorspace Requirement	
				Minimum (sq.m)	Maximum (sq.m)
2021	0.0	19.7	-19.7	-3,600	-5,600
2026	-39.6	23.2	-62.7	-9,700	-15,200
2031	-49.8	26.4	-76.2	-10,300	-16,200

Source: Table 26d of Appendix IV

Notes: Assumes constant market share (69.5%) of Study Area expenditure claimed by facilities in Sefton Borough; allows for changes in benchmark turnover sales efficiency in accordance with Table 4b of Experian Retail Planner Briefing Note 18; minimum floorspace requirement based on an assumed sales density of £5,500 per sq.m at 2018; maximum floorspace requirement based on an assumed sales density of £3,500 per sq.m  
In 2019 prices

### Comparison Goods Capacity in North Sefton

- 7.36 Our assessment indicates that facilities in North Sefton claim a market share of 29.0% of all comparison goods expenditure which is generated within the Study Area. This equates to £375.1m at 2021.
- 7.37 North Sefton includes Formby and Southport and it is therefore the focus of tourism in the Borough. As such, our methodology assumes that the vast majority of tourists' comparison goods expenditure in Sefton will be undertaken in the north of the Borough. We estimate that inflow will account for £48.8m at 2021. The inflow allowance has the effect of increasing North Sefton's identified estimated comparison goods turnover from £375.1m to £423.9m (inflow therefore representing 11.5% of total turnover).
- 7.38 By making provision for inflow and 'rolling forward' the identified market share, our assessment finds that comparison goods facilities in North Sefton will attract £481.0m at 2026, increasing to £546.9m at 2031.
- 7.39 As Table 7.11 illustrates, after account is once again made for annual forecast changes in the productivity of existing floorspace, our assessment identifies that there is no surplus expenditure available to support additional floorspace in North Sefton across the reporting period. At 2026, we identify a comparison goods expenditure deficit of £17.6m, increasing to a deficit of £22.2m at 2031.

**Table 7.11: Quantitative Need for Comparison Goods Floorspace in North Sefton**

Year	Benchmark Turnover (£m)	Available Expenditure (£m)	Surplus Expenditure (£m)
2021	423.9	423.9	0.0
2026	498.6	481.0	-17.6
2031	569.1	546.9	-22.2

Source: Table 26e of Appendix IV

Notes: Assumes constant market share (29.0%) of Study Area expenditure claimed by facilities in Sefton Borough; allows for changes in benchmark turnover sales efficiency in accordance with Table 4b of Experian Retail Planner Briefing Note 18 In 2019 prices

- 7.40 We estimate that committed comparison goods floorspace in North Sefton would have a turnover of £14.3m at 2021; all of this expenditure is attributable to the comparison goods element of the extant planning permission for the Sainsbury's superstore at Meols Cop. Table 7.12 sets out the further deficit which results as a consequence of the Meols Cop commitment.



**Table 7.12: Quantitative Need for Comparison Goods Floorspace in North Sefton After Commitments**

Year	Surplus (£m)	Commitments (£m)	Residual (£m)	Floorspace Requirement	
				Minimum (sq.m)	Maximum (sq.m)
2021	0.0	14.3	-14.3	-2,600	-4,100
2026	-17.6	16.8	-34.5	-5,300	-8,400
2031	-22.2	19.2	-41.4	-5,600	-8,800

Source: Table 26f of Appendix IV

Notes: Assumes constant market share (29.0%) of Study Area expenditure claimed by facilities in Sefton Borough; allows for changes in benchmark turnover sales efficiency in accordance with Table 4b of Experian Retail Planner Briefing Note 18; minimum floorspace requirement based on an assumed sales density of £5,500 per sq.m at 2018; maximum floorspace requirement based on an assumed sales density of £3,500 per sq.m

In 2019 prices

7.41 The vacancy rate in Southport remains higher than the national average (both in respect of the proportion of floorspace and the proportion of units that are vacant). Our survey identified that 20.5% of the commercial stock of retail floorspace in Southport town centre was vacant at October 2020. The above assessment suggests that (based on the maintenance of North Sefton’s current market share) that the amount of vacant retail stock in Southport (and other parts of North Sefton) could increase further still.

#### Comparison Goods Capacity in South Sefton

7.42 Our assessment indicates that facilities in the south of the Borough claim a market share of 40.5% of all comparison goods expenditure generated within the Study Area. At 2021, this equates to a turnover of £527.2m.

