



St. Helens Borough Council

Retail and Leisure Study

Final Report

May 2017

**(Publication date January 2018 to Incorporate the Latest
Experian Data)**



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1.0 Introduction

Instruction

- 1.01 WYG Planning (hereafter referred to as 'WYG') was commissioned by St. Helens Council ('the Council') in June 2016 to undertake a Retail and Leisure Capacity Study for the St. Helens administrative area.
- 1.02 This version of the Study has been published in January 2018 to incorporate the latest Experian release of both population and expenditure but also forecasted growth in expenditure, special forms of trading and sales densities from the Experian Retail Planner Briefing Note 15, both of which were published in December 2017. As such, this latest publication of the Study includes the latest available data to inform the Council's local plan evidence base.
- 1.03 The Study will help inform and advise on the preparation of the forthcoming St. Helens Local Plan, and will also provide baseline information to assist in the determination of planning applications for retail and leisure development. The key purposes of the Study provided are set out at paragraph 4.6 of the Tender Brief of February 2016 and, in summary, comprise:
- a quantitative and qualitative assessment of the Borough's future retail and leisure needs over the forthcoming plan period;
 - consideration of the latest retail and leisure trends, including the implications of special forms of trading;
 - a review of each centre's boundary, function and role within the St. Helens retail hierarchy, and consideration of each centre's ability to accommodate identified retail and leisure needs;
 - health check assessments of key centres; and
 - recommendations in respect of appropriate floorspace thresholds for the application of the retail impact test.
- 1.04 In order to address the above requirements, the Study draws on new empirical research, with NEMS Market Research Limited ('NEMS') undertaking surveys of 1,250 households within the defined Study Area in June 2016. The Study Area for the household survey comprises six zones which are based on postcode sectors grouped to reflect areas which are likely to exhibit broadly similar patterns of shopping behaviour. The household survey allows for a detailed consideration of shoppers' habits and an assessment of the expenditure currently claimed by existing retail venues.



- 1.05 In addition, NEMS also carried out 'in-street' surveys of visitors to St. Helens and Earlestown town centres in June 2016. The in-street surveys assist in the qualitative assessment of the two town centres and provide an indication of where shoppers travel from in order to visit each centre.
- 1.06 In assessing the quantitative needs, the Study draws upon the most recent Experian Micromarketer G3 (MMG3) population and expenditure data (published December 2017) in order to establish the up-to-date position with regard to both convenience and comparison goods capacity.

Structure of Report

- 1.07 Our report is structured as follows:
- Section 2 provides a context for the Study by providing an analysis of key retail and town centre trends;
 - Section 3 considers the up-to-date position in respect of relevant national retail and town centre planning policy;
 - Section 4 presents the key findings in respect of the household and in-street survey research;
 - Section 5 considers the vitality and viability of St. Helen's town, district and local centres;
 - Section 6 identifies current and future population and expenditure levels within the Study Area;
 - Section 7 provides our assessment of the quantitative and qualitative need for further convenience and comparison goods retail floorspace over the assessment period;
 - Section 8 considers the need for additional commercial leisure development; and
 - Section 9 summarises our key findings for St. Helens and sets out our recommendations in respect of its future retail and town centre strategy and planning policies.



2.0 Current and Emerging Retail Trends

Introduction

- 2.01 The retail property landscape across the UK has evolved significantly over the past 50 years, from post-war redevelopment in town centres, through to the emergence of retail warehouse parks and out-of-town regional shopping malls. For most of this period, the retail sector has experienced considerable expenditure growth, which has been attributed to a number of factors, including greater disposable income, availability of credit, new technology and a general overall increase in our standard of living. However, recent economic conditions have had a clear impact on expenditure and per capita convenience goods spending has actually reduced in recent years. The way in which goods are purchased has also altered due to the increased popularity of 'e-tailing', which now claims more than one in every ten pounds spent in the UK.
- 2.02 In order to set out the wider context for the Study, we provide an overview of prevailing retail and leisure trends below.

Polarisation and the Decline of Secondary Centres

- 2.03 In recent years, shoppers have been increasingly prepared to travel in order to access a greater choice of shops and the type of leisure facilities which are more commonly available in larger towns and cities. As a consequence, larger retail venues (with a regional or sub-regional role) have tended to perform relatively strongly, but a number of smaller towns (particularly those proximate to larger centres) have fared less well. The performance of many smaller towns has also been particularly impacted upon by the recession and the growth of internet shopping, which has resulted in many operators believing that they can achieve appropriate nationwide coverage with a smaller number of stores.
- 2.04 Colliers¹ reports that many retailers are focused on a much smaller portfolio of stores to cover main markets and to complement online sales. As such, Colliers indicates that new and emerging retailers frequently target no more than 50 stores in key locations and, as a consequence, this trend is having an impact on take-up levels in shopping centres.

¹ Midsummer Retail Report 2014, Colliers, July 2014



- 2.05 It is also evident that certain operators – including the Arcadia Group, through its Outfit format which incorporates Topshop, Topman, Miss Selfridge and others – are sometimes prepared to close stores in smaller centres in favour of representation on a retail park. We also note the increasing preference of fast food operators to incorporate 'drive thru' restaurants, which has resulted in the closure of 'in centre' McDonald's restaurants in some centres. Furthermore, in November 2016, Marks & Spencer announced its intention to close up to 30 stores and relocate or downsize a number of others. The changes will result in clothing being sold in a lesser number of Marks & Spencer stores.
- 2.06 Such changes can result in particularly significant impacts at smaller town centres, which tend to be the subject of higher vacancy rates, and which have also often suffered related reductions in rental levels and footfall in recent years. As a consequence, a greater proportion of comparison goods expenditure is being claimed by a smaller number of centres of sub-regional or regional importance.
- 2.07 However, such changes have also brought forward opportunities for different types of retailer. Some available units in smaller centres have been re-occupied by household discounters such as B&M Bargains, Poundland, Poundstretcher and Wilkinson's. Whilst such lettings are valuable in bringing back premises into active use, many smaller centres are heavily reliant on such retailers, which are generally operated at the lower end of the market.
- 2.08 It is also evident that some centres are seeking to 'reinvent' themselves through an increased focus on quality independent and food and drink operators. Towns are also increasingly valuing their market as a means to differentiate themselves from retail parks and superstores, and many markets are looking to contemporary and speciality retailers to create interest and draw customers in. The greatest opportunities for successful vintage, craft and food and drink markets have so far been in centres served by affluent catchments.



The End of the 'Big Four' Space Race and the Rise of the Discounter

- 2.09 Shoppers have turned away from food superstores in recent year and Mintel² suggests that this decline is such that it cannot be considered a 'blip'. Mintel attributes the problems which face superstores to two principal factors.
- 2.10 Firstly, many young people are choosing to rent within or close to town and city centres. As a consequence, many undertake sporadic food shopping and often eat out, use takeaways, or buy instant meals. Accordingly, when young people undertake food shopping, they often have no greater need than that which can be serviced by a convenience store.
- 2.11 The second factor is the growth of discount operators, which have become more mainstream in both their offer and market positioning. Mintel suggests that the improvements in discounters' offer – such as wider ranges, better fresh foods and more premium foods – means that they have become an attractive alternative to both large food superstores and to convenience stores.
- 2.12 As a consequence, the 'big four' foodstore operators (Asda, Morrisons, Sainsbury's and Tesco) have become circumspect in respect of new store openings and, indeed, have closed a number of existing stores. All four have suffered significant declines in their market share over the past four or five years. As Table 2.1 below indicates, Tesco has suffered a 2.1 percentage point reduction in its share of the food retail market between 2011 and 2016, and Morrisons has suffered a 1.8 percentage point reduction in market share. Considered together, the market share of the big four foodstore operators has declined from 58.5% in 2011 to 52.7% in 2016 (a reduction of 5.8 percentage points). In contrast, other retailers – most notably Aldi and Lidl – have benefitted from increases in their market share. Aldi's market share increased from 1.9% to 5.3% (equating to an increase of 3.4 percentage points) between 2011 and 2016.

² 'UK Retail Rankings', Mintel, April 2016



Table 2.1: Market Share of Key UK Food Retailers

Operator	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, Verdict, November 2016

- 2.13 The most notable expansion strategy pursued by any of the big four operators in recent years relates to Sainsbury's decision to enter the discount market through a partnership with Netto. Netto announced the trialling of 15 stores in November 2014 clustered around the M62 corridor between Liverpool and Hull in order to 'test the water'. The first two new build openings were announced in March 2015 in Lymm and Hull, which appeared to suggest confidence in the venture. However, following the trial, Netto announced in July 2016 that it would close all its UK stores by August 2016.
- 2.14 For the most part, the current strategy of the big four operators involves the reconfiguration and refurbishment of existing stores. In some cases, product lines are being reduced and pricing is being made straightforward. Some operators are looking to introduce other uses to take existing floorspace and Sainsbury's acquisition of the Home Retail Group in September 2016 allows it to introduce Argos (which it now owns) into its stores. Small concessions of Habitat are also currently being tested within five branches of Sainsbury's.
- 2.15 Aldi and Lidl have both sought to take advantage of the structural changes in the food retail market and have announced ambitious store opening targets that will further increase pressure on the big four operators. Aldi has identified major expansion plans and intends to open 80 new UK stores in 2016³, bringing its total number of stores to around 700. Over the longer term, it intends to trade

³ Article headlined 'Aldi to roll out 80 new UK stores in 2016', Retail Week, 17 February 2016



from 1,000 UK stores by 2022⁴. Aldi's plans include three formats: standard stores of between 18,000 sq.ft and 20,000 sq.ft with a minimum of 70 parking spaces; the 'Small Aldi' format of between 10,000 sq.ft and 14,000 sq.ft with a minimum of 40 parking spaces; and, the 'City Aldi' format of between 7,000 sq.ft to 10,000 sq.ft with no parking spaces required. Aldi is understood to be considering all types of property, including development sites, mixed-use schemes, retail parks, high streets, shopping centres and roadside.

- 2.16 Lidl plans to expand to trade from a portfolio of 1,200 UK stores in the coming years⁵. Lidl's future requirements reportedly⁶ comprise units of between 20,000 sq.ft and 30,000 sq.ft, with sites of 1.5 acres required for standalone units and up to 4 acres for mixed-use schemes.

Special Forms of Trading

- 2.17 Many consumers who previously shopped in town centres and at retail parks are now increasingly using the internet to make purchases. Experian⁷ identifies that 'special forms of trading' (which includes internet, mail order and market sales) now comprises an estimated 14.3% of total UK retail sales at 2016, which compares to a market share of just 5.6% at 2006. Experian estimates that the value of non-store sales in the UK at 2016 is £53.8 billion. It estimates that special forms of trading will increase further to 18.3% of retail expenditure at 2021. Thereafter, it is anticipated that additional growth will be relatively limited, with special forms of trading claiming 19.6% of UK retail expenditure at 2035 (the last reporting year for which Experian provides a figure).
- 2.18 The growth in internet as a sales medium has been enabled by the increase in access to the internet by UK households, which the Office for National Statistics⁸ reports increased from 57% of households at 2006 to 89% in 2016. The proportion of households with access to the internet is expected to increase further over the coming years and the popularity of shopping online is also assisted by mobile phones and tablets with faster 4G network technology. The Office for National Statistics indicates that the proportion of adults accessing the internet using a mobile phone increased by nearly double – from 36% to 66% – between 2011 and 2015.

⁴ Article headlined 'Supermarkets: discounters race for space', Property Week, 2 November 2016

⁵ 'UK Food & Grocery Retailer Update', Verdict, November 2016

⁶ Article headlined 'Supermarkets: discounters race for space', Property Week, 2 November 2016

⁷ 'Experian Retail Planner Briefing Note 15', December 2017

⁸ 'Statistical Bulletin: Internet Access Households and Individuals', Office for National Statistics, August 2016



- 2.19 It is evident that improvements in technology and an increased confidence in the security of online payments have supported substantial increases in internet sales in recent years. In addition, the option of using the internet to 'click and collect' in-store at a dedicated counter is also increasing in popularity, with the service now accounting for over 50% of John Lewis internet orders⁹. Some retailers are also seeing benefits arising from the use of shops as 'showrooms' where shoppers can view and try goods before making purchases later in their home. More progressive retailers are also providing in-store Wi-Fi (which can be used to inform shoppers of promotions via their mobile phones) and technology points (which can allow shoppers to browse a wider product range than that carried in store). Accordingly, whilst new technology and the rise of internet shopping undoubtedly provides challenges for traditional 'bricks and mortar' retailers, it also brings with it some opportunities.
- 2.20 In addition, it is important to note that many purchases made online are actually sourced from the shelves of 'bricks and mortar' stores and thereby have the potential to support retail floorspace. This is acknowledged by Experian which now provides adjusted market share figures for special forms of trading in order to reflect purchases which are effected through stores. The adjusted allowance for special forms of trading equates to 3.2% for convenience goods at 2017, increasing to 3.9% at 2021, to 4.6% at 2026, to 5.1% at 2031, and to 5.3% at 2035. For comparison goods, the adjusted allowance is 14.8% at 2017, increasing to 16.9% at 2021 and 17.5% at 2026, and then increasing slightly to 17.8% at 2031 and 18.0% at 2036. The adjustment is greater for convenience goods, reflecting the fact that most online food purchases are taken from the shelves of actual stores.

Leisure and the Appetite for More Food and Drink

- 2.21 In recent years, town centres have also increasingly relied upon an expanding food and drink sector to bring some vacant units back into active use. Eating out has become increasingly popular and both national multiples and independents have benefitted from the additional expenditure which has resulted. Colliers¹⁰ refers to Barclaycard data which identifies that spending in restaurants in the first quarter of 2015 was up 17% year-on-year.
- 2.22 Food operators increasingly require units which are in amongst the retail heart of a centre, rather than taking space within a food court. As a consequence, modern shopping mall developments tend to mix

⁹ 'Click and Collect', Mintel, September 2014

¹⁰ 'Midsummer Retail Report 2015', Colliers International, July 2015



food operators within the wider offer and upwards of a quarter of units can be occupied by cafes and restaurants. Food and drink operators (particularly national multiples) can be particularly attractive to landlords as long leases can often be agreed to due to the cost of fit-outs.

- 2.23 Colliers¹¹ also reports that cinema openings are on the up and that niche cinema operators, such as Everyman, Curzon and The Light, are considered to have the potential to be particularly complementary to shopping environments. Such cinemas have more modest land take requirements than large multiplexes, and therefore may have a greater chance of being incorporated in a mixed-use development.
- 2.24 The health and fitness sector has been buoyed by the popularity of budget gyms. Operators such as Pure Gym, the Gym Group and easyGym have an operational model which is based on low costs and high volume. Such gyms tend to have plenty of equipment in order to encourage uses, but are characterised by basic fit-outs and limited staff. Many budget gym operators – including Pure Gym and the Gym Group – are actively seeking to bring forward additional facilities, with a wide range of properties (including old theatres, larger shop units and office space) having the potential to meet their needs. The Leisure Database Company¹² suggests that there were around 300 budget gyms across the country in summer 2016, but that this figure has the potential to increase to around 1,000 in the near future.
- 2.25 There are a number of emerging leisure concepts which are also helping to anchor retail environments, including bowling alleys, trampolining and crazy golf. These concepts can assist centres in providing a point of difference with the competition, ensure that visitors' dwell times are increased, and assist a town's evening economy.

Brexit

- 2.26 The referendum in June 2016 on the UK's membership of the European Union resulted in a majority vote to leave the EU. The terms of withdrawal are to be negotiated with the Commission within two years of formal notification by the Government. A number of commentators have forecast that

¹¹ Ibid

¹² As reported in the article headlined 'Why budget gyms could be set to take over the sector', Sports Insight, 11 June 2016



uncertainty during this time will negatively impact upon consumer confidence and expenditure, and that investor decisions may be put on hold.

2.27 Whilst it would appear that the short term impact of 'Brexit' on the retail and leisure sector have perhaps been more modest than some analysts suggested, Verdict published an Economic & Retail Update in September 2016¹³ in order to highlight potential future issues. Its Update provides the following forecasts.

- Retail growth across Britain in 2016 is expected to be flat and growth in the clothing and footwear sector as a whole is likely to be disappointing. However, the weaker pound means that international travellers may spend more, with international brands and premium goods being particularly attractive.
- However, a weaker pound will also lead to higher import and manufacturing costs, which retailers will pass onto consumers. Verdict anticipates that the food and clothing and footwear sectors will see the greatest inflationary rises.
- Brexit may have a negative impact on the housing market and a consequential adverse impact on those retailers who rely on householders investing in their property. Accordingly, there may be less spending on goods such as furniture, floor coverings, DIY and gardening goods and so on.
- In volume terms, Verdict expects little change to the food retail sector, but notes that inflationary pressures might mean than shoppers spend more on their groceries and therefore have less to spend on other goods.

2.28 It is therefore evident that Brexit has the potential to impact on future expenditure growth (and also on population growth). As such, there will be a need to monitor the impacts arising from the UK's exit from the EU and for any future update to this Study to take appropriate consideration of such changes.

¹³ 'Economic & Retail Update: H2 2016', Verdict, September 2016



Summary

- 2.29 In summary, it is evident that the retail market has undergone significant changes in recent years. Wider economic conditions facing the UK have led to a marked decline in some previously healthy town centres, as well as other traditional retail formats. This has principally been caused by a decline in available expenditure, due to suppressed disposable incomes and an increase in the proportion of expenditure committed online.
- 2.30 However, 2016 saw an increase in consumer confidence, mainly driven by an improved economic outlook as a result of falling unemployment and the availability of credit. As a consequence, it is anticipated that expenditure growth rates will increase moving forward. Whilst such forecasts remain below those achieved before the recession, they are significantly higher than those recorded over the last three or four years. Notwithstanding this, in June 2016, the referendum on the UK's membership of the European Union resulted in a majority vote to leave the EU. A number of commentators have forecast that the uncertainty brought about by this decision will impact negatively upon consumer confidence, at least in the short term.
- 2.31 The growth in online sales has affected the need for new retail floorspace. However, increased expenditure growth allied with the retail industry embracement of innovative multi-channelling retail strategies, provides an opportunity for town centres to widen their audience in the future and retain ground. The ability for centres to 'move with the times' and utilise modern technology, whilst providing a materially different experience to online shopping (partly through the inclusion of leisure and food and drink provision), will help ensure their ongoing vitality and viability.



3.0 Planning Policy Context

Introduction

- 3.01 Given that this Study seeks to provide important evidence to assist in the production of future retail planning policy, it is necessary to review existing national planning policy of relevance to retail and town centre matters to explore the context for the Study and how it may impact upon the production of future development plan policy. We also summarise St. Helens' adopted and emerging planning policy, insofar as it is relevant to retail and other town centre matters, in order to consider the Council's strategy in respect of its centres.

National Planning Policy Framework

- 3.02 The National Planning Policy Framework was published in March 2012. The NPPF replaced all former Planning Policy Statements, Planning Policy Guidance Notes and some Circulars in a single consolidated document.
- 3.03 The main theme of the NPPF is that there should be 'a presumption in favour of sustainable development'. In terms of plan-making, it is stated that local planning authorities should positively seek opportunities to meet the development needs of their area, with an emphasis on Local Plans having sufficient flexibility to adapt to rapid change.
- 3.04 In terms of economic development, it is set out within the NPPF's core principles that planning should proactively drive and support economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs. Every effort should be made to objectively identify and then meet the business and other development needs of an area, with positive responses made to wider opportunities for growth.
- 3.05 The NPPF stresses the Government's commitment to securing economic growth in order to create jobs and prosperity, with paragraph 17 stating that the planning system should do everything it can to support sustainable economic growth.
- 3.06 Paragraph 19 indicates that planning should operate to encourage and not to act as an impediment to sustainable growth, and that significant weight should be placed on the need to support economic growth through the planning system. The NPPF seeks to ensure that local planning authorities plan



proactively to meet the development needs of business and support an economy fit for the 21st century.

3.07 The NPPF still recognises the need to promote the vitality and viability of towns and cities through the promotion of competition and growth management during the plan period. Paragraph 23 of the NPPF provides guidance for local planning authorities in drawing up Local Plans, it indicates that they should:

- recognise town centres as the heart of their communities and pursue policies to support their vitality and viability;
- define a network and hierarchy of centres that is resilient to anticipated future economic changes;
- define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;
- promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
- retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
- allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centre. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Local planning authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites;
- allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;
- set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
- recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites; and
- where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.



- 3.08 Paragraph 23 also indicates that needs for retail, leisure, office and other main town centre uses should be met in full and should not be compromised by limited site availability.
- 3.09 Paragraph 24 requires local planning authorities to adopt a sequential approach to the consideration of planning applications for main town centre uses that are not in an existing centre or in accordance with an up-to-date Local Plan. The following paragraph 25 indicates that that the sequential approach should not apply to applications for small scale rural offices or other small scale development.
- 3.10 Paragraph 26 indicates that local planning authorities should require an impact assessment for retail, leisure and office development outside of town centres which are not in accordance with an up-to-date Local Plan and if the development is over a proportionate, locally set threshold. Where there is no locally defined threshold, the default threshold will be 2,500 sq.m.
- 3.11 Paragraph 27 indicates that where an application fails to satisfy the sequential test or is likely to have a significant adverse impact on the vitality and viability of a town centre or on existing, planned, committed investment in a centre it should be refused.
- 3.12 The NPPF also recognises that retail activity should still, where possible, be focused in existing town centres. Retail and leisure proposals which cannot be accommodated in or adjacent to the town centre will have to satisfy a dual impact test and the sequential test.

Ensuring the Vitality of Town Centres Planning Practice Guidance

- 3.13 Ensuring the Vitality of Town Centres National Planning Practice Guidance was published in March 2014 and replaces the previous Planning for Town Centres Practice Guidance. It provides a more concise summation of how retail and main town centre planning policy is to be applied in practice. However, the objectives of the Practice Guidance remain comparable with those of its predecessor, with there being a stated requirement for local planning authorities to plan positively and support town centres to generate local employment, promote competition within and between town centres, and create attractive and diverse places for users.
- 3.14 The Practice Guidance requires local planning authorities to fully assess and plan to meet needs for main town centre uses through the adoption of a 'town centre first' approach. Paragraphs 002 and 003 confirm that this should be delivered through a positive vision or strategy which is communicated through the development plan. The strategy should be facilitated through active engagement with the



private sector and other interested organisations (including Portas Pilot organisations, Town Teams and so on). Any strategy should be based on evidence which clarifies the current state of town centres and opportunities to meet development needs and support centres' vitality and viability.

3.15 Such strategies should seek to address the following matters:

- the appropriate and realistic role, function and hierarchy of town centres in the area of over the plan period, including an audit of the vitality and viability of existing town centres and their ability to accommodate new development;
- consideration of the vision for the future of each town centre and the most appropriate mix of uses;
- the assessment of the scale of development that a town centre can accommodate;
- the timeframe for new retail floorspace to be delivered;
- what other complementary strategies are necessary or appropriate to enhance the town centre to deliver the vision in the future; and
- the consideration of the enhancement of car parking provision including charging and enforcement mechanisms.

3.16 Paragraph 005 of the Practice Guidance identifies a series of key indicators which are of relevance in assessing the health of a centre over time. Paragraph 005 goes on to state that not all successful town centre regeneration initiatives have been retail led or focused on substantial new development, but have instead involved improvements such as renewed public realm, parking, and accessibility and other partnership mechanisms.

3.17 Paragraph 009 reaffirms the town centre first policy in the form of the sequential test, which requires local planning authorities to undertake an assessment of candidate sites' availability, suitability and viability when preparing their local plan. Such an assessment should also consider the scale of future needs and the type of land required to accommodate main town centre uses.

Housing and Economic Development Needs Assessment Planning Practice Guidance

3.18 The Government has issued further Practice Guidance to provide specific instruction in respect of the undertaking of needs assessments (including those for main town centre uses). Paragraph 032 of the Housing and Economic Development Needs Assessments Planning Practice Guidance states that plan



makers should consider forecasts of quantitative and qualitative need based on a range of data which is current and robust. Local planning authorities will need to take account of business cycles and make use of forecasts and surveys to assess employment land requirements.

Relaxation of Permitted Development Rights

- 3.19 At a national level, recent changes to the Town and Country Planning (General Permitted Development) Order 1995 have sought to support the diversification and vitality of town centres. The changes follow the Portas Report recommendation to make it easier to change surplus space in order to provide for the effective re-use of buildings.
- 3.20 The Town and Country Planning (General Permitted Development) (England) Order 2015 came into force on 15 April 2015. The Order acts, *inter alia*, to consolidate and replace the Town and Country Planning (General Permitted Development Order 1995) and to provide additional permitted development rights. It should be noted that conditions and restrictions apply, and that prior approval is generally required in order to implement development. The new rights include:
- a permitted change of use from retail/financial services (Class A1/A2), betting offices and pay day loans shops to residential (Class C3);
 - a permitted change of use from amusement arcade/casino (sui generis use) to residential use (Class C3);
 - a permitted change from retail (Class A1) to financial services (Class A2);
 - a permitted change from retail/financial services (Class A1/A2) to food and drink (Class A3);
 - a permitted change from retail/financial services (Class A1/A2), betting offices, pay day loan shops and casinos to assembly and leisure uses (Class D2);
 - an extension of the temporary permitted development rights introduced in May 2013 for extensions to shops, offices, industrial and warehouse buildings to support business expansion and the economy so they apply permanently;
 - the erection of click and collect facilities within the curtilage of a retail shop; and
 - modifications to the size of an existing retail shop loading bay.
- 3.21 The Town and Country Planning (General Permitted Development) (England) (Amendment) Order 2016 subsequently came into force on 6 April 2016. The Amendment provides for the change of use of launderettes to residential uses as permitted development, and acts to make permanent previous temporary provisions which permit the change of use from office to residential use. A condition



allowing the local planning authority to consider noise impacts on the intended occupants of the development from premises in commercial use is included in the extended right.

- 3.22 The intended consequence of the above measures is to secure the redevelopment and reuse of premises. It is considered that the relaxation in respect of changes of use to residential are more likely to encourage re-use of offices in larger metropolitan areas which may benefit from a greater supply of office buildings.

St. Helens Council Development Plan Policy

- 3.23 The adopted development plan for St. Helens currently comprises the Core Strategy Local Plan (adopted in October 2012), read together with the 'saved' policies of the St. Helens Unitary Development Plan (adopted in July 1998) and the Joint Merseyside and Halton Waste Local Plan (adopted in July 2013). However, the Waste Local Plan is not of direct relevance to this Study.

St. Helens Core Strategy

- 3.24 The Core Strategy is the principal document guiding how decisions are made on planning applications across the Borough. It provides an overall strategy of how much development is required, where development should be located and how this will be delivered in the period up to 2027. It contains strategic policies for housing, economy and employment, community facilities, quality of life and accessibility.
- 3.25 The overall Core Strategy Spatial Vision states that, by 2027, St. Helens will be a regenerated Borough which takes advantage of its location between Liverpool and Manchester, and has a vibrant economy, a healthy, safe and attractive environment, and inclusive, sustainable communities. The Spatial Vision identifies that the town centre and its surrounding area will be the vibrant focus of the Borough, with expanded shopping and leisure facilities, a new stadium for St. Helens Rugby League club and a redeveloped college.
- 3.26 Policy CSS 1 sets out the overall Spatial Strategy for the Borough. In terms of defined centres and economic development, the Spatial Strategy identifies that:
- Much of all new development will be directed towards the regional town of St. Helens;
 - St. Helens town centre will enhance and protect its market share within the region by securing further retail and leisure development opportunities. Applications for main town centre uses

providing greater than 500 square metres gross floorspace in an edge-of-town centre or out-of-town centre location will require an impact assessment;

- Earlestown will remain the second Town Centre within the Borough, whilst Rainhill and Thatto Heath will be classed as district centres. Applications for main town centre uses providing greater than 300 square metres gross floorspace in an edge-of-district centre or out-of-district centre location will require an impact assessment; and
- The following will serve as local centres: Billinge; Chain Lane; Chancery Lane; Clipsley Lane; Eccleston; Fingerpost; Marshall's Cross; Newton-le-Willows; Newtown; Rainford; Sutton; and Denton's Green. Applications for main town centre uses providing greater than 200 square metres gross floorspace in an edge-of-local centre or out-of-local centre location will require an impact assessment;

3.27 Policy CAS 1 sets out the St. Helens Core Area Strategy. Part 6 of the policy identifies that the district centre of Thatto Heath and existing local centres will be protected, and opportunities for the clustering of activities will be encouraged.

3.28 Policy CAS 2 relates to St. Helens Central Spatial Area Strategy and seeks to enhance the area as an accessible and welcoming destination for shopping, leisure, culture, tourism, employment and housing within a high quality built environment. The policy indicates that St. Helens will maintain its position in the regional hierarchy and, where possible, enhance its market share by, *inter alia*:

- Providing around 20,000 sq.m (net) of additional comparison retail floorspace. The Council's preference is for this to be through the redevelopment of the former Tesco superstore site on Chalon Way, the enhancement of the existing Church Square shopping centre and/or the development of other sequentially preferable sites in line with national policy and Policy CSS 1;
- Relocating the Tesco superstore to the former United Glass site to cross fund the construction of a new Rugby League Stadium on the same site;
- Facilitating linked trips between the primary shopping area and other existing and proposed developments within the St. Helens Central Spatial Area, including Asda, the former Tesco superstore site on Chalon Way, the stadium site, and St. Helens and Ravenhead Retail Parks;
- Encouraging the development of previously developed land for mixed uses including high density residential in and around, and office development in and around, the town centre;
- Supporting the delivery of new health facilities in partnership with the PCT and other health service providers;
- Monitoring vitality and viability through undertaking regular Town Centre Health Checks;

- Reviewing appraisals of the Town Centre Conservation Areas and implementing management plans through the St. Helens Central Spatial Area Action Plan;
- Defining the primary retail frontage, primary shopping area and town centre boundaries in accordance with national policy and ensuring the primary retail frontage is predominantly used for retail purposes;
- Securing opportunities to improve the St. Helens Central Spatial Area's public realm by retaining and enhancing the existing waterway of the St. Helens Canal and securing improvements to Green Infrastructure;
- Managing pedestrian and vehicular accessibility to meet the varying demands of the town centre by:
 - a. Maintaining pedestrian priority within the town centre and extending links to adjacent growth areas;
 - b. Supporting the town centre as the hub of the public transport network in St. Helens; and
 - c. Reducing congestion and maintaining access by managing the demand for long stay car parking in accordance with the emerging St. Helens Car Parking Strategy; and
- Preparing a St. Helens Central Spatial Area Action Plan to direct the location, design, access and phasing of new development in the Central Spatial Area.

3.29 Policy CAS 3.1 sets out the strategy for Newton-le-Willows and Earlestown. In relation to the town centre, the third criterion identifies that the function of Earlestown town centre as the second largest retail centre in the Borough will be safeguarded through the production and implementation of an Area Action Plan.

3.30 Policy CAS 4 provides the strategy for Haydock and Blackbrook. The policy provides specific guidance on defined centres and the third policy criterion states that:

'The continued function of Clipsley Lane as a Local Centre will be supported and enhanced via appropriate development. Further analysis of this centre and its potential future status will be carried out. Any changes to the Borough's retail hierarchy will be made as a future revision to the Core Strategy.'

[St. Helens Unitary Development Plan](#)

3.31 The St. Helens UDP was originally adopted in July 1998 and, at the time, replaced all previous plans including the Merseyside Structure Plan, Local Plans for Newton-le-Willows, Sutton and the town centre. The majority of the policies within the UDP were saved indefinitely from September 2007 by



the Secretary of State. However, following the adoption of the Core Strategy in 2012, several policies were replaced. We provide a summary of the relevant saved policies below.

- 3.32 Policy RET 1 relates to 'retail development in existing centres'. The policy states that retail development and associated service uses in, or immediately adjacent to, an established shopping centre as shown on the proposals map and listed in Schedule 2 will be permitted, subject to there being no conflict with other plan proposals and policies and provided that the site has good access to the highway network and that the layout provides adequate car parking, cycle parking and servicing arrangements. Schedule 2 then sets out the hierarchy of shopping centres (this has since been updated by Policy CSS 1 of the Core Strategy).
- 3.33 Policy RET 4 relates to hot food shops, restaurants and cafes. The policy states that the building or change of use of establishments to provide hot food for consumption on or off the premises will only be permitted where certain criteria (which principally seek to protect the amenity of local residents) are met.

St. Helens Council Emerging Development Plan Policy

- 3.34 With the exception of the Waste Local Plan, the new Local Plan for St. Helens will replace all existing Local Plans on its adoption. The new Local Plan will set how much new development for housing, employment and other uses should take place in the Borough. It will identify where new development should take place and set out the policies for assessing planning applications.
- 3.35 The Council published the Local Plan 'Scoping' Consultation Document in January 2016, and a public consultation was held between 20 January 2016 and 2 March 2016. The new Local Plan will contain a vision which will set out how the Borough and the places within it should develop. In terms of retail and commercial leisure land requirements, paragraph 7.21 of the consultation documents states that:
- 'The most recent St. Helens and Earlestown Retail & Town Centre Uses Study (2011) concluded that 20,000 square metres of new floorspace for comparison goods (i.e. not food) is required in St. Helens Town Centre up to 2027.'**
- 3.36 In December 2016 the Council published the Local Plan Preferred Options and a public consultation was held between 5th December 2016 and 30th January 2017. The Preferred Options sets out the Council's preferred policy approach concerning retail and commercial leisure along with draft town,



district and local centre boundaries having considered the initial findings of an earlier draft of this study.

- 3.37 Accordingly, the Local Plan is still emerging and does not yet provide policies upon which weight can be placed for development management purposes.



4.0 Original Market Research

Introduction

- 4.01 The undertaking of original market research enables in-depth analysis at a local level and allows the evaluation of the turnover and trade draw of particular town centres. The use of specifically commissioned and tailored survey research is fundamental to identifying the likely capacity for future retail floorspace across the Study Area. Notwithstanding this, WYG acknowledges that there can be limitations to survey research, particularly with regard to the sample size which can be achieved, and the results should therefore be taken to be a broad indication of consumer preferences.
- 4.02 A key requirement of this Study is the detailed understanding of shopping patterns in terms of the use of retail centres and the identification of the centres' catchment areas. WYG commissioned specialist market researchers NEMS to undertake a comprehensive household telephone survey to identify consumers' habits and preferences in the Study Area. In addition, in order to gain a greater understanding of the role and function of St. Helens town centre (and identify from where the town centre draws its custom) an in-street survey of shoppers and visitors has also been undertaken.
- 4.03 We set out the general methodological approach to the surveys and the key results below.