7.43 Given that North Sefton is the focus of the Borough’s tourism, our methodology estimates that inflow will account for just £2.2m of comparison goods tourism in South Sefton at 2021 (this represents just 0.4% of the total turnover of comparison goods provision).

7.44 By making provision for inflow and ‘rolling forward’ the identified market share, our assessment finds that comparison goods facilities in South Sefton will attract £598.2m at 2026, increasing to £680.2m at 2031.

7.45 Once again, after account is made for forecast changes in floorspace productivity, there is no comparison goods expenditure surplus available to support additional floorspace. As set out by Table 7.13, we estimate that there will be a comparison goods expenditure deficit in South Sefton of £21.9m at 2026, increasing to a deficit of £27.6m at 2031.

**Table 7.13: Quantitative Need for Comparison Goods Floorspace in South Sefton**

Year	Benchmark Turnover (£m)	Available Expenditure (£m)	Surplus Expenditure (£m)
2021	527.2	527.2	0.0
2026	620.1	598.2	-21.9
2031	707.8	680.2	-27.6

Source: Table 26g of Appendix IV

Notes: Assumes constant market share (40.5%) of Study Area expenditure claimed by facilities in Sefton Borough; allows for changes in benchmark turnover sales efficiency in accordance with Table 4b of Experian Retail Planner Briefing Note 18 In 2019 prices

7.46 Committed comparison goods in South Sefton has an estimated turnover of £5.4m at 2021. As the below Table 7.14 identifies, the increasing expenditure deficit suggests that further comparison goods floorspace is likely to be vacated in the southern part of the Borough in the period to 2031.

**Table 7.14: Quantitative Need for Comparison Goods Floorspace in South Sefton After Commitments**

Year	Surplus (£m)	Commitments (£m)	Residual (£m)	Floorspace Requirement	
				Minimum (sq.m)	Maximum (sq.m)
2021	0.0	5.4	-5.4	-1,000	-1,500
2026	-21.9	6.3	-28.3	-4,400	-6,900
2031	-27.6	7.2	-34.8	-4,700	-7,400

Source: Table 26h of Appendix IV

Notes: Assumes constant market share (40.5%) of Study Area expenditure claimed by facilities in Sefton Borough; allows for changes in benchmark turnover sales efficiency in accordance with Table 4b of Experian Retail Planner Briefing Note 18; minimum floorspace requirement based on an assumed sales density of £5,500 per sq.m at 2018; maximum floorspace requirement based on an assumed sales density of £3,500 per sq.m In 2019 prices

### Qualitative Requirements

7.47 As we identified earlier in this section, we estimate that convenience goods retail facilities in Sefton Borough turn over £703.4m at 2021, which is less than their expected benchmark turnover of £743.9m. However, in examining the performance of specific stores, it is evident that Aldi's discount supermarkets are performing particularly strongly and that the performance of food superstores<sup>44</sup> is more variable<sup>45</sup>.

<sup>44</sup> Defined as having a net sales area of more than 2,500 sq.m.

<sup>45</sup> In this regard it should be noted that, whilst household survey respondents have in the past perhaps been slightly reluctant to acknowledge that they undertake their main food shop at a discounter, this no longer appears to be the case. In addition, our methodology apportions convenience goods expenditure to foodstore destinations according to their identified market share. The methodology does not take into consideration that similar items are generally cheaper in Aldi and Lidl than in one of the 'big four' operators' stores. As such, the performance of discount operators is probably overstated and the performance of the 'big four' operators is probably understated.

- 7.48 The below Table 7.15 provides an overview of the current performance of existing larger foodstores (which provide an estimated net convenience goods sales area of 689 sq.m or more<sup>46</sup>) in Sefton Borough with reference to their expected trading performance. There are a total of seven food superstores<sup>47</sup> across the Borough<sup>48</sup>, which collectively have an estimated convenience goods turnover of £267.3m, which is lower than their anticipated benchmark turnover of £362.6m.
- 7.49 All of the seven food superstores 'undertrade' when compared to their anticipated benchmark turnover. The food superstore with the strongest performance is the Tesco at Hawthorne Road in Litherland, which has an estimated convenience goods benchmark turnover of £43.1m and an estimated survey derived turnover of £40.8m (we therefore estimate that it is undertrading by around -£2.4m). The worst performing food superstore appears to be the Asda at Ormskirk Road in Aintree, which has a convenience goods benchmark turnover of £88.1m and an estimated survey derived turnover of £58.6m (it is therefore undertrading by an estimated £29.5m).
- 7.50 Whilst the identified trading performance of the Asda at Ormskirk Road is unusually poor, it is evident that, throughout the Borough (and the country as a whole), shoppers are frequently foregoing the previously dominant 'big four' foodstore operators in favour of discounters. As a consequence of this, we believe that it is highly unlikely that there will be any requirement in the foreseeable future for any further large food superstores in the area. This is consistent with the current strategy of the 'big four' who are currently very circumspect in terms of their appetite to bring forward additional large superstores.
- 7.51 We do, however, note that some Aldi discount foodstores are performing exceptionally well. The five Aldi stores in the Borough have a collective convenience goods benchmark turnover of £56.1m and an estimated survey derived turnover of £138.3m; as such, their convenience goods floorspace overtrades by an estimated £82.2m. As set out at Section 2 of this report, both Aldi and Lidl have substantially improved their share of the national grocery market in recent years. Notwithstanding this, the very strong performance of Aldi foodstores across the Borough suggests that the market could support more discount foodstore provision. In this regard, we note that the Council has recently approval a proposal for an Aldi discount foodstore in Maghull (planning application reference DC/2020/01437),

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<sup>46</sup> Which equates to the convenience goods net sales area of the smallest discount supermarket operated by either Aldi or Lidl, this being the Lidl at Northway in Maghull

<sup>47</sup> Defined as having a net sales area of more than 2,500 sq.m

<sup>48</sup> Three Asda stores, three Tesco stores and a Morrisons

and that both Aldi and Lidl have further requirements for new stores across the Borough at February 2021.

**Table 7.15: Performance of Convenience Goods Floorspace at Principal Foodstores at 2021**

Zone	Store	Estimated Net Conv. Floorspace (sq.m)	Sales Density (£ per sq.m)	Bench-mark Turnover (£m)	Survey Derived Turnover (£m)	Over-trading (£m)
F	M&S Simply Food, Formby	800	10,448	8.4	4.5	-3.9
	Tesco, Altcar Road, Formby	2,825	14,447	40.8	31.5	-9.3
	Waitrose, Three Tuns Lane, Formby	1,806	13,718	24.8	20.7	-4.1
S	Aldi, Liverpool Road, Birkdale	1,165	11,143	13.0	39.6	26.6
	Aldi, Meols Cop, Southport	1,211	11,143	13.5	38.9	25.4
	Asda, C12 Shopping Park, Southport	2,574	14,784	38.1	27.4	-7.6
	Co-op, Fylde Road, Southport	911	11,355	10.3	10.9	0.6
	Co-op, Station Road, Ainsdale	817	11,355	9.3	5.2	-4.1
	Lidl, Virginia Street, Southport	819	11,386	9.3	9.1	-0.2
	Morrisons, Winter Gardens, Southport	3,023	13,014	39.3	32.9	-6.5
	Sainsbury's, St George's Place, S'port	2,138	12,240	26.2	14.1	-12.1
	Tesco Extra, Meols Cop, Southport	4,645	14,447	67.1	52.0	-15.2
B	Aldi, Park Lane West, Netherton	835	11,143	9.3	22.1	12.8
	Aldi, Washington Parade, Bootle	856	11,143	9.5	7.4	-2.1
	Asda, Orrell Lane, Bootle	1,165	14,784	17.2	20.2	3.0
	Asda, Strand Road, Bootle	3,115	14,784	46.1	21.2	-24.9
	Lidl, Marsh Lane, Bootle	949	11,386	10.8	6.0	-4.8
	Lidl, Wellington Road, Seaforth	843	11,386	9.6	7.5	-2.1
	Tesco, Hawthorne Road, Litherland	2,985	14,447	43.1	40.8	-2.4
C	Aldi, Moor Lane, Thornton, Crosby	969	11,143	10.8	30.2	19.4
	Co-op, Waterloo, Liverpool	868	11,355	9.9	6.6	-3.3
	Sainsbury's, Liverpool Road, Crosby	1,983	12,240	24.3	25.8	1.5
M	Asda, Ormskirk Road, Aintree	5,962	14,784	88.1	58.6	-29.5
	Lidl, Northway, Maghull	689	11,386	7.8	17.8	10.0
	Morrisons, Maghull	1,094	13,014	14.2	24.5	10.3