Household Survey

- 4.04 In June 2016, a survey of 1,250 households was undertaken across the defined Study Area which comprises six separate zones and which stretches some distance beyond the St. Helens administrative boundary to incorporate outlying areas. Residents of these outlying areas also look to facilities within the authority areas to meet some retail and leisure needs. The Study Area therefore incorporates areas such as Golbourne, Prescot and Warrington.
- 4.05 Zone 1 of the Study Area incorporates St. Helens town centre and Thatto Heath district centre, Zone 3 incorporates Newton-le-Willows local centre and Earlestown town centre, and Zone 5 incorporates Rainhill district centre.
- 4.06 Table 4.1 below sets out the postcode sectors which comprise each zone and a map of the catchment is provided at Appendix 1. The questions and full tabulation of results from the household survey are provided at Appendix 2.



Table 4.1: Postcodes by Survey Zone

Survey Zone	Postcode Sectors
Zone 1	WA9 1, WA9 2, WA9 3, WA9 4, WA9 5, WA10 1, WA10 2, WA10 3, WA10 4
Zone 2	WA3 1, WA3 2, WA3 3, WA11 0, WA11 9, WN4 0, WN4 8, WN4 9, WN5 7
Zone 3	WA12 0, WA12 8, WA12 9
Zone 4	WA2 0, WA2 7, WA2 8, WA2 9, WA5 0, WA5 3, WA5 4, WA5 6, WA5 7, WA5 8, WA5 9, WA55 1
Zone 5	L34 1, L34 2, L34 3, L34 5, L34 6, L35 0, L35 1, L35 2, L35 3, L35 4, L35 5, L35 6, L35 7, L35 8, L35 9, WA8 3, WA8 5
Zone 6	WA10 5, WA10 6, WA11 7, WA11 8, L33 3, L33 4, L33 7, L34 0, L34 4, L34 7, L34 8, L34 9, L39 0, L70 2

- 4.07 The results of the household survey are utilised to calculate the expenditure claimed by each existing retail facility within the Study Area, a process which is considered in Section 7 of this report.
- 4.08 The household survey is also of assistance in identifying the market share claimed by specific retail destinations, the frequency of visit to purchase various types of goods, the incidence of linked trips, the most popular means of accessing town centre facilities, the use of other town centre facilities, and so on.
- 4.09 In considering the market share of trips secured by specific retail destinations, we are able to compare the results from the 2016 survey with the results from the 2011 NEMS survey. The 2011 survey was undertaken across the same six zones, and a total of 1,000 households were questioned on their shopping and leisure habits. This enables us to consider how shopping habits have evolved over time.
- 4.10 Our market share analysis utilises the same NEMS dataset that is relied on in assessing quantitative need and therefore our commentary relates to tangible retail destinations only (in other words, expenditure which is committed through the internet and other special forms of trading does not form part of the market share element of the commentary that follows). The analysis that follows relates to the market share of *trips* to undertake particular types of shopping at particular destinations and is not necessarily reflective of the market share of overall Study Area *expenditure* secured by those same destinations.
- 4.11 In our view, the consideration of market share of trips (rather than market share of expenditure) is of particular interest as it accurately allows changes in customers' shopping habits to be monitored over time. Accordingly, we consider below the market share of trips to particular retail venues and defined

centres to purchase both convenience goods and comparison goods. For convenience goods, respondents were questioned in respect of where they last visited and where they visited 'the time before last' to undertake 'main' food shopping (which may take the form of a large 'trolley' shop and be undertaken on a weekly basis) and 'top up' food shopping (which will generally be undertaken on a more frequent basis and will involve the purchase of grocery staples, such as milk and bread). For comparison goods, respondents have been questioned in respect of where they last visited to purchase eight separate types of comparison goods.

Convenience Goods Shopping Patterns

- 4.12 As we have explained, the market share analysis which follows relates to shopping *trips* only. However, we give some consideration to the market share of *expenditure* at Section 7 of this report.
- 4.13 In terms of the justification for some of the changes in retail venues' market share figures between 2011 and 2016, it is important to take note that new retail development has taken place since the previous household survey was undertaken. Since the previous household survey was undertaken in 2011, there have been improvements to the provision of convenience shopping facilities in the Borough, most notably in respect of:
- the Tesco Extra superstore at Linkway (relocation from Chalon Way), to the south of St. Helens town centre (which provides a total floorspace of 13,885 sq.m gross);
 - the Aldi foodstore at Linkway West, to the west of St. Helens town centre (1,413 sq.m gross);
 - the Aldi foodstore at Clock Face Road, which was built on the site of the former local centre (1,526 sq.m); and
 - the new Co-op foodstore on Elton Head Road (548 sq.m gross).
- 4.14 Table 4.4 below sets out the market share in each zone which is claimed by convenience goods retailers within St. Helens Borough. The highest St. Helens Borough market share is secured in Zone 1, where such retailers claim 95.3% of the main food trips and 98.2% of the top-up food trips. This is to be expected, as Zone 1 is centrally located and is almost wholly within the Borough's administrative boundary. The Asda at Kirkland Street is the most popular main food shopping destination for residents of Zone 1, attracting a market share of 20.0% of such trips which originate within the zone. In second position is the Morrisons at Boundary Road, which secures 15.6% of main food trips originating in Zone 1.
- 4.15 The zone for which St. Helens Borough secures the lowest convenience goods market share is Zone 4, where just 8.0% of main food trips and 7.3% of top-up trips are directed to facilities within the



Borough. Again, this is expected due to Zone 4 being located almost entirely outside of the Borough boundary. For Zone 4 residents, the most popular store for main food shopping is the Asda at Westbrook Centre in Warrington, which claims 23.3% of main food trips originating from within the zone.

Table 4.4: St. Helens' Main and Top-up Convenience Market Shares by Zone (2011 and 2016)

Zone	2011 Market Share (%)		2016 Market Share (%)		Change 2011-2016 (%)	
	Main Convenience	Top-up Convenience	Main Convenience	Top-up Convenience	Main	Top-up
Zone 1	89.4%	97.8%	95.3%	98.2%	5.90	0.4%
Zone 2	52.3%	57.7%	61.2%	64.6%	8.9%	6.9%
Zone 3	69.4%	91.5%	64.2%	71.2%	-5.2%	-20.3%
Zone 4	5.1%	5.0%	8.0%	7.3%	2.9%	2.3%
Zone 5	30.7%	27.3%	30.3%	11.3%	-0.4%	-16.0%
Zone 6	69.4%	79.7%	78.9%	88.9%	9.5%	9.2%
Total	49.5%	55.3%	54.5%	58.7%	5.0%	3.4%

- 4.16 When comparing the above figures with the results from the 2011 household survey, it is evident that the Borough's market share of both main food and top-up food shopping trips which originate from Zones 1, 2, 4 and 6 has increased. The market share secured by the Borough's facilities in Zones 3 and 5 has decreased for both main food and top-up shopping; the decline in the Borough's market share of top-up food shopping trips is particularly notable, with a decrease of 20.3 percentage points evident in Zone 3 and a decrease of 16.0 percentage points in Zone 5.
- 4.17 Tables 4.5 and 4.6 summarise the proportion of main food and 'top up' food shopping trips which are secured by retailers located within and outside of the St. Helens Borough, based upon the results of the household survey.
- 4.18 In terms of the main food shopping market share, the most popular store across the whole Study Area is the Asda at Kirkland Street in Zone 1, which secures 10.9% of all main food shopping trips, which is consistent with the store's performance in the 2011 survey. The zone within which the store secures the highest market share is Zone 6, with 35.9% of these residents undertaking main food shopping trips to the store.
- 4.19 The second most popular store in the Study Area is the Morrisons at Baxter Lane (also located in Zone 1), which attracts 6.3% of all main food shopping trips. The Morrisons store's performance is strongest in Zone 1, with 13.5% of these residents' main food shopping trips directed to the store.



- 4.20 Comparing the total Study Area main food market shares identified at 2016 with the position in 2011, the total main food market share secured by the Asda at Kirkland Street has remained consistent at 10.9%. However, the main food market share secured by the Morrisons at Baxter Lane and the Morrisons at Boundary Road has reduced in both cases by 3.7 and 5.4 percentage points respectively. In contrast, the main food market share secured by the Aldi at Branch Way has increased significantly from 0.3% to 4.1%, and the Aldi on Linkway West (which was not operational in 2011) secures 3.7% of all Study Area main food shopping trips.
- 4.21 Across the overall Study Area, 6.7% of all main food trips are claimed by destinations within and at the edge of St. Helens town centre (with the Aldi and Lidl at the edge of the centre accounting for a Study Area market share of 5.3%). The Asda at Kirkland Street secures 10.9% of main food shopping trips and the Tesco Extra at Linkway secures 5.7% of such trips. As such, there is a relatively high level of main food shopping trips directed to stores in, at the edge of, or within the general vicinity of St. Helens town centre.
- 4.22 Looking elsewhere in the Borough, Earlestown town centre secures a Study Area main food market share of 2.8%, with the majority of such trips being made to the Tesco at Earle Street (which claims a market share of 2.5%). At 2011, the main food market share secured by facilities in Earlestown town centre was slightly higher at 3.2%, with the reduction at 2016 attributable to the closure of the Netto at Haydock Street. The top-up convenience market share secured by facilities in Earlestown town centre has also reduced from 2011 to 2016, from 6.4% of all such trips throughout the Study Area to 3.8%. This reduction is primarily attributable to an overall reduction in top-up shopping trips to the Tesco on Earle Street in Earlestown town centre, with its market share declining from 4.2% in 2011 to 2.9% in 2016.
- 4.23 A total of 46.5% of main food shopping trips within the Study Area are being directed towards stores outside of the Borough, with much of these trips being claimed by facilities in Warrington, Wigan and Prescot.



Table 4.5: Principal Main Food Shopping Destinations Trip Analysis by Zone (%)

Zone	Address	1	2	3	4	5	6	2016 Total	2011 Total
1	Asda, Kirkland Street, St. Helens	20.0%	9.9%	0.0%	0.2%	2.5%	35.9%	10.9%	10.9%
1	Morrisons, Baxter Lane, St. Helens	13.5%	6.8%	1.6%	3.9%	3.6%	2.3%	6.3%	10.0%
1	Tesco Extra, Linkway, St. Helens	11.3%	6.9%	1.0%	0.8%	2.1%	9.2%	5.7%	-
1	Morrisons, Boundary Road, St. Helens	15.6%	1.2%	1.3%	0.0%	7.3%	8.3%	5.6%	11.0%
4	Morrisons, Westbrook Centre, Warrington	0.0%	0.0%	4.8%	23.3%	1.4%	0.0%	5.5%	-
5	Tesco Extra, Cables RP, Prescot	0.3%	1.0%	0.0%	0.0%	28.3%	1.7%	4.5%	7.5%
2	Aldi, Branch Way, Haydock	1.8%	9.6%	11.1%	0.2%	1.8%	1.5%	4.1%	0.3%
1	Aldi, Linkway West, St. Helens	8.0%	2.6%	0.0%	0.2%	4.6%	6.3%	3.7%	-
2	Tesco, Bellerophon Way, Haydock	1.8%	9.1%	3.5%	0.1%	0.0%	0.4%	3.2%	4.4%

Note: 'OSA' relates to facilities outside of the Study Area

- 4.24 Table 4.6 below identifies those stores which claim the greatest proportion of Study Area top-up food shopping trips. The table indicates that the Asda at Kirkland Street and the local shops in St. Helens town centre (both in Zone 1) each secure 4.7% of top-up shopping trips from across the six zones. The highest percentage of market share is secured from residents in Zone 1 in both instances, which is expected due to the more local nature of top-up shopping habits. Shoppers typically undertake their top-up shopping trips either in close proximity to their homes (i.e. small convenience stores like a Co-op store or Tesco Express or local newsagents) or in close proximity to their places of work. Morrisons on Boundary Road also attracts a high percentage of top-up shopping trips from Zone 1 residents, with the store attracting 9.8% of top-up food shopping trips which originate in the zone.
- 4.25 Looking at the change in market share since the 2011 household survey, there has been a decrease in top-up market share secured by the local shops within St. Helens town centre from 6.4% to 4.7%. Similar to the position for main food shopping trips, the overall top-up food Study Area market share secured by the Aldi at Branch Way has increased from 0.3% in 2011 to 2.4% in 2016.
- 4.26 Overall, the market share of top-up food shopping trips secured by stores in or at the edge of St. Helens town centre is higher than that secured for main food shopping. The St. Helens town centre market share is 9.1% (including the Aldi and Lidl), and a further 4.7% of top-up food shopping trips is secured by the Asda at Kirkland Street and 2.5% of trips by the Tesco Extra at Linkway.



Table 4.6: Principal Top Up Food Shopping Destinations Trip Analysis by Zone (%)

Zone	Address	1	2	3	4	5	6	Total 2016	Total 2011
1	Asda, Kirkland Street, St. Helens	10.1%	3.8%	0.0%	0.0%	1.1%	10.0%	4.7%	4.3%
1	Local Shops, St. Helens Town Centre	11.2%	5.2%	1.1%	0.0%	0.0%	4.0%	4.7%	6.4%
1	Morrisons, Boundary Road, St. Helens	9.8%	0.8%	0.0%	0.0%	2.3%	6.3%	3.6%	3.8%
OSA	Co-op, Warrington Road, Pesneth, Warrington	0.0%	3.9%	5.7%	7.5%	4.1%	1.5%	3.4%	-
2	Tesco Express, Vicarage Road, Haydock	0.4%	9.5%	0.0%	0.0%	2.5%	0.0%	3.1%	-
3	Tesco, Earle Street, Newton-le-Willows	0.0%	1.1%	38.3%	1.0%	0.0%	0.0%	3.0%	4.2%
1	Tesco Extra, Linkway, St. Helens	7.2%	0.5%	0.0%	0.7%	0.5%	4.0%	2.5%	-
4	Asda, Westbrook Centre, Warrington	0.0%	0.0%	2.8%	12.7%	0.0%	0.0%	2.4%	3.2%
2	Aldi, Branch Way, Haydock	1.3%	5.2%	7.0%	0.5%	0.0%	0.5%	2.4%	0.3%
1	M&S Foodhall, Church Street, St. Helens	2.0%	1.6%	1.1%	0.7%	0.0%	12.2%	2.3%	2.0%

Note: 'OSA' relates to facilities outside of the Study Area

Conclusions in Respect of Convenience Goods Shopping Patterns

4.27 Overall, convenience shopping patterns appear to have altered to the benefit of the larger foodstores across the Borough. The data also demonstrates that, on the whole, discount retailers such as Aldi and Lidl are also securing higher proportions of market share, particularly in terms of the main food trips. As a consequence, the Borough as a whole secures a greater proportion of main food and top-up food shopping trips at 2016 than it did at 2011. The proportion of main and top-up market share being retained by convenience retailers within St. Helens Borough has increased from residents in Zones 1, 2, 4 and 6. The Asda at Kirkland Street is the most popular destination for both main food and top-up food shopping across the Borough and the wider Study Area.

Comparison Goods Shopping Patterns: Clothing and Footwear

4.28 Table 4.7 below provides the clothing and footwear market share secured by destinations located within St. Helens Borough. The table compares the 2011 market share findings with those identified by the 2016 household survey.

4.29 Table 4.7 demonstrates that the market share within Zones 1, 3, 5 and 6 secured by destinations within St. Helens Borough has decreased by 15.6, 19.0, 7.6 and 18.7 percentage points respectively. Looking specifically at Zone 1, which covers St. Helens town centre, the decline is principally attributable to the decrease in market share of St. Helens town centre (for which the clothing and



footwear market share declined from 52.6% in 2011 to 38.3% in 2016; a decrease of 14.3 percentage points). In terms of clothing and footwear shopping trips which originate in Zone 3 – which covers Earlestown and Newton-le-Willows – there has been a 19.0 percentage point decrease in the market share secured by facilities in St. Helens Borough. Again, this decline in zonal market share is primarily attributable to the decline in shopping trips to facilities in St. Helens town centre, with the centre’s Zone 1 market share reducing from 28.6% in 2011 to 14.4% in 2016.

Table 4.7: St. Helens Borough Clothing and Footwear Market Share by Zone (2011 and 2016)

	Clothing and Footwear 2011	Clothing and Footwear 2016	Change 2011-2016
Zone 1	63.2%	47.6%	-15.6%
Zone 2	31.4%	44.6%	13.2%
Zone 3	41.3%	22.3%	-19.0%
Zone 4	3.4%	6.1%	2.7%
Zone 5	27.1%	19.5%	-7.6%
Zone 6	47.4%	28.7%	-18.7%
Total	34.1%	30.0%	-4.1%

- 4.30 Table 4.8 below provides a breakdown of market share by zone for the principal destinations for clothing and footwear shopping, both within and outside the Study Area.
- 4.31 St. Helens town centre secures the highest clothing and footwear market share, with 22.7% of such trips which originate within the Study Area being directed towards the town centre. The town centre secures more than one third of such shopping trips which originate in Zones 1 and 2 (the exact St. Helens town centre market share being 38.3% in the former and 33.8% in the latter). Ravenhead Retail Park secures 4.2% of the overall Study Area market share for clothing and footwear, with this retail venue being most popular in Zone 6 (where it secures a market share of 8.6%). St. Helens Retail Park secures a clothing and footwear Study Area market share of 2.1%, with this venue being most popular in Zone 1 and 3 (it secures a market share of 3.7% in the former zone and a market share of 3.5% in the latter).
- 4.32 Overall, the clothing and footwear market share secured by facilities in St. Helens town centre has decreased from 28.3% in 2011 to 22.7% in 2016, but the market share secured by Ravenhead and St. Helens Retail Parks has increased slightly in both cases (by 0.8 percentage points and 0.7 percentage points respectively). The market share secured by Warrington town centre has remained broadly consistent at 20.7% (it previously being 20.8% in 2011), but the proportion of Study Area clothing



and footwear shopping trips directed to Liverpool city centre has increased significantly from 8.6% of all such trips in 2011 to 13.1% in 2016.