Source: Table 5 of Appendix IV

Notes: The above summary table provides details of the trading performance of foodstores with a net convenience goods sales area of 689 sq.m or above, which correlates to the estimated net sales area of the smallest discount supermarket in Sefton Borough (this being the Lidl at Northway in Maghull)

In 2019 prices

7.52 However, it is important to again recognise that this RSR has not identified any quantitative need for additional convenience goods floorspace and any additional proposed food supermarkets should be considered on their merits in accordance with relevant policy tests. Most particularly, planning applications which seek to provide additional food retail provision should be considered having regard to potential sequential alternative sites and the magnitude of impacts arising at any defined centre (and with reference to the qualitative benefits which may result from the delivery of additional convenience goods retail facilities).

- 7.53 In terms of the spatial distribution of convenience goods facilities, we believe that existing large-scale main food shopping facilities are generally sited in a sustainable manner. In this regard, we note that the towns of Southport and Bootle benefit from proximity to a variety of foodstores, and that choice also exists in Crosby, Formby and Maghull. Whilst Waterloo's offer is more limited, its residents are able to access a range of foodstores in Crosby to the north and Litherland to the south. The distribution of the existing stores and defined centres are shown on the plan at Appendix V.
- 7.54 Turning to comparison goods, the importance and relative dominance of Liverpool city centre and the choice now provided at Aintree Retail Park mean that other centres in South Sefton have a more localised role and function than might otherwise be the case. Whilst we believe that the location of these two destinations is such that they make important contributions to meeting some of Sefton residents' comparison goods needs, it will be important to try and protect and enhance the role of both Southport and Bootle town centre going forward.
- 7.55 Whilst the overall clothing and footwear retention rate in the Borough has increased slightly since the undertaking of the previous household shopper survey in 2015, this is a consequence of the improved performance of Aintree Shopping Park in this sector. Table 4.8 of this report identifies that Aintree Retail Park's Study Area clothing and footwear market share increased from 13% in 2015 to 23% at 2020. This was partly at the expense of Bootle, which suffered a notable decrease in clothing and footwear market share (from 6% of all such Study Area shopping trips in 2015 to 2% in 2020). Whilst the survey results suggest that Southport was more resilient (with its clothing and footwear market share decreasing one percentage point to 19% between 2015 and 2020), recent changes in retail representation are in danger of further eroding its long term clothing and footwear retail function.
- 7.56 It will be important to ensure that Bootle and Southport further diversify in order to provide a balanced and relevant offer, which encourages visitors to dwell and use the centre for different activities. However, clothing and footwear will continue to have a place in underpinning the future viability of the Borough's larger town centres. As such, we recommend that careful consideration is given to further proposals which could impact on the viability of Bootle and Southport as retail destinations in order that this function is retained (and, where possible, improved upon).

## 8.0 Summary and Conclusions

### Key Findings: The Health of Sefton's Centres

#### Southport Town Centre

- 8.1 Southport is the principal town centre in Sefton and is located approximately 30 kilometres from both Liverpool and Preston. Southport came to prominence as a seaside resort, and tourism and various events still make a substantial contribution to the local economy.
- 8.2 Southport's role and function is reflected in its composition. The single most prevalent use is comparison goods retail, which accounted for 199 units and very nearly 45,000 sq.m of floorspace at October 2020 (equating to 28.8% of all commercial units and 26.3% of all floorspace). However, the comparison goods offer has reduced considerably since May 2015 (when 35.7% of units and 38.2% of floorspace was in comparison goods use), largely due to the closure of BHS, Debenhams and Beales. Whilst such a reduction in the offer is clearly a symptom of wider structural issues in the comparison retail sector, the change is stark and undoubtedly has a bearing on the attractiveness of the town as a shopping venue.
- 8.3 In terms of the vacancy rate within the town centre, our survey identified that 20.5% of units are vacant, which is substantially higher than the national average rate of 12.0%. In addition, 18.8% of commercial floorspace was vacant in Southport town centre at October 2020 which is higher than the national average of 12.5%.
- 8.4 Whilst the vacant units are distributed throughout the town centre, there is a notable concentration along Lord Street, including the former Beales and Debenhams units. In addition, a number of higher profile units on Chapel Street remain vacant, including the former BHS and H&M units. Not only are these large units in prominent locations, they were all key comparison goods anchors which provided a reason to choose to visit Southport over other centres, including the out of centre facilities within Sefton.
- 8.5 Such large vacant units have subsequently proven difficult to let, which is both reflective of the lack of demand in the retail sector and the nature of the accommodation, which is somewhat dated and arranged over a number of floors.

- 8.6 Both the nature of the vacancy rate and the type of vacancies (which include a number of larger units in central areas) give reason for concern. It is important that Southport town centre continues to meet the needs of residents and visitors, and a competitive comparison goods retail sector should remain a key part of the centre's offer. Whilst Sefton town centre remains visually attractive, its ability to perform two important roles (as both a retail and tourist centre) is critical in generating a good level of footfall in the central shopping streets.
- 8.7 At the end of October 2020, Sefton Council submitted a bid for £50 million of funding from the Government's Towns Fund, with an award of £37.5m being announced in the March 2021 budget. This funding will be invested into existing attractions, the creation of all-weather attractions around the sea front as well as efforts to increase enterprise and grow businesses within the town centre. It is hoped that the investment secured through the Town Deal will help to create over 1,000 new jobs and generate an extra 1 million visitors per year.
- 8.8 Two proposals, including a revamp of Southport Market (work on which started in October 2020) and the creation of the Southport Cove water park and surfing lake, have already secured funding from various sources. Other projects include a new convention and events centre, the regeneration of Lord Street, a business incubator space and a revamp of Southport Pleasureland. Additionally, in November 2020, plans for circa 28,000 sq.m of new public spaces in the town centre and waterfront, and improved pedestrian and cycling routes were unveiled.

#### Bootle Town Centre

- 8.9 Bootle town centre is dominated by The Strand Shopping Centre, a managed environment, which accommodates most of the centre's retail offer, but also results in the centre being somewhat 'inward-facing'. Bootle has a reasonable overall environmental quality. There are significant vacancies but these are concentrated in The Palatine and The Hexagon within The Strand, which are among the least prominent parts of the centre.
- 8.10 The composition of Bootle is relatively typical for a centre of its size, with a good mixture of retail, service and other main town centre uses. Experian Goad's definition of the centre encompasses both the Asda superstore at Strand Road and the Lidl at Marsh Lane, which are a relatively short walk from The Strand and therefore offer some potential to support some linked trips to facilities within the centre.

- 8.11 Whilst The Strand Shopping Centre is somewhat of its time (and would benefit from additional updating), its managed environment helps Bootle to perform at least moderately well in respect of its environmental quality, accessibility, and the perception of safety. The majority of traditional units on Stanley Road are reasonably well maintained and relatively recent planting and public realm improvements, and a number of new developments, also add to quality of the environment. However, in our view, Bootle town centre, both in respect of its offer and its environment, would benefit from further modernisation and investment.
- 8.12 Sefton Council acquired The Strand Shopping Centre in 2017, and is proceeding with ambitious regeneration plans. We also note that £1 million investment from the Liverpool City Region Combined Authority was secured in December 2019, and a further £650,000 funding from the Combined Authority was announced in October 2020. Furthermore, the former Post Office site in Stanley Road has now been acquired by the Council, along with the Easirent van hire premises on Washington Road<sup>49</sup>.
- 8.13 Whilst engagement work is underway, unused areas in and around The Strand could be used for food and drink, pop-up markets, artists' studios and craft workshops, alongside education and training facilities and performance spaces.

#### District Centres

- 8.14 In terms of Sefton's district centres, we found the following:
- **Crosby** has a relatively modest comparison goods offer. However, Crosby's convenience goods offer is relatively strong and is focused around the Sainsbury's and Farmfoods foodstores. Crosby's retail offer is considered appropriate to a district centre and is sufficient to meet most day to day needs of residents.

The strength of the service sector is considered to be one of Crosby district centre's key attributes, with a diverse range of service operators within the centre. The proportion of commercial units which are vacant is less than the national average level as a consequence of the vacancy rate reducing in Crosby in recent years. This can be partly attributed to St Modwen's interests – including the Glenn Buildings – becoming substantially let.

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<sup>49</sup> Planning application reference DC/2020/01579 for prior notification application for the demolition of the former Bootle New Strand Post Office and the former Easirent depot, approved September 2020.