Table 4.8: Principal Comparison Goods Shopping Destinations within St. Helens Borough Trip Analysis by Zone – Clothing and Footwear (%)

Zone	Address	1	2	3	4	5	6	Total 2016	Total 2011
1	St. Helens town centre	38.3%	33.8%	14.4%	3.5%	15.2%	20.1%	22.7%	28.3%
1	Ravenhead Retail Park, St. Helens	5.2%	6.0%	3.2%	0.5%	2.5%	8.6%	4.2%	3.4%
1	St. Helens Retail Park, St. Helens	3.7%	2.1%	3.5%	1.4%	1.4%	0.0%	2.1%	1.4%
OSA	Warrington town centre	5.0%	6.5%	46.0%	58.7%	5.0%	12.4%	20.7%	20.8%
OSA	Liverpool Town centre	22.0%	7.9%	3.7%	1.5%	21.6%	25.8%	13.1%	8.6%

Note: 'OSA' relates to facilities outside of the Study Area

Comparison Goods Shopping Patterns: Books, CDs and DVDs

- 4.33 Table 4.9 below identifies the market share of trips made to purchase books, CDs and DVDs claimed by destinations within St. Helens Borough. The table compares the 2011 market share findings with those identified by the 2016 household survey.
- 4.34 Overall, destinations within St. Helens Borough secure 34.0% of trips to purchase books, CDs and DVDs which originate across the Study Area. This represents a decrease of 4.6 percentage points on the market share of 38.6% which was recorded in 2011. Facilities in St. Helens secure 76.8% of the market share within Zone 1, which represents a limited decreased of 1.7 percentage points compared to the figure recorded in 2011. Within Zone 1, St. Helens town centre attracts a market share of 65.0% and the Tesco Extra at Linkway secures 5.2% of such shopping trips. Within Zone 3, 35.1% of trips to purchase Books, CDs and DVDs are secured by facilities in St. Helens town centre, and 7.3% of such trips are secured by Earlestown town centre.
- 4.35 The market share of shopping trips to purchase books, CDs and DVDs secured by destinations in St. Helens Borough has decreased within each of the six zones, with the greatest decline evident in Zone 6. The market share in this zone declined from 50.9% in 2011 to 34.5% in 2016.



Table 4.9: St. Helens Borough Books, CDs and DVDs Market Share by Zone (2011 and 2016)

	Books, CDs and DVDs 2011	Books, CDs and DVDs 2016	Change 2011-2016
Zone 1	78.5%	76.8%	-1.7%
Zone 2	36.0%	31.0%	-5.0%
Zone 3	38.7%	35.1%	-3.6%
Zone 4	3.4%	1.0%	-2.4%
Zone 5	30.6%	18.6%	-12.0%
Zone 6	50.9%	34.5%	-16.4%
Total	38.6%	34.0%	-4.6%

4.36 Table 4.10 below provides a breakdown of market share by zone for the principal destinations for books, CDs and DVDs shopping, both within and outside the Study Area. St. Helens town centre achieves the highest market share, securing 24.5% of all such shopping trips which originate within the Study Area.

4.37 Across the Study Area as a whole, St. Helens town centre’s market share of shopping trips to purchase books, CDs and DVDs has decreased from 34.9% in 2011 to 24.5% in 2016. The market share secured by Warrington town centre has also decreased from 27.1% in 2011 to 24.4% in 2016, but the proportion of such shopping trips attracted to Liverpool city centre has increased from 6.0% in 2011 to 14.9% in 2016.

Table 4.10: Principal Comparison Goods Shopping Destinations within St. Helens Borough Trip Analysis by Zone – Books, CDs and DVDs (%)

Zone	Address	1	2	3	4	5	6	Total 2016	Total 2011
1	St. Helens town centre	65.0%	18.9%	15.4%	0.0%	11.3%	19.3%	24.5%	34.9%
1	Tesco Extra, Linkway, St. Helens	5.2%	0.0%	6.3%	1.0%	0.0%	3.2%	2.2%	-
2	Tesco, Bellerophon Way, Haydock	0.0%	5.3%	2.4%	0.0%	0.0%	0.0%	1.5%	-
OSA	Warrington town centre	0.0%	14.9%	46.9%	74.9%	5.3%	2.1%	24.4%	27.1%
OSA	Liverpool Town centre	17.0%	19.7%	0.0%	2.7%	16.6%	31.3%	14.9%	6.0%

Note: 'OSA' relates to facilities outside of the Study Area



Comparison Goods Shopping Patterns: Small Household Goods

- 4.38 Table 4.11 sets out the market share of trips made to purchase small household goods secured by destinations within St. Helens Borough. The highest market share for St. Helens is secured in Zone 1, where 69.2% of shopping trips are directed to facilities in the Borough (this represents a modest increase on the market share of 68.1% recorded in 2011). Within Zone 1 there has been a decrease in market share secured by facilities within St. Helens town centre from 56.3% to 45.5%, but an increase in the proportion of small household goods shopping trips secured by Ravenhead Retail Park (from 7.4% in 2011 to 13.5% in 2016) and St. Helens Retail Park (4.4% to 8.9%).
- 4.39 The greatest increase in the Borough’s market share of trips to purchase small household goods is apparent in Zone 2, where the market share has increased by 17.0 percentage points to 60.8% in the five years to 2016. The substantial increase in Zone 2 is also due to an increase in trips to St. Helens town centre (from 25.8% in 2011 to 36.7% in 2016) and also to St. Helens Retail Park (from 5.5% to 14.5%). This increase is likely to be due to the opening of Home Bargains on the Retail Park in the intervening period between the undertaking of the two surveys.

Table 4.11: St. Helens Borough Small Household Goods Market Share by Zone (2011 and 2016)

	Small Household Goods 2011	Small Household Goods 2016	Change 2011-2016
Zone 1	68.1%	69.2%	1.1%
Zone 2	43.8%	60.8%	17.0%
Zone 3	53.3%	51.0%	-2.3%
Zone 4	6.5%	3.9%	-2.6%
Zone 5	26.9%	29.8%	2.9%
Zone 6	51.5%	45.3%	-6.2%
Total	38.5%	43.3%	4.8%

- 4.40 The below Table 4.12 identifies the principal destinations for small household goods shopping trips and again sets out market shares on a zonal basis. Once more, St. Helens town centre is the dominant destination for small household goods across the overall Study Area, securing a 22.9% market share overall (albeit this has reduced from the 27.3% market share recorded in 2011). The highest market share for St. Helens town centre is secured in Zones 1 and 2, which achieve respective market shares of 45.5% and 36.6%.
- 4.41 When comparing the market shares with those achieved in 2011, it is evident that St. Helens town centre has been the subject of a reduction in market share in five zones (the exception being Zone 1). Most notably, the market share of small household goods shopping trips from Zone 3 to St. Helens



town centre has been the subject of a significant reduction, falling from 22.2% in 2011 to 3.8% in 2016 (a decrease of 18.4 percentage points). Conversely, there has been an increase in small household goods trips secured by Ravenhead Retail Park from Zone 3 residents, with the market share increasing from 2.2% of all such trips in 2011 to 19.7% in 2016. However, the market share of small household goods shopping trips which originate in Zone 3 and are directed to Earlestown town centre has remained broadly consistent, with its market share of 17.8% in 2011 reducing very slightly to 17.2% in 2016.

Table 4.12: Principal Comparison Goods Shopping Destinations within St. Helens Borough Trip Analysis by Zone – Small Household Goods (%)

Zone	Address	1	2	3	4	5	6	Total 2016	Total 2011
1	St. Helens town centre	45.5%	36.6%	3.8%	2.8%	8.0%	18.6%	22.9%	27.3%
1	St. Helens Retail Park, St. Helens	8.9%	14.5%	6.6%	1.1%	15.3%	18.1%	10.7%	3.2%
4	Gemini Retail Park, Europa Boulevard, Warrington	9.1%	5.7%	10.6%	20.3%	2.2%	1.7%	8.7%	8.8%
4	IKEA, Europa Boulevard, Warrington	8.4%	4.2%	3.9%	12.9%	7.2%	4.0%	7.4%	
OSA	Warrington town centre	2.1%	3.0%	21.7%	44.0%	2.9%	6.0%	12.7%	23.5%

Note: 'OSA' relates to facilities outside of the Study Area

Comparison Goods Shopping Patterns: Toys, Games, Bicycles and Recreation Goods

4.42 Table 4.13 sets out the market share of trips made to purchase toys, games, bicycles and other recreation goods secured by destinations within St. Helens Borough. The table identifies that, across the Study Area as a whole, the Borough has increased its market share for such trips from 37.3% in 2011 to 53.3% in 2016 (an increase of 16.0 percentage points). There has been an increase within five of the six zones (the exception being Zone 3, which experienced a decline in market share of 9.2 percentage points in the five years to 2016). The decrease in the Borough's market share of Zone 3 shopping trips to purchase recreation goods is attributable to a decrease in the popularity of St. Helens town centre in this zone (its market share decreased from 14.7% in 2011 to 11.6% in 2016) and a decrease in the popularity of Earlestown town centre (from 5.9% in 2011 to 1.4% in 2016). Instead, a higher proportion of Zone 3 residents are travelling to Gemini Retail Park to undertake recreation shopping, with this venue increasing its market share in the zone from 8.9% in 2011 to 17.6% in 2016.



4.43 St. Helens Borough has benefitted from the largest increase in market share in Zones 1 and 2 (which have benefitted from respective 11.4 and 25.6 percentage point increases in market share). The increased market share in these zones is partly attributable to an increase in the popularity of Ravenhead Retail Park (which has benefitted a 1.4 percentage point increase in market share in Zone 1 and a 17.0 percentage point increase in Zone 2 in the five years to 2016). The increase in popularity of Ravenhead Retail Park within Zone 2, in particular, is at the expense of Warrington, Leigh and Wigan town centres, all of which have experienced a decrease in trips from residents of this zone.

Table 4.13: St. Helens Borough Toys and Recreation Goods Market Shares by Zone (2011 and 2016)

	Toys and Recreation Goods 2011	Toys and Recreation Goods 2016	Change 2011-2016
Zone 1	71.7%	83.1%	11.4%
Zone 2	36.3%	61.9%	25.6%
Zone 3	32.4%	23.2%	-9.2%
Zone 4	4.0%	9.0%	5.0%
Zone 5	34.7%	39.3%	4.6%
Zone 6	54.3%	60.7%	6.4%
Total	37.3%	53.3%	16.0%

4.44 Table 4.14 below demonstrates that St. Helens town centre is the principal destination for recreation goods shopping within the Study Area at 2016, securing an overall market share of 21.7% of such trips. However, this represents a limited decline in the centre’s performance since 2011, when it secured 23.8% of such trips originating within the Study Area (a reduction of 2.1 percentage points). The total market share for recreation goods shopping trips secured by both Ravenhead and St. Helens Retail Parks has increased considerably. The Study Area market share of the former retail park increased from 9.7% in 2011 to 18.8% in 2016 (an increase of 9.1 percentage points) and the market share of the latter increased from 3.2% in 2011 to 11.2% in 2016 (an increase of 8.0 percentage points).



Table 4.14: Principal Comparison Goods Shopping Destinations within St. Helens Borough Trip Analysis by Zone – Toys and Recreation Goods (%)

Zone	Address	1	2	3	4	5	6	Total 2016	Total 2011
1	St. Helens town centre	45.8%	23.1%	11.6%	4.2%	6.6%	21.1%	21.7%	23.8%
1	Ravenhead Retail Park, St. Helens	21.8%	26.8%	3.1%	2.1%	24.6%	23.7%	18.8%	9.7%
1	St. Helens Retail Park, St. Helens	12.7%	11.1%	4.4%	2.7%	8.1%	32.0%	11.2%	3.2%
4	Gemini Retail Park, Warrington	7.2%	4.4%	21.7%	11.2%	2.6%	6.0%	7.4%	11.7%
OSA	Warrington town centre	0.6%	9.2%	19.0%	52.6%	4.4%	1.5%	15.1%	26.0%
OSA	Liverpool Town centre	3.9%	6.5%	0.0%	0.9%	1.4%	3.8%	3.6%	3.8%

Note: 'OSA' relates to facilities outside of the Study Area

Comparison Goods Shopping Patterns: Chemist Goods

4.45 Table 4.15 sets out the market share of trips made to purchase chemist and beauty goods secured by destinations within St. Helens Borough. The table identifies that facilities in St. Helens Borough secure a market share of 54.2% of shopping trips to purchase chemist goods which originate within the Study Area (this represents an increase of 3.5 percentage points on the market share recorded in 2011). Zones 2 and 6 have experienced the greatest increase in popularity, with the market share of these zones respectively increasing by 13.7 and 12.4 percentage points in the five year period to 2016. The highest St. Helens Borough market share for chemist goods is secured in Zone 1. However, its market share of 90.8% in 2016 actually represents a modest decline in its performance since 2011 (its market share was then 3.5 percentage points higher at 94.3%). The chemist goods market share for the Borough secured within Zones 2, 3 and 6 ranges between 67.4% (in Zone 2) to 84.1% (in Zone 6). The high market share secured within these zones is reflective of the fact that such goods are often purchased closer to home.

Table 4.15: St. Helens Borough Chemist Goods Market Shares by Zone (2011 and 2016)

	Chemist Goods 2011	Chemist Goods 2016	Change 2011-2016
Zone 1	94.3%	90.8%	-3.5%
Zone 2	53.7%	67.4%	13.7%
Zone 3	76.2%	80.2%	4.0%
Zone 4	3.4%	4.9%	1.5%
Zone 5	26.5%	22.7%	-3.8%
Zone 6	71.7%	84.1%	12.4%
Total	50.7%	54.2%	3.5%



4.46 Table 4.16 identifies the principal destinations for small household goods shopping trips and provides market shares on a zonal basis. St. Helens town centre secures the highest market share across the whole Study Area. However, its Study Area market share has decreased from 36.4% in 2011 to 27.9% in 2016 (a decrease of 8.5 percentage points). In Zone 1, more than two-thirds of residents (67.9%) indicate that they last shopped for chemist goods in St. Helens town centre and 8.5% last visited Ravenhead Retail Park to purchase such items. Earlestown town centre secures 3.1% of all shopping trips to purchase chemist goods, which represents a modest increase of 0.5 percentage points on the market share recorded in 2011.

Table 4.16: Principal Comparison Goods Shopping Destinations within St. Helens Borough Trip Analysis by Zone – Chemist Goods (%)

Zone	Address	1	2	3	4	5	6	Total 2016	Total 2011
1	St. Helens town centre	67.9%	32.0%	5.4%	1.6%	4.2%	42.0%	27.9%	36.4%
5	Prescot town centre	0.6%	0.0%	0.0%	0.0%	39.2%	0.0%	6.2%	5.7%
1	Ravenhead Retail Park, St. Helens	8.5%	8.4%	0.8%	0.9%	1.5%	5.2%	4.9%	3.2%
4	Gemini Retail Park, Warrington	3.6%	0.3%	10.7%	12.5%	1.0%	0.0%	4.3%	4.0%
3	Earlestown town centre	0.0%	0.9%	46.2%	0.6%	0.0%	0.0%	3.1%	2.6%
OSA	Warrington town centre	0.0%	2.3%	4.3%	47.5%	0.6%	0.0%	11.3%	20.2%

Note: 'OSA' relates to facilities outside of the Study Area

Comparison Goods Shopping Patterns: Electrical

4.47 The market share of electrical goods shopping trips secured by facilities within St. Helens Borough has increased across all six zones. Table 4.17 below demonstrates that the most significant increase has occurred in Zone 2, where the market share claimed by the Borough has increased from 53.4% in 2011 to 73.7% in 2016 (an increase of 20.3 percentage points). Whilst the market share of electrical goods shopping trips originating in Zone 2 claimed by St. Helens town centre decreased significantly from 44.0% in 2011 to 25.5% in 2016, the market share secured by out of centre facilities at Ravenhead and St. Helens Retail Parks has increased. Ravenhead Retail Park's market share has increased from 11.2% in 2011 to 23.7% in 2016, and St. Helens Retail Park's market share has increased from 5.6% to 14.9% over the same period.

4.48 The highest market share of electrical goods shopping trips to facilities in St. Helens Borough is secured in Zone 1, with its 2016 market share of 86.7% representing a 2.8 percentage point increase on 2011 figure. Of the 2016 market share, 45.4% is claimed by Ravenhead Retail Park and 22.9% by



St. Helens town centre. In 2011, the proportion of electrical goods shopping trips secured by St. Helens town centre was higher at 44.0%, but the proportion secured by Ravenhead Retail Park was lower at 30.4%.

Table 4.17: St. Helens Borough Electrical Goods Market Shares by Zone (2011 and 2016)

	Electrical Goods 2011	Electrical Goods 2016	Change 2011-2016
Zone 1	83.9%	86.7%	2.8%
Zone 2	53.4%	73.7%	20.3%
Zone 3	52.0%	55.5%	3.5%
Zone 4	7.0%	8.9%	1.9%
Zone 5	46.2%	51.2%	5.0%
Zone 6	68.1%	77.7%	9.6%
Total	49.7%	58.2%	8.5%

4.49 Table 4.18 below demonstrates that across the Study Area as a whole, the market share of electrical goods shopping trips secured by St. Helens town centre decreased from 25.0% in 2011 to 14.6% in 2016 (a decrease of 10.4 percentage points). This is commensurate with the improvement in Study Area market share secured by Ravenhead Retail Park, which increased its market share from 15.8% in 2011 to 24.9% in 2016 (an increase of 9.1 percentage points). This change in market share accords with shoppers' tendency to visit out of centre destinations for such goods and the overall reduction in such retailers within town centre environments. Shoppers prefer the 'ease' of access and larger range of goods retailers are able to display in out of centre retail warehouse formats.