- **Formby**'s vacancy rate is lower than the national average level, but it has increased substantially in recent years (it has historically been very low). In this regard, we note that the Pizza Express at Chapel Lane had closed permanently by the time of our October 2020 survey, and shortly after (in November 2020) the closure of Edinburgh Woollen Mill at Brows Lane was confirmed. The increase in Formby's vacancy rate has been relatively rapid and it will be important to try and safeguard against further losses wherever possible.
- **Maghull** has a good level of convenience goods and service provision, reflecting its role at the centre of the surrounding community. The Morrisons foodstore at Stafford Moreton Way helps anchor the centre, as do a number of national multiple household comparison goods retailers, namely B&M and Home Bargains. These retailers occupy relatively large units, which means that comparison goods floorspace accounts for around a third of all floorspace in the centre. As of October 2020, the Central Square area of Maghull is undergoing improvements pursuant to planning application reference DC/2016/00268.
- **Waterloo** has a good range of convenience, comparison and service provision, which is considered sufficient to serve the needs of the surrounding community. The Co-operative foodstore and Iceland are of particular importance in anchoring the centre, and the convenience and comparison goods retail offer is generally more varied and diverse than that found at other district centres in the Borough. Waterloo also benefits from a strong service offer. Whilst Waterloo is the only district centre in Sefton in which the vacancy rate was in excess of the national average at October 2020, this may be a consequence of the large number of units present within the centre.

### Key Findings: Shopping Patterns

- 8.15 A key part of the analysis within this Study is gaining an understanding of how shopping patterns have altered in the last five years, since the previous survey was undertaken to support the 2015 RSR. This analysis enables us to better understand residents' shopping habits and in particular, be able to explore where residents are choosing to shop instead of defined centres (if that is the case).
- 8.16 In respect of convenience goods, the findings that are of greatest relevance to the future retail and centres strategy in Sefton are as follows:
- Overall, the Sefton convenience destinations meet both main and top up food shopping

requirements for Sefton residents in a satisfactory manner;

- For the most central Sefton zones (Zones S, F, C and B), more than nine of every ten main food shopping trips are undertaken to stores within Sefton Borough; for top-up shopping, Sefton's market share is about 90% for Zones S, F, C, B and M); and
- There has however been a shift in convenience goods market share from town centre facilities to out of centre facilities, and a noticeable difference in shoppers' behaviour in those zones where new out of centre discount foodstores have commenced trading since 2015.

8.17 In terms of comparison goods, our assessment has identified that:

- The vast majority of residents in central Sefton zones are able to meet their comparison goods shopping needs within the Sefton authority area (principally at Southport town centre and Aintree Retail Park);
- The overall clothing and footwear market share claimed by Southport town centre has remained broadly consistent over the last five years at 19% now compared to 20% at 2015. However, Bootle town centre's clothing and footwear market share has declined from 6% at 2015 to 2% at 2020;
- Liverpool city centre is still drawing relatively high proportions of clothing and footwear trips away from Zones F, C, B and M in particular, although this proportion has reduced for Zones F, C and B, where Aintree Retail Park now attracts an increased proportion of trips; and
- The Borough's retention level of shopping trips has increased since 2015 for all categories of comparison goods, except chemist goods and DIY goods.

8.18 In addition to the above, by looking at the market share calculated from the available comparison expenditure within the Study Area, we have identified that the proportion of comparison expenditure attracted by facilities in Southport town centre from the Study Area has increased by 0.4 percentage points but the level attracted by the out of centre facilities at Aintree have increased relatively substantially by 6.7 percentage points. However, the proportion of available expenditure attracted to Bootle town centre has reduced since 2015 from 4.7% to 2.4%, indicating a decrease in comparison attraction of the town centre, which corresponds with the overall reduction in comparison offer of the centre.

### Key Findings: Retail Need and Retail Strategy

- 8.19 The floorspace requirements identified in this Study are of some relevance to the determination of future planning applications, as they reflect the additional floorspace that can be accommodated in the Borough whilst allowing existing floorspace to benefit from turnover growth, such that the existing provision continues to trade in a viable manner. However, it is important that the below figures are not interpreted as a 'cap' on development as there is no test of 'need' set out in the NPPF (or in the Sefton Local Plan, adopted April 2017). Instead, future development proposals should be assessed against the relevant policies of the NPPF and the development plan.
- 8.20 As identified at Section 6, there is no identified quantitative requirement for additional convenience goods floorspace in either North or South Sefton across the entire reporting period to 2031.