Table 4.18: Principal Comparison Goods Shopping Destinations within St. Helens Borough Trip Analysis by Zone – Electrical Goods (%)

Zone	Address	1	2	3	4	5	6	Total 2016	Total 2011
1	Ravenhead Retail Park, St. Helens	45.4%	23.7%	20.2%	1.4%	17.5%	46.1%	24.9%	15.8%
1	St. Helens town centre	22.9%	25.5%	2.1%	1.4%	12.7%	9.9%	14.6%	25.0%
1	St. Helens Retail Park, St. Helens	13.4%	14.9%	15.7%	2.1%	16.9%	20.8%	12.8%	5.2%
4	Alban Retail Park, Warrington	0.4%	1.7%	12.9%	37.6%	0.0%	1.0%	9.8%	7.1%
OSA	Warrington town centre	0.4%	0.8%	24.7%	25.9%	2.7%	0.0%	7.9%	15.5%

Note: 'OSA' relates to facilities outside of the Study Area



Comparison Goods Shopping Patterns: DIY

4.50 The market share of shopping trips to purchase DIY goods secured by facilities within St. Helens Borough has increased since 2011 across all five of the six zones (the market share in Zone 1 decreased by just 0.7 percentage points between 2011 and 2016). Table 4.19 demonstrates that the highest market share for DIY goods shopping trips secured by St. Helens Borough facilities is within Zone 1 (the Borough secures a market share of 95.3% within this zone). In Zone 1, 55.0% of DIY shopping trips are secured by Ravenhead Retail Park, 23.1% by St. Helens Retail Park, and 15.0% by St. Helens town centre. The second highest St. Helens Borough market share is achieved in Zone 6, where 51.2% of DIY shopping trips are claimed by Ravenhead Retail Park, 30.8% by St. Helens Retail Park, and 5.8% by St. Helens town centre. The most significant increases in market share secured by St. Helens facilities occur in Zone 2 and Zone 5. Within Zone 5, the increase in market share is principally attributable to the performance of Ravenhead Retail Park, which secures 43.1% of such trips which originate within the zone (an increase of 16.1 percentage points on its 2011 Zone 5 market share of 27.0%).

Table 4.19: St. Helens Borough DIY Goods Market Shares by Zone (2011 and 2016)

	DIY Goods 2011	DIY Goods 2016	Change 2011-2016
Zone 1	96.0%	95.3%	-0.7%
Zone 2	55.7%	63.7%	8.0%
Zone 3	20.4%	26.0%	5.6%
Zone 4	0.5%	4.2%	3.7%
Zone 5	51.6%	62.8%	11.2%
Zone 6	83.8%	89.7%	5.9%
Total	51.5%	59.2%	7.7%

4.51 Table 4.20 indicates that Ravenhead Retail Park is the single most popular DIY goods shopping venue across the Study Area, with its 2016 market share of 32.6% equating to a 7.9 percentage point increase in market share since 2011. The second highest market share is secured by the B&Q at Delph Lane, which attracts 18.9% of trips originating within the Study Area to purchase DIY goods (this represents a significant increase on its 2011 market share of 4.1%). St. Helen’s Retail Park currently secures 7.4% of DIY goods shopping trips which originate within the Study Area, which is broadly comparable to its performance in 2011.



Table 4.20: Principal Comparison Goods Shopping Destinations within St. Helens Borough Trip Analysis by Zone – DIY (%)

Zone	Address	1	2	3	4	5	6	Total 2016	Total 2011
1	Ravenhead Retail Park, St. Helens	55.0%	30.8%	6.5%	0.7%	43.1%	51.2%	32.6%	24.7%
4	B&Q, Delph Lane, Winwick	0.0%	8.5%	59.2%	61.7%	1.4%	0.7%	18.9%	4.1%
1	St. Helens Retail Park, St. Helens	15.0%	8.8%	0.0%	2.2%	4.8%	5.8%	7.4%	6.6%
OSA	B&Q, Firth Street, Wigan	0.0%	11.8%	0.0%	0.0%	2.1%	3.8%	3.7%	-
OSA	Warrington town centre	0.3%	0.6%	3.8%	10.1%	0.0%	1.4%	2.7%	24.1%

Note: 'OSA' relates to facilities outside of the Study Area

Comparison Goods Shopping Patterns: Furniture

- 4.52 Finally, Table 4.21 sets out the market share of trips made to purchase furniture goods secured by destinations within St. Helens Borough. The greatest Borough market shares are secured in Zones 1 and 6, with over 84% of furniture shopping trips in both zones being directed to facilities in St. Helens.
- 4.53 Zones 2 and 6 benefit from the greatest increases in St. Helens Borough market share, with the increases respectively equating to 13.6 and 21.6 percentage points. Within Zone 6, this is primarily due to increases in market share secured by Ravenhead and St. Helens Retail Parks.

Table 4.21: St. Helens Borough Furniture Goods Market Shares by Zone (2011 and 2016)

	Furniture Goods 2011	Furniture Goods 2016	Change 2011-2016
Zone 1	77.7%	84.2%	6.5%
Zone 2	43.9%	57.5%	13.6%
Zone 3	62.2%	62.5%	0.3%
Zone 4	5.3%	1.6%	-3.7%
Zone 5	39.3%	37.5%	-1.8%
Zone 6	63.3%	84.9%	21.6%
Total	44.9%	50.9%	6.0%

- 4.54 Table 4.22 below again provides a breakdown of the market share attracted by the principal destinations both within and outside of the Borough. St. Helens town centre secures the highest market share for furniture goods across the Study Area as a whole. However, its market share of 18.3% in 2016 represents a decrease on the figure of 30.2% recorded in 2011. Both Ravenhead and St. Helens Retail Parks have increased their overall furniture goods market share across the Study Area.



Table 4.22: Principal Comparison Goods Shopping Destinations within St. Helens Borough Trip Analysis by Zone – Furniture (%)

Zone	Address	1	2	3	4	5	6	Total 2016	Total 2011
1	St. Helens town centre	34.7%	18.8%	4.3%	1.0%	10.8%	43.1%	18.3%	30.2%
1	Ravenhead Retail Park, St. Helens	27.1%	16.8%	6.2%	0.0%	7.6%	12.5%	12.8%	5.5%
1	St. Helens Retail Park, St. Helens	9.8%	7.1%	1.2%	0.0%	12.2%	13.8%	7.1%	3.4%
OSA	Warrington town centre	3.0%	5.6%	17.0%	34.1%	3.4%	0.0%	11.2%	21.4%

Note: 'OSA' relates to facilities outside of the Study Area

Conclusions in Respect of Comparison Goods Shopping Patterns

- 4.55 It is useful to summarise the Borough's market share for both convenience and comparison goods across the whole Study Area to understand how shopping patterns have changed over the last five years. Table 4.23 below identifies the market share for each goods sector secured by facilities within St. Helens Borough for all six zones. For main food and top-up food shopping, the Borough's market share has increased by 5.0 and 3.4 percentage points respectively.
- 4.56 The performance of comparison goods facilities in St. Helens Borough has improved for small household goods, toys and recreation goods, chemist goods, electrical goods and DIY goods, but has declined for clothing and footwear, furniture goods, and books, CDs and DVDs. The most significant change in market share has occurred in the toys and recreation goods category, with the Borough benefitting from a 16.0 percentage point increase across the Study Area.

Table 4.23: Overall St. Helens Borough Market Share (2011 and 2016)

Category	2011 (%)	2016 (%)	Change 2011-2016 (%)
Convenience			
Main Food	49.5%	54.5%	5.0%
Top-up Food	55.3%	58.7%	3.4%
Comparison			
Clothing and footwear	34.1%	30.0%	-4.1%
Books, CDs and DVDs	38.6%	34.0%	-4.6%
Small household goods	38.5%	43.3%	4.8%
Toys and recreation goods	37.3%	53.3%	16.0%
Chemist Goods	50.7%	54.2%	3.5%
Electrical goods	49.7%	58.2%	8.5%
DIY goods	51.5%	59.2%	7.7%
Furniture goods	51.5%	50.9%	-0.6%



- 4.57 Table 4.24 below provides a breakdown of the market share secured by retail facilities within St. Helens town centre for the various goods sectors. Comparison of the 2011 and 2016 datasets indicate that St. Helens town centre has suffered a decline in the market share of trips secured for each goods sector. The decline in performance ranges from a reduction of 2.1 percentage points for toys and recreation goods shopping trips to a reduction of 11.9 percentage points for furniture goods shopping trips.
- 4.58 As we have identified above, the most significant impacts arising at the centre have occurred as a result of increases in market share for most goods at the out-of-centre retail parks, in particular Ravenhead and St. Helens Retail Parks. The town centre convenience market share has been impacted on due to the relocation of the Tesco from Chalon Way to Linkway (its Chalon Way store was previously included within the 2011 estimation of the town centre’s convenience goods market share), and as a consequence of the increased popularity of the other edge and out of centre foodstores, in particular the Asda at Kirkland Street and the new Aldi foodstores at Linkway and Clock Face Road.

Table 4.24: St. Helens Town Centre Market Share (2011 and 2016)

Category	2011 (%)	2016 (%)	Change 2011-2016 (%)
Convenience			
Main Food	5.7%	1.5%	-4.2%
Top-up Food	11.9%	4.7%	-7.2%
Comparison			
Clothing and footwear	28.3%	22.7%	-5.6%
Books, CDs and DVDs	34.9%	24.5%	-10.4%
Small household goods	27.3%	22.9%	-4.4%
Toys and recreation goods	23.8%	21.7%	-2.1%
Chemist Goods	36.4%	27.9%	-8.5%
Electrical goods	25.0%	14.6%	-10.4%
DIY goods	18.9%	7.4%	-11.5%
Furniture goods	30.2%	18.3%	-11.9%

Note: Main and top-up convenience figures at 2011 include the Tesco at Chalon Way

Customer Behaviour

- 4.59 The results of the household survey are useful in understanding customer behaviour in terms of how people undertake their convenience and comparison goods shopping.



- 4.60 When respondents to the household survey were asked to provide the principal reason they choose to undertake their main food shopping at a particular store, the most popular response (provided by 37.8% of respondents) was that their chosen store was near to home. The next popular answer was that the store offered lower prices (identified by 15.0% of respondents). A further 6.8% of respondents did not give a reason, 6.4% stated that it was due to the quality of food available, and 6.0% stated it was due to the choice of food goods available. The majority of household survey respondents (62.5%) do their main food shopping at least once a week, with 15.9% undertaking main food shopping at least twice a week, and 9.6% doing such shopping at least once a fortnight. The most popular time to undertake main food shopping is on weekdays during the day (46.3%). Only 16.2% of respondents undertake their main food shopping on a Saturday and 10.8% undertake their shop on weekdays during the evening.
- 4.61 In terms of linked trips, the household survey results have been analysed in order to identify those respondents who link main food shopping trips to town centre stores with other activities. We have specifically identified those linked trips that derived from main food shopping trips to four foodstores in St. Helens and one in Earlestown. The results are set out in Table 4.25 below. The greatest propensity to link a main food shopping trip with other activities is evident at the Tesco at Earle Street in Earlestown, where 33% of the shoppers stated they link their trip with another activity. By way of contrast, 27% of respondents who undertake their main food shopping at the Asda at Kirkland Street and the Tesco at Linkway indicated that their shop forms part of a linked trip. For each of the below five main food shopping destinations, at least four out of every five linked trips are directed to the most proximate town centre (St. Helens or Earlestown).



Table 4.25: Proportion of Town Centre Main Food Shopping Trips Linked with Other Activities

Response	Aldi, Linkway, St. Helens	Lidl, King Street, St. Helens	Asda, Kirkland Street, St. Helens	Tesco Extra, Linkway, St. Helens	Tesco, Earle Street, Earlestown
Yes – non-food shopping	12%	6%	6%	13%	15%
Yes – other-food shopping	1%	8%	2%	3%	10%
Yes – visiting services such as banks and other financial institutions	0%	3%	1%	1%	1%
Yes – leisure activity	6%	0%	2%	0%	0%
Yes – travelling to / from work	0%	0%	8%	4%	0%
Yes – travelling to / from school / college / university	0%	0%	4%	0%	0%
Yes – getting petrol	0%	0%	1%	3%	2%
Yes – visiting café / pub / restaurant	1%	0%	1%	1%	0%
Yes – visiting family / friends	0%	0%	2%	1%	3%
Yes – visiting health service such as doctor, dentist, hospital	0%	0%	0%	0%	0%
Yes – visiting other service such as laundrette, hairdresser, recycling	0%	0%	0%	0%	1%
Yes – other activity	0%	0%	0%	0%	0%
Total	21%	17%	27%	27%	33%

Source: NEMS Household Survey, Question 11

- 4.62 Respondents to the household survey were also asked if they ever visit St. Helens or Earlestown town centres; 55.8% of all respondents stated that they visit St. Helens town centre on occasion and 18.1% visit Earlestown town centre.
- 4.63 Of those visiting St. Helens, 24.9% visit the centre at least once a week and 18.8% visit at least once a month. In terms of how the respondents travel to the centre, 57.5% travel by car and 21.4% travel by bus. The principal reason respondents visit the centre is because of the choice and range of shops (18.3%), followed then by the fact that it is close to home (17.6%) and because of the choice of services (14.1%). Respondents who visit St. Helens were asked whether there were any measures which could be implemented to encourage them to visit more often, with 47.1% identifying that an increased choice and range of shops would help. More than one third (34.6%) stated that there were no measures that would encourage them to visit St. Helens town centre more often.



- 4.64 Just 18.1% of those that visit St. Helens town centre indicate that they visit in the evening. Of these, 33.6% identified that the main reason for their evening visits is to go to restaurants and 30.2% indicated that frequenting bars and drinking establishments was the principal purpose of their visits. Of these evening visitors, 66.3% stated that the town centre could improve as an evening destination and 46.3% identified that a wider range of restaurants would help.
- 4.65 Turning to Earlestown, of those respondents that do visit the centre, 25.4% indicated that they visit at least once a week and 64.7% stated that they travel to Earlestown via car. More than one third (37.0%) of Earlestown visitors indicated that they visit primarily because of the market and 13.7% stated it was because of the choice and range of shops. When asked if there were any measures that would encourage the respondents to visit Earlestown more, 19.1% of respondents mentioned the choice and range of shops, but the majority (58.6%) indicated that there were no measures which would result in them visiting more often.
- 4.66 Respondents were asked whether they undertake shopping via electronic means i.e. home, mobile or TV shopping. The majority of respondents (56.6%) stated that they shop via home internet, 23.5% shop via portable internet devices (mobile phone, tablets etc) and 3.2% shop via the TV. When asked which goods their household purchases via electronic shopping, the highest positive response was for clothes (56.1%), followed by CDs, DVDs and music (37.4%), and then books (35.6%).

In Street Surveys

- 4.67 In street surveys were undertaken by NEMS Market Research in St. Helens and Earlestown town centres in June 2016. The purpose of the surveys is to provide an insight into the views and behaviours of customers, residents and visitors in relation to their visits to the two town centres.
- 4.68 The surveys were undertaken at various locations across both centres, to ensure that a range of respondents were questioned. In total, 102 surveys were undertaken in St. Helens town centre and 51 in Earlestown town centre. A copy of the in street survey results are included at Appendix 3.

Reason for visiting the centres

- 4.69 Respondents were asked why they chose to visit St. Helens and Earlestown. For both centres, the most popular reason for visiting was due to the centre's proximity to the respondent's home (44.1% of respondents in St. Helens town centre and 72.6% of respondents in Earlestown town centre provided this response). The next most popular responses were different for each centre, with 17.7% in St. Helens town centre citing that the provision of services was the main reason for their visit, followed by



13.7% identifying the choice of high street retailers. However, the second most popular reason for visiting Earlestown town centre was the market (17.7%) followed by the fact that the centre is close to friends and/or family (11.8%).

Table 4.26: Main Reason for Choosing to Shop/Visit the Town centre

	1st		2nd		3rd		4th	
St. Helens	Close to home	44.1%	Provision of services	17.7%	Choice of high street retailers	13.7%	Accessibility by public transport <i>and</i> Range of independent shops	12.8%
Earlestown	Close to home	72.6%	The market	17.7%	Close to friends/family	11.8%	Habit	7.8%

Source: NEMS In Street Survey, Question 9

4.70 In addition, respondents were also asked the principal purpose of their visit to St. Helens and Earlestown on the day of survey. Within St. Helens town centre, 14.7% of respondents stated that the main reason for visiting the centre on the day of the survey was to visit banks, building societies or the Post Office, and the exact same proportion of visitors identified that the main reason for their visit was to browse. In Earlestown, the main reason for visiting the centre was to visit the Tesco foodstore at Earle Street.

Table 4.27: Main Purpose of Visit to the Town centre on the Day of the Survey

	1st		2nd		3rd		4th	
St. Helens	Banks <i>and</i> Browsing	14.7%	-	-	Marks and Spencer	9.8%	Clothes/shoes shopping	8.8%
Earlestown	Tesco, Earle Street	31.4%	Browsing <i>and</i> Specialist Shops <i>and</i> Wilko, Back Market Street	9.8%	-	-	-	-

Source: NEMS In Street Survey, Question 10

Mode of Travel to Centre

4.71 Respondents in both St. Helens and Earlestown town centres were asked how they travelled to the centre on the day of the survey. In St. Helens town centre, 42.2% of respondents stated that they travelled by bus on the day of the survey and 23.5% walked to the centre. In Earlestown town centre, 54.9% of respondents travelled to the centre on foot and 25.5% drove to the centre (with a



further 7.8% being a passenger in a car). The greater propensity of respondents in Earlestown town centre to travel on foot is reflective of the number of residents in close proximity to the centre and the relatively localised catchment of the centre.

Table 4.28: Mode of Travel to Town centre

	1st		2nd		3rd		4th	
St. Helens	Bus	42.2%	Walk	23.5%	Car (driver)	20.6%	Car (passenger)	8.8%
Earlestown	Walk	54.9%	Car (driver)	25.5%	Car (passenger) and Bus	7.8%	-	-

Source: NEMS In Street Survey, Question 3

Food Shopping

4.72 Respondents to the in street survey were also questioned in respect of how often they visited the relevant centre to undertake their main food shop. In St. Helens, a majority of respondents (52.0%) indicated that they never undertook main food shopping in the town centre, with the next most popular response being once a week (19.6%). In terms of Earlestown, the most popular response was once a week (identified by 31.4% of respondents), followed by two to three times a week (25.5%).

Table 4.29: Frequency of Visit to Town Centre to Undertake Main Food Shopping

Centre	Every day	2-3 times a week	Once a week	Once a fortnight	Once a month	Less than once a month	Never
St. Helens	2.0%	13.7%	19.6%	5.9%	2.9%	1.0%	52.0%
Earlestown	2.0%	25.5%	31.4%	5.9%	2.0%	5.9%	23.5%

Source: NEMS In Street Survey, Question 14

4.73 The high proportion of respondents stating that they do not visit St. Helens to undertake their main food shop demonstrates the lack of large format food retail facilities within the centre itself. However, there are a number of large format convenience facilities on the edge of the centre which the household survey has identified are capable of supporting linked trips to the centre.

Non-Food Shopping

4.74 Turning to non-food shopping and the frequency of respondents' visits, 24.5% of respondents within St. Helens town centre identified that they visit once a week and 19.6% of respondents indicated that they visit once a month or less than once a month. No respondents visited on a daily basis.



4.75 In Earlestown town centre, 31.4% of respondents stated that they visit once a month and 19.6% stated that they visit less than once a month. Slightly more than half of respondents in Earlestown town centre indicated that they visit once a month or less. The results indicate that users of St. Helens town centre appear to visit more frequently, which may be a consequence of the greater offer apparent in the centre.

Table 4.30: Frequency of Visit to Town centre for Non-Food Shopping

Town	Every day	2-3 times a week	Once a week	Once a fortnight	Once a month	Less than once a month
St. Helens	0.0%	16.7%	24.5%	14.7%	19.6%	19.6%
Earlestown	5.9%	7.8%	17.7%	13.7%	31.4%	19.6%

Source: NEMS In Street Survey, Question 20

Types of Shops and Services Desired by Respondents

4.76 Respondents in both centres were asked what types of shops and services they would like to see more of. Within St. Helens town centre, the most popular response was that the centre would benefit from additional clothing stores (provided by 57.8% of respondents), followed then by department stores (43.1%). Just more than a quarter of respondents (26.5%) in St. Helens town centre identified that they would like to see more high street names in the centre, and 16.7% identified a need for more footwear stores. Within Earlestown town centre, 76.5% of respondents stated that they would like to see more clothing stores, 54.9% would like more high street names, and 27.5% wish to see more footwear stores. The higher figures recorded in Earlestown is perhaps reflective of its more modest clothing and footwear and national multiple offer.

Table 4.31: Types of Shops and Services Desired

Town	1st		2nd		3rd		4th	
St. Helens	Clothing Stores	57.8%	Department stores	43.1%	High Street names	26.5%	Footwear stores	16.7%
Earlestown	Clothing stores	76.5%	High Street names	54.9%	Footwear stores	27.5%	Better retail provision for children and Department stores	13.7%

Source: NEMS In Street Survey, Question 33

Types of Leisure Facilities Desired

4.77 Turning to the types of leisure facilities which respondents would like to see within St. Helens town centre, 23.5% of those surveyed indicated that they would like to see a bowling alley and 20.6%

mentioned a need for more entertainment/activities for young people. More than a third of those questioned in Earlestown (35.3% of respondents) did not provide an answer, but 31.4% of Earlestown respondents indicated that they would like to see more parks/gardens, followed by 23.5% who stated that they would like to see a children's activity centre.

Table 4.32: Types of Leisure Facilities Desired

Town	1st		2nd		3rd		4th	
St. Helens	Bowling Alley	23.5%	Entertainment/activities for young people	20.6%	Ice Rink	19.6%	None mentioned	17.7%
Earlestown	None Mentioned	35.3%	Parks/gardens	31.4%	Children's activity centre	23.5%	Don't know	11.8%

Source: NEMS In Street Survey, Question 34

Measures to Improve the Centre

- 4.78 Respondents within asked what measures they thought would improve the each of the centres. Within St. Helens town centre, 35.3% of respondents indicated that filling the vacant retail units would help to improve the centre and 27.5% stated that a 'general facelift' would assist. In addition, 21.6% of respondents stated that, if the quality of the shops were to be improved, this would also help the centre.
- 4.79 In Earlestown town centre, 47.1% of respondents stated that a general facelift would help to improve the centre and 39.2% stated that an improvement in the quality of the shops would also assist. From the responses given, there would appear to be a desire for Earlestown's general appearance to be improved.

Table 4.33: Most Popular Suggested Measures to Improve the Town Centre

Town	1st		2nd		3rd		4th	
St. Helens	Fill the empty shops	35.3%	General facelift	27.5%	Improve quality of shops	21.6%	Fewer low-quality shops	19.6%
Earlestown	Give it a general facelift	47.1%	Improve quality of shops	39.2%	Improved cleanliness	29.4%	Increased choice/range of shops	23.5%

Source: NEMS In Street Survey, Question 35

Biggest Weakness of the Town Centres

- 4.80 Respondents within each centre were also asked what they considered to be the biggest weaknesses of that particular centre. Within St. Helens town centre, the most popular response was that the



choice and range of shops was the biggest weakness (provided by 40.2% of respondents), followed by the number of empty shops (38.2%). The same two answers were also most frequently provided in Earlestown, with the choice and range of shops cited by almost half of respondents (49.0%) as a weakness and the number of empty shops identified by 41.2%.

Table 4.34: Biggest Identified Weaknesses of the Town Centre

Town	1st		2nd		3rd		4th	
St. Helens	Choice/ range of shops	40.2%	Empty shops	38.2%	Anti-social behaviour	14.7%	Town centre environment	11.8%
Earlestown	Choice/ range of shops	49.0%	Empty shops	41.2%	Town centre environment	13.7%	Lack of shops <i>and</i> Lack of leisure facilities	11.8%

Source: NEMS In Street Survey, Question 36

Night Time Economy

4.81 Turning to respondent's views on the night time economy, a high proportion of respondents within both St. Helens and Earlestown stated that they never visit the centres in the evening (66.7% and 70.6% respectively). Within St. Helens town centre, 15.7% of respondents stated they visit the centre in the evening less than once a month and 5.9% answered once a week.

Table 4.35: Frequency of Evening Visit to the Town Centre

Town	Every day	Once a week	Less than once a week	Less than once a fortnight	Less than once a month	Never
St. Helens	3.9%	5.9%	2.9%	4.9%	15.7%	66.7%
Earlestown	3.9%	7.8%	5.9%	2.0%	9.8%	70.6%

Source: NEMS In Street Survey, Question 43

4.82 The respondents were then asked why they visited in the evening. Within St. Helens town centre, 23.5% of respondents indicated that they visit in the evening to go to a pub and 17.7% stated that they visit to eat in a cafe. Within Earlestown, 46.7% stated that they visit the town in the evening to go to the Tesco on Earle Street and 40.0% stated that they visit a pub.

Table 4.36: Main Reason for Visiting in the Evening

Town	1st		2nd		3rd		4th	
St. Helens	Visit a pub	23.5%	Eat in a cafe	17.7%	Eat in a restaurant <i>and</i> Go to the cinema <i>and</i> Visit a bar	11.8%	-	-
Earlestown	Tesco, Earle Street	46.7%	Visit a pub	40.0%	Visit a bar <i>and</i> Evening non-food shopping	6.7%	-	-

Source: NEMS In Street Survey, Question 45

St. Helens Market

- 4.83 Finally, respondents in St. Helens town centre were asked how often they visited St Mary's Market and respondents in Earlestown were asked how often they visited Earlestown Market. As one would expect (given that it is a daily market), the responses indicate that St Mary's Market is typically visited more frequently than Earlestown Market (which takes place on Fridays and Saturdays). In Earlestown, 11.8% of respondents visit the market once a week or more, whilst in St. Helens 16.7% of respondents visit St Mary's Market once a week or more and 3.9% visit daily. However, in both centres, 29.4% of respondents never visit the respective market.

Table 4.37: Frequency of Visit to Market

Market	Daily	Once a week or more	Less than once a week	Less than once a fortnight	Less than once a month	First time today	Never
Earlestown Market	0.0%	11.8%	11.8%	7.8%	39.2%	0.0%	29.4%
St Mary's Market, St. Helens	3.9%	16.7%	11.8%	9.8%	28.4%	0.0%	29.4%

Source: NEMS In Street Survey, Question 39

In-Street Survey Summary and Conclusions

- 4.84 Overall, the in-street surveys for St. Helens and Earlestown town centre are useful in determining visitors' views in respect of the nature, quality and overall offer of each of the town centres. The surveys provide a basis for the Council in working up strategies to maintain and improve the town centre environments, ensuring that the town centres meet shoppers' and residents' demands and requirements.



- 4.85 Turning firstly to St. Helens, the surveys demonstrate that over 44% of respondents visit the centre as it is close to home and over 42% travel to the centre by bus. In terms of the additional shops and services which may be required within the centre, over 57% of the respondents stated that further clothing stores are required and over 43% cited the need for an additional department store. The top four responses provided all related to the requirement for additional clothing and footwear retailers within the centre or identified there to be a requirement for additional high street names. In terms of leisure facilities, over 23% of respondents stated that they'd like to see a bowling alley and over 20% identified that they would like to see more entertainment/activities for young people.
- 4.86 In terms of the questions relating to the weaknesses of the centre, over 35% of respondents identified that the need to reoccupy empty shops and over 27% stated that they would like to see a general facelift of units within the centre. Furthermore, over 40% of respondents identified the biggest weakness of the centre to be choice and range of shops. Accordingly, there is a clear desire from respondents to see a wider choice and range of retailers, and an acknowledgement that the reoccupation of vacant units would be of appreciable benefit to the centre. There is also an apparent reticence to visit the centre in the evening, with over 66% of respondents stating they would never visit St. Helens town centre in the evening.
- 4.87 Turning to Earlestown town centre, over 72% of respondents stated that they visit the centre as it is close to home, with 17% visiting to use the market. More than half of respondents (54.9%) stated that they walked to Earlestown town centre on the day of the survey. In terms of what respondents would like to see more of in the centre, over 76% stated that they wished to see more clothing stores, which is reflective of an obvious deficiency in the offer of the centre.
- 4.88 In terms of the centre's environmental quality, over 47% of respondents identified that a facelift would improve the centre and over 39% stated that an improvement in the quality of shops would be of benefit. In addition, over 29% of respondents indicated that improved cleanliness would help to improve the town centre.

5.0 Health Check Assessments

5.01 The NPPF identifies several factors which will be of relevance in delivering sustainable development, with one such factor being the need to ensure the vitality and viability of town centres. Paragraph 23 of the NPPF indicates that local authorities should promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. Paragraph 23 also requires local planning authorities to recognise that town centres are at the heart of their communities and to pursue policies that support their viability and vitality. It also states that competitive town centre environments should be promoted to enhance customer choice, provide a diverse retail offer and in order to reflect the individuality of town centres.

5.02 The criteria by which the health of a centre can be judged is set out in the Government's Ensuring the Vitality of Town Centres Planning Practice Guidance of March 2014. Indicators which should be monitored on a regular basis in order to judge the health of a centre and its performance over time include the following.

- **Diversity of uses** – Data on the diversity of uses in the town centres and the district and local centres was collated during our surveys in June 2016.
- **Proportion of vacant street level property** – Vacant properties were identified during the undertaking of the surveys.
- **Customers' views and behaviour** – Analysis of customers' views in respect of St. Helens town centre and Earlestown town centre.
- **Retailer representation** – Information on the performance of centres and the current strength of retailer representation has been derived from Venuescore's 2015-16 UK Shopping Venue Rankings.
- **Commercial rents** – Zone A rental data has historically been derived from Estates Gazette Interactive (EGi) data, which is a widely recognised source of such information. However, EGi has discontinued its reporting of such data and we have been unable to establish an alternative, reliable published source of such data. We are therefore unable to comment on any changes in commercial rents within the authority area.
- **Pedestrian flows** – General footfall and pedestrian flows were observed during the undertaking of the centre surveys.
- **Accessibility** – Consideration of access to and around each centre is informed by our site visits to each centre.
- **State of town centre environmental quality** – Consideration of the quality of the buildings and public realm in each of the centres has also been informed by our observations when undertaking field work.



5.03 We set out below our analysis of St. Helens town centre in respect of the above indicators. We have also visited each town, district and local centre in the St. Helens authority area as defined by the Core Strategy and, whilst not all of the above indicators are applicable to smaller centres, we provide an assessment of the health of these centres at Appendices 4, 5 and 6 and provide a plan showing the spatial distribution of the centres at Appendix 9. We summarise our key findings with regard to the centres later in this section of the report.

5.04 We commence our assessment by considering the role of St. Helens centres in the sub-regional shopping hierarchy as identified Venuescore's 2015-2016 UK Shopping Venue Rankings.

Defining Types of Sub-Regional Retail Hierarchy

5.05 Table 5.1 illustrates the position of the sub-region's principal centres based on Venuescore's Rankings. Venuescore's index ranks 2,705 retail venues within the UK (including town centres, stand-alone malls, retail warehouse parks and factory outlet centres), based on the strength of their current retail and food and drink provision. Towns and major shopping centres are rated using a scoring system which takes account of the presence in each location of multiple retailers – including anchor stores, fashion operators and non-fashion multiples.

5.06 Venuescore allocates each centre to a tier, reflecting its role and function. The eight tiers comprise (highest to lowest): 'Major City', 'Major Regional', 'Regional', 'Sub-Regional', 'Major District', 'District', 'Minor District' and 'Local'. The rankings in the table represent the position of the centres at the time of the 2015-16 Rankings, as well as competing surrounding shopping venues.

5.07 The table shows that St. Helens town centre, as well as some nearby centres such as Warrington, Southport and Birkenhead, has fallen in the Venuescore rankings since 2013. The Venuescore rankings suggest that there has been a gradual decline in the performance of North West 'regional' centres over the last few years.



Table 5.1: Venuescore's Sub-Regional Shopping Hierarchy

Venue	Score 2014-15	Local Authority	Location Grade 2014-15	2015-16 Rank	2014-15 Rank	2013-14 Rank	Change in Rank (13-16)
Liverpool	551	Liverpool	Major City	5	5	5	0
Preston	238	Preston	Major Regional	56	52	60	+4
Warrington	221	Warrington	Regional	70	76	69	-1
Southport	188	Sefton	Regional	100	96	93	-7
Birkenhead	142	Wirral	Regional	163	142	134	-29
St. Helens	144	St. Helens	Regional	166	163	161	-5
Bootle	91	Sefton	Sub-Regional	297	235	229	-66
Widnes	42	Halton	District	735	693	714	-21
Ravenhead Retail Park	33	St. Helens	District	974	1,021	864	-110
Earlestown	23	St. Helens	Minor District	1372	1,207	1155	-217
St. Helens Retail Park	21	St. Helens	Minor District	1486	1,361	1204	-282
Haydock, St. Helens	17	St. Helens	Local	1789	1,792	1684	-105
Boundary Road, St. Helens	15	St. Helens	Local	2034	2,146	1907	-127
Peasley Cross Lane, St. Helens	13	St. Helens	Local	2394	2,557	2428	+34
Newton Le Willows	11	St. Helens	Local	2827	2,775	2428	-399
St. Helens, Baxter Lane	10	St. Helens	Local	3152	N/A	N/A	N/A

Source: Venuescore 2013-14, 2014-15 and 2015-16 UK Shopping Venue Rankings

St. Helens Town Centre Health Check Assessment

5.08 St. Helens town centre is the principal retail, commercial and administrative centre of the Borough as defined by the adopted Core Strategy. A full assessment of St. Helens town centre can be found at Appendix 4.

Diversity of Uses

5.09 Based on the boundary defined by Experian Goad, St. Helens town centre had 443 retail units in June 2016. This represents a small increase of four units since the undertaking of our previous survey in March 2011. This is attributed to the sub-division of existing vacant units and, as a consequence, the quantum of retail and service floorspace in the town centre remains the same at 2016 as it was at 2011 (116,380 sq.m gross). There has been no significant physical development resulting in an increase in retail floorspace within the Goad boundary since our previous survey in 2011. We do note however, that there have been some changes in terms of the presence of retailers (for example, Tesco relocating and The Range taking the former store).