**Table 8.1: Quantitative Need for Convenience Goods Floorspace in Sefton Borough as Identified by this Update**

	2021 (sq.m)	2026 (sq.m)	2031 (sq.m)
<b>North Sefton</b>			
Minimum Convenience Goods Requirement	-4,300	-4,300	-4,100
Maximum Convenience Goods Requirement	-5,100	-5,200	-5,000
<b>South Sefton</b>			
Minimum Convenience Goods Requirement	-2,800	-2,800	-2,700
Maximum Convenience Goods Requirement	-3,400	-3,400	-3,200

Source: Table 6f and Table 6h, Appendix IV

- 8.21 In terms of the qualitative requirement for additional floorspace within the authority area, it is evident that throughout the Borough (and the country as a whole), shoppers are frequently foregoing the previously dominant 'big four' foodstore operators in favour of discounters. As a consequence of this, we believe that it is highly unlikely that there will be any requirement in the foreseeable future for any further large food superstores in the area. This is consistent with the current strategy of the 'big four' who are currently very circumspect in terms of their appetite to bring forward additional large superstores.
- 8.22 We do, however, note that some Aldi discount foodstores are performing exceptionally well in the Borough. The five Aldi stores in the Borough have a collective convenience goods benchmark turnover of £56.1m and an estimated survey derived turnover of £138.3m; as such, their convenience goods floorspace overtrades by an estimated £82.2m.

8.23 As set out at Section 2 of this report, both Aldi and Lidl have substantially improved their share of the national grocery market in recent years. Notwithstanding this, the very strong performance of Aldi foodstores across the Borough suggests that the market could support more discount foodstore provision. In this regard, we note that the Council has recently approval a proposal for an Aldi discount foodstore in Maghull (planning application reference DC/2020/01437), and that both Aldi and Lidl have further requirements for new stores across the Borough at February 2021.

8.24 Turning to comparison goods, we also identify that there is no need for additional floorspace in both North and South Sefton over the entire reporting period.

**Table 8.2: Quantitative Need for Comparison Goods Floorspace in Sefton Borough as Identified by this Update**

	2021 (sq.m)	2026 (sq.m)	2031 (sq.m)
<b>North Sefton</b>			
Minimum Comparison Goods Requirement	-2,600	-5,300	-5,600
Maximum Comparison Goods Requirement	-4,100	-8,400	-8,800
<b>South Sefton</b>			
Minimum Comparison Goods Requirement	-1,000	-4,400	-4,700
Maximum Comparison Goods Requirement	-1,500	-6,900	-7,400

Source: Table 26f and Table 26h, Appendix IV

8.25 In terms of the qualitative requirement for additional comparison floorspace, the importance and relative dominance of Liverpool city centre and the choice now provided at Aintree Retail Park mean that other centres in South Sefton have a more localised role and function than might otherwise be the case. Whilst we believe that the location of these two destinations is such that they make important contributions to meeting some of Sefton residents' comparison goods needs, it will be important to try and protect and enhance the role of both Southport and Bootle town centre going forward.

8.26 Whilst the overall clothing and footwear retention rate in the Borough has increased slightly since the undertaking of the previous household shopper survey in 2015, this is a consequence of the improved performance of Aintree Shopping Park in this sector. Table 4.8 of this report identifies that Aintree Retail Park's Study Area clothing and footwear market share increased from 13% in 2015 to 23% at 2020. This was partly at the expense of Bootle, which suffered a notable decrease in clothing and footwear market share (from 6% of all such Study Area shopping trips in 2015 to 2% in 2020).

- 8.27 Whilst the survey results suggest that Southport was more resilient (with its clothing and footwear market share decreasing one percentage point to 19% between 2015 and 2020), recent changes in retail representation are in danger of further eroding its long term clothing and footwear retail function.
- 8.28 It will be important to ensure that Bootle and Southport further diversify in order to provide a balanced and relevant offer, which encourages visitors to dwell and use the centre for different activities. However, clothing and footwear will continue to have a place in underpinning the future viability of the Borough's larger town centres. As such, we recommend that careful consideration is given to further proposals which could impact on the viability of Bootle and Southport as retail destinations in order that this function is retained (and, where possible, improved upon).
- 8.29 As such, the current priority is to find new uses for some of the existing stock, bringing back some vacant floorspace into active uses through a mix of residential, leisure and community uses. However, it is important that centres continue to provide that day-to-day retail, leisure and service offer needed by their local catchments and therefore retail and leisure will continue to play an important part in the future health of centres across Sefton.

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