Table 5.2: St. Helens Town Centre Diversity of Use for Commercial Units

	2009		2011		2016		UK Average
	No. of Outlets	%	No. of Outlets	%	No. of Outlets	%	%
Convenience	38	8.7%	39	8.9%	43	9.9%	8.6%
Comparison	138	31.5%	136	31.0%	121	27.1%	32.0%
Leisure Service	54	12.3%	56	12.8%	54	12.2%	13.9%
Retail Service	104	23.7%	102	23.2%	107	24.2%	23.4%
Financial and Business Service	50	11.4%	50	11.4%	48	10.8%	10.6%
Vacant	54	12.3%	56	12.8%	70	15.8%	11.2%
Total	438	100.0%	439	100%	443	100%	100%

Source: WYG survey of June 2016, based on Experian Goad town centre boundary and Goad survey data January 2015. UK average figure is at June 2016 (taken from Goad Category Report averages)

Table 5.3: St. Helens Town Centre Diversity of Use for Commercial Floorspace

	2009		2011		2016		UK Average
	sq.m	%	sq.m	%	sq.m	%	%
Convenience	20,920	18.0%	21,960	18.9%	14,700	12.8%	15.2%
Comparison	40,450	34.7%	39,210	33.7%	46,640	39.9%	35.9%
Leisure Service	5,830	5.0%	5,800	5.0%	5,650	4.9%	6.7%
Retail Service	27,390	23.5%	27,140	23.3%	31,580	27.1%	24.4%
Financial and Business Service	8,440	7.3%	8,480	7.3%	7,470	6.4%	8.0%
Vacant	13,380	11.5%	13,800	11.9%	10,340	8.9%	9.0%
Total	116,410	100.0%	116,390	100%	116,380	100%	100%

Source: WYG survey of June 2016, based on Experian Goad town centre boundary and Goad survey data January 2015. UK average figure is at June 2016 (taken from Goad Category Report averages)

5.10 There are currently 43 convenience units in St. Helens town centre, which account for 9.7% of the total number of units. This is slightly greater than the national average of 8.6%. However, the proportion of convenience goods floorspace is 12.6% which is lower than the UK national average of 15.2% for total convenience goods floorspace. This can be partly attributed to Tesco relocating its town centre store out of the town centre in 2011.

5.11 There are 121 comparison goods units in St. Helens town centre which account for 27.3% of the total units. This is slightly lower than the national UK average of 32.0%. However, the total comparison goods floorspace equates to 46,640 sq.m gross (or 40.1% of the total floorspace) which is greater than the national average of 35.9% of commercial floorspace being in comparison goods use. The

quantum of comparison goods floorspace has significantly increased since our previous survey in 2011, at which point 39,210 sq.m of gross floorspace was dedicated to this use. The change is primarily attributable to the occupation of the former Tesco store at Chalon Way by The Range.

- 5.12 St. Helens town centre is slightly underrepresented in terms of retail service units, in respect of both the number of units and the provision of floorspace when compared to the national UK average. There are currently 54 retail service units, which represent 12.2% of the overall number of commercial units (the UK national average is 13.9% of units dedicated to retail service uses). The retail service units equate to 5,650 sq.m (gross) floorspace which comprises 4.9% of the total floorspace within the centre. Again, this figure is less than the national average figure of 6.7%.
- 5.13 Leisure service units comprise a sizeable part of the composition of the town centre, with 107 units comprising 24.2% of the total units (a figure broadly comparable to the national average of 23.4%). The total leisure service floorspace is 31,580 sq.m (gross), which equates to 27.1% of the total floorspace, and is greater than the national average of 24.4% of commercial floorspace being in leisure service use.
- 5.14 There are 48 financial and business service units in St. Helens town centre, equating to 10.8% of the total units; this is also comparable to the national average of 10.6%. However, in respect of financial and business service floorspace, the provision equates to 7,470 sq.m (gross) or 6.4% of the total stock of floorspace. This is below the national average of 8.0%.
- 5.15 At the time of our survey, there were 70 vacant units in St. Helens town centre. This represents 15.8% of the total units, which is significantly greater than the national average vacancy rate of 11.2%. However, there was a total of 10,340 sq.m (gross) of vacant floorspace, which comprises 8.9% of the total commercial floorspace within the centre. This is comparable to the national average floorspace vacancy rate of 9.0%. These figures demonstrate that whilst there are a higher than average number of units currently vacant, these are typically (although not in every case) smaller units.

Retailer Representation

- 5.16 Key national retailers present in St. Helens town centre include Boots, H&M, Marks & Spencer, Argos, Clarks, Superdrug, River Island, Wilkinson, New Look, Topshop and Clintons. Other important national multiples include banks such as Barclays, HSBC, NatWest, RBS and Santander. There are also a number of national supermarket retailers present within the centre as defined by Experian Goad,



including Asda, Heron Foods, Iceland and Lidl. However, since the previous Study some national multiples, including Dorothy Perkins and WH Smith, have closed.

Pedestrian Flows

- 5.17 Consistent levels of pedestrian activity were observed throughout the primary shopping area and central retail core. This activity is assisted by the pedestrianised nature of many of the centre's streets, including Church Street, Church Square, Hardshaw Street, Barrow Street, the Church Square Shopping Centre (Lagrange Arcade and St Mary's Arcade), Ormskirk Street and the Hardshaw Centre.
- 5.18 Out of the three shopping centres, the highest levels of pedestrian activity were observed in the Church Square Shopping Centre (Lagrange Arcade). This is reflective of the high volume of comparison good retailers and good representation from national multiple retailers, drawing shoppers into the shopping centre.
- 5.19 We observed that the level of pedestrian activity in the peripheral parts of the existing town centre boundary diminished considerably, particularly on Duke Street at the northern point of the town centre, as well as on Claughton Street which adjoins the primary shopping area to the north-east.

Accessibility

- 5.20 St. Helens town centre is reasonably well connected to the strategic highway network. The M62 is located approximately 6 km to the south of the town centre and is accessed via the St. Helens Linkway. To the north of the town centre, the A580 leads to Junction 23 of the M6 which is approximately 8 km from the centre.
- 5.21 The Council operates 16 car parks within the town centre, in which there are both short stay and long stay facilities present. The Claughton Street car park is exclusive to blue badge holders and therefore assists with disabled access to the town centre. There is also significant on-street parking provision within the town centre.
- 5.22 St. Helens (Central) railway station is located within the existing town centre boundary and is situated in close proximity to the Hardshaw Centre and St Mary's Arcade. The station is situated in a central location and is highly accessible in relation to the town centre and primary shopping area. Regular services are provided to Liverpool Lime Street and Wigan North Western.

Perception of Safety

- 5.23 We consider St. Helens town centre to generally feel safe and secure. The main shopping areas have

sufficiently high levels of pedestrian activity and, for the most part, have active retail frontages that provide natural surveillance within the streets. The sense that the 'retail core' is overlooked is heightened by the fact that the majority of this area is either within a shopping centre or is pedestrianised with these areas mostly being overlooked by CCTV. The pedestrianised shopping area has an added benefit to safety, as it also reduces the risk of vehicle and pedestrian conflict.

- 5.24 However, peripheral parts of the town centre – most notably areas with a high vacancy rate such as Duke Street – give the perception of a less safe environment due to the reduced level of pedestrian activity and natural surveillance.

Town Centre Environmental Quality

- 5.25 We found the environmental quality within the defined primary shopping area to be of good quality, in particular along the primary retail frontages on Church Street and Church Square, where considerable investment has contributed to creating a modern and attractive public space and street scene. The pedestrianisation of the area has allowed additional space to incorporate attractive public realm and planting schemes.
- 5.26 There is ample public seating available on Church Street and Church Square and consideration has been given to the design, with a consistent approach to public realm adopted throughout the centre. The retail frontage itself is consistent with that of a typical high street environment with generally modern shop fronts. St. Helens Parish Church itself contributes to the attractive environment within the centre and increased levels of seasonal planting and seating are situated within the square surrounding the building.
- 5.27 The non-pedestrianised Ormskirk Street is also of a good environmental quality. There is a small public square at the junction with Westfield Street, incorporating seating, ornamental bollards and facilities to store bikes securely. The relatively wide pavements also increase the quality of the approach south into Church Street. Additionally, there is ample street lighting within the primary shopping area which provides contributes to maintaining the quality and safety of the environment at night.
- 5.28 The quality of the built environment is noticeably poorer outside of the retail core. The northern part of Ormskirk Street, beyond the junction with Westfield Street, has noticeably poorer quality frontages and there is a cluster of vacant units at the northern point where it adjoins with King Street. Some of these units have poor quality shutters or are boarded up. The environmental quality in the town centre continues to decrease moving northwards, towards and along Duke Street.



Hierarchy of Centres and Role of Town, District and Local Centres

- 5.29 Beneath the town centre within the adopted hierarchy of the centres within the Core Strategy, there are a range of smaller centres across the Borough that perform different roles in the retail hierarchy. It is important that an appropriate hierarchy of centres is identified within the St. Helens administrative area in order that residents’ day to day retail, service and civic needs are provided for in accessible locations. The retail hierarchy is currently defined within the wider settlement hierarchy for St. Helens, outlined in Policy CSS 1 ‘Overall Spatial Strategy’ of the St. Helens Core Strategy and a plan showing the spatial distribution of the centres is included at Appendix 9.
- 5.30 St. Helens town centre is the principal town in the Borough; Earlestown is designated as a second tier town centre, whilst Rainhill and Thatto Heath are designated as district centres. There are also 12 local centres currently designated.

Smaller Town and District Centres

- 5.31 We summarise our assessments of the vitality and viability of Earlestown town centre and the district centres of Rainhill and Thatto Heath below.

Earlestown Town Centre

- 5.32 Earlestown serves the western part of the wider settlement of Newton-le-Willows, located to the east of the St. Helens administrative area. A full health check assessment of Earlestown town centre is provided at Appendix 5.
- 5.33 Tables 5.4 and 5.5 below set out the diversity of uses in Earlestown town centre.

Table 5.4: Earlestown Town Centre Diversity of Use for Commercial Units

Category	No.	%	UK*
Convenience	8	6.3%	8.6 %
Comparison	32	25.2%	32.0 %
Retail Service	28	22.0%	13.9 %
Leisure Service	36	28.3%	23.4%
Financial and Business Service	8	6.3%	10.6%
Vacant	15	11.7%	11.2%
Total	127	100%	100%

Source: WYG site visit in June 2016, national average figures from Experian Goad Category Report (June 2016)
 Note: Figures comprise units within the centre boundary as defined by the St. Helens UDP 1998 Proposals Map Earlestown Inset



Table 5.5: Earlestown Town Centre Diversity of Use for Floorspace

Category	sq.m	%	UK*
Convenience	3,809	17.9%	15.2%
Comparison	7,477	35.1%	35.9%
Retail Service	3,235	15.2%	6.7%
Leisure Service	4,762	22.4%	24.4%
Financial and Business Service	856	4.0%	8.0%
Vacant	1,157	5.4%	9.0%
Total	21,296	100%	100%

Source: WYG site visit in June 2016, national average figures from Experian Goad Category Report (June 2016)
Note: Figures comprise units within the centre boundary as defined by the St. Helens UDP 1998 Proposals Map Earlestown Inset

- 5.34 The convenience goods offer in Earlestown is dominated by the Tesco Superstore located on Earle Street, which represents 79% of the total convenience goods floorspace in the town centre. In respect of the provision of convenience units, there are eight units representing 6.3% of the total stock of commercial units in the town centre. This is below the national average figure of 8.6% of commercial stock being occupied by convenience goods retailers.
- 5.35 There is a total of 3,809 sq.m (gross) of convenience goods floorspace within the town centre, which represents 17.9% of the total stock of retail and service floorspace. This is greater than the national average of 15.2% of floorspace being in convenience goods use. This can be attributed to the presence of the Tesco foodstore, which is by some distance the largest unit in the town centre (providing 3,004 sq.m (gross) retail floorspace).
- 5.36 Earlestown has 32 comparison goods units, which represent 25.2% of the total units in the town centre. The representation is below the national average figure of 32.0% of the stock of commercial units being in comparison goods use. There is a total of 7,477 sq.m (gross) comparison goods floorspace, which equates to 35.1% of the total retail and service floorspace. This figure is broadly comparable with the national average figure of 35.9%. Overall, Earlestown is considered to have a limited comparison goods offer.
- 5.37 There are 28 retail service units, equating to 22.0% of the total stock of commercial units. The level of provision is significantly greater than that which is apparent throughout the country, with the national average being just 13.9%. A similar trend is apparent when considering the provision of retail service floorspace, with the 3,235 sq.m of retail floorspace equating to 15.2% of the commercial stock. This is significantly greater than the national average of 6.7% of commercial floorspace being

in retail service use.

- 5.38 Earlestown has a good provision of leisure service units, with its 36 units equating to 28.3% of the total stock of commercial units. This is approximately 5% greater than the national average figure of 23.4%. Whilst the representation of leisure service units is above national average level, in terms of floorspace such uses provide 4,762 sq.m of floorspace in Earlestown town centre, which represents 22.4% of the total stock of commercial floorspace. This is slightly below the national average figure of 24.4%. We believe that this is attributable to the high proportion of small leisure service units which are occupied by uses such as takeaways and cafes, and a lack of large leisure service units accommodating uses such as health clubs and gyms.
- 5.39 The town centre's financial and business service offer comprises eight units, which represent 6.3% of the total stock of commercial units. This is below the national average of 10.6%. Financial and business service units comprise 856 sq.m of the centre's retail and service floorspace, which equates to 4.0% of the total commercial floorspace and is significantly below the national average of 8.0%.
- 5.40 There are 15 vacant units within the existing town centre boundary. These units are distributed throughout the town centre, with no specific clusters, although eight of the 15 vacant units are distributed sporadically along Bridge Street. There are a further four vacant units located on Bridge Street, situated just outside of the town centre boundary to the north. The vacant units comprise 11.7% of the town centre's retail stock which is 0.6 percentage points above the national average of 11.2%.
- 5.41 In terms of the amount of vacant floorspace, the 15 vacant units occupy 5.4% (1,157 sq.m gross) of the town centre's vacant floorspace, which is significantly lower than the national average of 9.0% for vacant retail and service floorspace. Again, this is attributable to the high proportion of small retail units within the town centre.
- 5.42 In terms of accessibility, Earlestown is well connected in respect of both the national strategic highway network and public transport. Junction 23 of the M6 motorway is located approximately 3.9 kilometres north of the town centre. Earlestown has both a railway station and bus station located within the town centre boundary, providing access to local and regional destinations.
- 5.43 In summary, we believe Earlestown to have a reasonable provision of goods and services for a centre of its size, though it has a relatively limited comparison goods offer. It is highly accessible from the surrounding residential areas and from other parts of the Newton-le-Willows area. Earlestown town



centre provides a local community focus and its retail and service offer is sufficient to meet the day to day needs of the surrounding community. Its convenience goods offer is significantly strengthened by the presence of the Tesco foodstore within the town centre boundary. Earlestown is, however, poorly represented by national multiple retailers.

Rainhill District Centre

- 5.44 Rainhill is defined as a district centre in the St. Helens Core Strategy. It is located approximately 8 km south of St. Helens town centre and is accessed by road via the St. Helens Linkway from the north. The centre currently contains 64 retail and service units which comprise 6,478 sq.m of gross floorspace. A full health check assessment of Rainhill district centre is provided at Appendix 6.
- 5.45 Tables 5.6 and 5.7 below set out the diversity of uses in Rainhill district centre.

Table 5.6: Rainhill District Centre Diversity of Use for Commercial Units

Category	No.	%	UK*
Convenience	4	6.3%	8.6 %
Comparison	14	21.9%	32.0 %
Retail Service	17	26.6%	13.9 %
Leisure Service	15	23.4%	23.4%
Financial and Business Service	11	17.2%	10.6%
Vacant	3	4.7%	11.2%
Total	64	100%	100%

Source: WYG site visit in June 2016, national average figures from Experian Goad Category Report (June 2016)

Table 5.7: Rainhill District Centre Diversity of Use for Floorspace

Category	Sq.m	%	UK*
Convenience	923	14.2%	15.2%
Comparison	1,345	20.8%	35.9%
Retail Service	1,532	23.6%	6.7%
Leisure Service	1,797	27.7%	24.4%
Financial and Business Service	721	11.1%	8.0%
Vacant	160	2.5%	9.0%
Total	6,478	100%	100%

Source: WYG site visit in June 2016, national average figures from Experian Goad Category Report (June 2016)

- 5.46 The convenience goods offer in Rainhill is limited, consisting of just four units which comprise 6.3% of the total stock of commercial units. This is below the national average level of 8.6%. In respect of convenience goods floorspace, the four units equate to 923 sq.m (gross) which is 14.2% of the total

stock, just below the national average figure of 15.2%. Notwithstanding this, the four convenience units include a Co-op foodstore, butchers, bakers and greengrocer, and despite the low proportion of convenience units, the existing convenience goods operators are considered to meet some of the day to day needs of the local residents and 'top-up' convenience shopping requirements. The Co-op foodstore is the largest retail and service unit in Rainhill district centre.

- 5.47 A total of 14 units are accommodated by comparison goods retailers, which equates to 21.9% of the total commercial units. These retailers occupy 1,345 sq.m (gross) floorspace, which equates to 20.8% of the total retail floorspace. The proportion of units and floorspace occupied by comparison goods retailers are both below the respective national averages of 32.0% and 35.9%. However, district centres will typically provide a relatively limited comparison goods offer as their principal role is to meet the day to day needs of local residents.
- 5.48 Rainhill has good representation from the retail service and leisure service sectors, and has a particularly strong financial and business services offer with 11 units comprising 17.2% of the total stock (which is significantly higher than the national average of 10.6%).
- 5.49 There are just three vacant units in Rainhill, which equates to 4.7% of the total stock and provides a combined floorspace of 160 sq.m (equating to just 2.5% of the total retail and service floorspace in the centre). This is considerably lower than the respective national averages of 11.2% of commercial units and 9.0% of vacant floorspace. The low vacancy rate is one indicator which suggests that Rainhill is a viable district centre.
- 5.50 Overall, Rainhill accommodates a good range of uses. Whilst a relatively low proportion of units are occupied by convenience goods operators, the provision is bolstered by the Co-op foodstore. However, there is a lack of a large format foodstore, the closest being the Tesco Extra located approximately 3.2 kilometres north-west of Rainhill in Prescot.
- 5.51 There is a relatively good provision of community facilities, with the village hall and a dentist being located within the district centre boundary and the Millennium Centre (Church Hall), library and medical centre located just outside of the boundary to the east (within approximately 100 metres walking distance). The centre has good accessibility for those arriving by private vehicle and public transport, with the railway station providing access to both Liverpool and Manchester.
- 5.52 Overall, we consider Rainhill to have facilities consistent with a district centre designation in the context of the network of centres in the authority area. There is representation across all of the retail



and service sectors, with a particularly strong financial and business services offer being evident. There are also a number of community facilities within and in close proximity to the centre that are considered to have close connections with the district centre.

Thatto Heath District Centre

5.53 Thatto Heath is a defined district centre in the St. Helens Core Strategy. The centre contains 48 retail units and 5,980 sq.m (gross) of floorspace. The centre is situated around Thatto Heath Lane and Elephant Lane, with the majority of the retail units located along the west of Thatto Heath Lane and to the south of Elephant Lane. To the north of Elephant Lane and east of Thatto Heath Lane is an area of existing and former community buildings, include the police station, the medical centre and a children’s nursery. These uses are situated around a landscaped area and a relatively newly created and well maintained car park. A full health check assessment of Thatto Heath district centre is provided at Appendix 6. Tables 5.8 and 5.9 below set out the diversity of uses in the district centre.

Table 5.8: Thatto Heath District Centre Diversity of Use for Commercial Units

Category	No.	%	UK*
Convenience	5	10.4%	8.6%
Comparison	8	16.7%	32.0%
Retail Service	10	20.8%	13.9%
Leisure Service	15	31.3%	23.4%
Financial and Business Service	3	6.3%	10.6%
Vacant	7	14.6%	11.2%
Total	48	100%	100%

Source: WYG site visit in June 2016, national average figures from Experian Goad Category Report (June 2016)

Table 5.9: Thatto Heath District Centre Diversity of Use for Floorspace

Category	Sq.m	%	UK*
Convenience	911	15.2%	15.2%
Comparison	919	15.4%	35.9%
Retail Service	711	11.9%	6.7%
Leisure Service	2,448	40.9%	24.4%
Financial and Business Service	189	3.2%	8.0%
Vacant	802	13.4%	9.0%
Total	5,980	100%	100%

Source: WYG site visit in June 2016, national average figures from Experian Goad Category Report (June 2016)

5.54 The proportion of convenience units and floorspace within Thatto Heath are above the UK average at 10.4% (units) and consistent with the UK average at 15.2% (floorspace) respectively (the UK

averages are 8.6% and 15.2% respectively). This is a consequence of the various smaller convenience stores on offer, including the Co-op, Londis, bakers, deli, newsagent and an independent discount convenience retailer. The Co-op appeared to be the busiest unit at the time of our visit.

- 5.55 The proportion of units and floorspace occupied by comparison goods retailers is 16.7% (units) and 15.4% (floorspace) which, in both cases is significantly below the UK average at 32.0% and 35.9% respectively. However, district centres typically have a below average provision of comparison goods operators, as their focus is generally meeting the day-to-day needs of a local catchment. The level of retail service uses is above the national average, both in terms of the proportion of units and floorspace dedicated to this use (20.8% of units and 11.9% of floorspace is in retail service use, which compares to the respective national average figures of 13.9% and 6.7%).
- 5.56 In terms of vacancies, 14.6% of units are vacant, which is higher than the national average of 11.2%. The proportion vacant floorspace in Thatto Heath is also significantly above national average level at 13.4% (the national average is 9.0%).
- 5.57 Overall, Thatto Heath has a relatively strong convenience goods offer, with the Co-op and Londis small format foodstores being supplemented by smaller, independent convenience specialists. There is a lack of a large format foodstore, with the closest being the Morrisons at Boundary Road, approximately 1.5 kilometres to the north, and the Tesco Extra and Aldi stores, both of which are approximately 2.5 kilometres to the north-east of the centre. The centre accommodates a medical centre and police station, and Thatto Heath library is within walking distance to the north.
- 5.58 The centre is accessible to those arriving by private vehicle and by bus, plus the presence of the railway station significantly enhances the centre's overall accessibility. The centre is generally well maintained, but at the time of our survey, the level of maintenance declined towards the edge of the centre. The centre's proximity to nearby residential dwellings promotes sustainable travel and helps facilities meet the day to day needs of local residents.

Local Centres

- 5.59 Adopted Core Strategy Policy CSS 1 identifies the following as local centres: Billinge; Chain Lane; Chancery Lane; Clispley Lane; Denton's Green; Eccleston; Fingerpost; Marshall's Cross; Newton-le-Willows; Newtown; Rainford; and, Sutton. Full health check assessments of the defined local centres are provided at Appendix 7.

5.60 A definition of local centres is not provided in the NPPF or in the associated Ensuring the Vitality of Town Centres Planning Practice Guidance, but was previously included in the now superseded Planning Policy Statement 4: Planning and Economic Development (published December 2009). The definition within the withdrawn PPS4 indicates that:

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

5.61 Therefore, local centres have a role of catering for the day to day shopping needs of the local communities which they serve. Local centres typically serve a smaller catchment than town or district Centres, and are unlikely to cater for the same level of passing trade. They are primarily intended to serve the needs of the population within walking distance.

5.62 Overall, we believe that the local centres in St. Helens generally provide an offer consistent with the definition provided by the withdrawn PPS4. The centres provide an important local service that serves the day to day needs of residents within the surrounding catchments. The one exception to this is Chancery Lane, which was found to no longer perform the role and function of a local centre. Chancery Lane has lost several retail units to residential use and, in our view, the shopping facilities no longer function as a local centre. We cover this in more detail in the respective healthcheck at Appendix 7.

Retail Parks

5.63 St. Helens is relatively well served by out of centre retail parks, containing a range of medium to large scale retail warehouses and smaller scale leisure units, occupied by a range of restaurant and coffee shop operators.

5.64 The two main retail parks in the Borough are Ravenhead Retail Park and St. Helens Retail Park, with a further smaller park currently being developed at Westpoint (where the Aldi is already completed and trading and Costa has now opened). We provide an overview of the two retail parks at Table 5.12 below and analyse the current performance of the parks at Section 7 below.

Table 5.12: Principal Retail Parks in St. Helens

Retail Park	Town	Zone	Type	Units						Total Floorspace (sq.m)
				Convenience	Comparison	Leisure Service	Retail Service	Vacant	Total	
Ravenhead Retail Park	St. Helens	1	Open A1 and wide bulky	0	14	5	0	2	21	27,930
St. Helens Retail Park	St. Helens	1	Part Open A1 and part bulky	2	13	0	0	0	15	11,149

Note: Details taken from Agent's particulars on Completely Retail

- 5.65 Both Ravenhead and St. Helens provide retail warehouse space for range of national multiple retailers, from traditional 'bulky' retailer such as Dunelm, Halfords, Topps Tiles, B&Q, Carpetright and Currys, to more traditional 'high street' retailers such as Boots, Argos, Poundworld and Next. In addition, Ravenhead Retail Park also includes a range of leisure operators including Subway, Frankie and Benny's, Costa, Burger King and DW Sports.
- 5.66 The retail park provision is strong for a town the size of St. Helens, and due to their location in close proximity to St. Helens town centre, the overall offer of national multiple comparison retailers within Zone 1 in particular is considered to be good.

6.0 Population and Expenditure

6.01 This section of the report considers the population and available expenditure (for both convenience and comparison goods) across the Study Area.

Study Area Population

6.02 The population within each postal code sector and each zone at 2017 has been calculated using Experian Micromarketer G3 data (2016 estimate, which was issued in December 2017). The population within each study zone at the 2017 base year and in each of the forecast years was sourced from Experian Micromarketer G3 data (which was issued in December 2017). Experian's baseline population data estimates take into consideration the findings of the 2011 Census release, which is then projected forward by Experian using growth rates derived from ONS population projections.

6.03 Table 6.1 demonstrates that between 2017 and 2033, the population within the Study Area is forecasted to increase by 20,212 persons, or an increase of 5.6% over the 16 year period to 2033. The increase in population within the St. Helens administrative area is forecast to be 7,965, equating to an increase of 4.4% over the 16 year period.

Table 6.1: Study Area Population by Survey Zone (2017 to 2033)

Zone	2017	2018	2023	2028	2033
1	77,718	78,052	79,532	80,738	81,798
2	91,500	91,813	93,588	95,125	96,060
3	23,556	23,662	24,063	24,417	24,778
4	81,078	81,648	84,550	86,999	89,161
5	51,051	51,098	51,477	51,912	52,287
6	35,493	35,552	36,047	36,344	36,524
Total	360,396	361,825	369,257	375,535	380,608

Source: Experian Micromarketer G3 December 2017 data release

6.04 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. Experian is a widely accepted source of expenditure and population data and is regularly used by WYG in calculating retail capacity.

6.05 The base year for the Experian expenditure data is 2016. Per capita growth forecasts have been derived from Experian Retail Planner Briefing Note 15, which was published in December 2017. Appendix 3 of the Retail Planner Briefing Note identifies the following annual growth forecasts for convenience and comparison goods which inform our assessment.

Table 6.2: Expenditure Growth Forecasts

Year	Convenience (%)	Comparison (%)
2017	0.1	2.4
2018	-0.7	0.8
2019	-0.2	2.1
2020	0.2	2.9
2021	0.2	3.3
2022	0.1	3.4
2023	-0.1	3.4
2024	0.1	3.3
2025	0.1	3.2
2026	0.1	3.2
2027	0.1	3.1
2028	0.1	3.0
2029	0.0	3.1
2030	0.0	3.2
2031	0.2	3.4
2032	0.1	3.3
2033	0.2	3.4

Source: Appendix 3, Retail Planner Briefing Note 15 (December 2017)

6.06 The latest growth forecasts suggest that Brexit will likely influence per capita expenditure growth in 2017 and 2018, but that retail sales should recover somewhat over the medium term as confidence in the economy returns. However, the outlook is considerably more positive for comparison goods expenditure than it is for convenience goods expenditure.

6.07 However, it should be noted that growth in expenditure forecasting in the longer term (beyond the next ten years) should be treated with caution given the inherent uncertainties in predicting the economy's performance over time. Assessments of this nature should therefore be reviewed on a regular basis in order to ensure that forecasts over the medium and long are reflective of any changes to relevant available data.



- 6.08 Experian Retail Planner Briefing Note 15 also provides forecasts in respect of the proportion of expenditure which will be committed through special forms of trading (comprising 'non-store retailing', such as internet sales, TV shopping and so on) over the reporting period. We have 'stripped out' any expenditure which survey respondents indicated was committed via special forms of trading and instead have made an allowance derived from Experian's recommendation.
- 6.09 In considering special forms of trading, it should be noted that many products which are ordered online are sourced from a physical store's shelves or stockroom (particularly in the case of convenience goods). As such, expenditure committed in this manner acts to support stores and should be considered 'available' to tangible retail destinations.
- 6.10 Accordingly, in order not to overstate the influence of expenditure committed via special forms of trading, our approach is based on Experian's 'adjusted' figure for special forms of trading (provided at Figure 5 of Appendix 3 of its Retail Planner Briefing Note 15) which makes an allowance for internet sales which are sourced from stores. The proportion of expenditure committed through special forms of trading cited below at Table 6.3 is 'stripped out' of the identified expenditure as it is not available to stores within the Study Area.

Table 6.3: Special Forms of Trading Forecasts

Year	Convenience (%)	Comparison (%)
2017	3.2	14.8
2018	3.4	15.4
2023	4.2	17.4
2028	4.8	17.6
2033	5.2	17.9

Source: Figure 5 of Appendix 3, Experian Retail Planner Briefing Note 15 (December 2017)

- 6.11 Based on the above growth rates and special forms of trading allowances, it is possible to produce expenditure estimates for each survey zone under each population growth scenario at 2016, 2018, 2023, 2028 and 2033. In doing so, our assessment considers both per capita retail expenditure growth and population change.

Convenience Goods Expenditure

- 6.12 Taking into consideration the above increases in population, Table 6.4 indicates that, at 2017, the available convenience expenditure across the Study Area is estimated to be £741.9m, increasing to



£770.6m at 2033. Accordingly, by the end of the 16 year reporting period to 2033, it is estimated that convenience goods expenditure in the Study Area will increase by £28.7m.

Table 6.4: Total Available Study Area Expenditure – Convenience Goods (£m)

2017 (£m)	2018 (£m)	2023 (£m)	2028 (£m)	2033 (£m)	Growth 2017-2018 (£m)	Growth 2017-2023 (£m)	Growth 2017-2028 (£m)	Growth 2017-2033 (£m)
741.9	738.1	748.3	759.9	770.6	-3.8	6.4	18.0	28.7

Note: In 2016 prices

Main Food and 'Top-Up' Shopping

- 6.13 To assist in the assessment of quantitative need, we have applied an estimate to account for the proportion of convenience goods expenditure which is committed through main food shopping trips and that which is committed through 'top-up' shopping trips. Based on our experience, we consider that approximately 70% of individuals' convenience goods expenditure will be committed through main food shopping trips and the remaining 30% will be committed through top-up shopping.
- 6.14 Our estimate of the split between these two types of expenditure on a zonal basis is provided below at Table 6.5. On this basis, we estimate that across the Study Area at 2017, £511.4m of convenience goods expenditure will be spent during main food shopping trips and £219.2m during top up shopping trips.

Table 6.5: Assumed Split of Convenience Goods Expenditure between Main and Top-Up Shopping

Zone	Main Food	Top-Up
1	107.8	46.2
2	136.0	58.3
3	33.4	14.3
4	112.2	48.1
5	74.8	32.0
6	55.1	23.6
Total	519.3	222.6

Comparison Goods Expenditure

- 6.15 For comparison goods, Table 6.6 below provides a breakdown of the total available comparison goods expenditure within the Study Area between 2017 and 2033. The available comparison goods expenditure at 2017 is estimated to be £994.6m, increasing to £1,624.3m at 2033. Accordingly, across the 16 year reporting period, the growth in Study Area comparison good expenditure is



£625.8m. This is a clearly a significantly greater increase in available expenditure than that which is forecast to occur for convenience goods.

6.16 Whilst the identified expenditure increase is very significant indeed, the rate of growth is more modest than that previously achieved, principally because of the expectation that an ever-increasing proportion of comparison goods expenditure will be committed through special forms of trading (most particularly, internet shopping).

Table 6.6: Total Available Study Area Expenditure – Comparison Goods (£m)

2017 (£m)	2018 (£m)	2023 (£m)	2028 (£m)	2033 (£m)	Growth 2017-2018 (£m)	Growth 2017-2023 (£m)	Growth 2017-2028 (£m)	Growth 2017-2033 (£m)
994.6	999.4	1,155.3	1,369.1	1,624.3	4.8	160.6	374.5	625.8

In 2016 prices

6.17 For the purposes of this Study, comparison goods expenditure has been divided into eight sub-categories: 'DIY' 'Electrical' and 'Furniture' (these three categories collectively being referred to as bulky goods); and, 'Clothing & Footwear', 'CDs, DVDs and Books', 'Health and Beauty/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.

6.18 In considering the above, it should be noted that if an excess of expenditure manifests itself within the Study Area, this does not necessarily translate directly into a requirement for additional floorspace. In assessing quantitative need, it is also necessary to take account of:

- Existing development proposals;
- Expected changes in shopping patterns; and
- The future efficiency of retail floorspace.

Market Shares

6.19 Having calculated the likely levels of expenditure that are generated by the resident population within the defined Study Area, it is also relevant to consider what proportion of this expenditure is currently retained by retail facilities within St. Helens (i.e. these market shares may differ slightly to those outlined in Section 4 as they are based on retail expenditure, rather than shopping trips).



6.20 As previously highlighted, this study has involved the completion of 1,250 household telephone interviews within St. Helens and the wider area. By analysing the results from the survey it has been possible to understand the likely levels of overall convenience goods expenditure that are captured by facilities within St. Helens. The market shares for the various expenditure categories are highlighted in Tables 6.7 and 6.8.

Table 6.7: St. Helens Borough Current Market Share (2017) – Convenience Goods

Zone	St. Helens Total			
	Main Food	Top Up Food	Total Convenience £m	Market Share ¹ %
1	102.7	45.4	148.1	96.2%
2	83.2	37.7	120.9	62.2%
3	21.5	10.2	31.7	66.4%
4	9.0	3.5	12.5	7.8%
5	24.1	10.0	34.1	31.9%
6	43.4	21.0	64.4	81.8%
St. Helens Total	283.9	127.7	411.6	55.5%

Notes: Derived from Tables 2 and 4 at Appendix 8

¹Market share of total study area expenditure on main and top-up food shopping.

6.24 Table 6.7 indicates that existing facilities within St. Helens attract £283.9m of main food convenience goods expenditure and £127.7m of 'top-up' convenience goods expenditure generated by residents of the Study Area at 2017. Accordingly, facilities within St. Helens Borough retain a total of £411.6m, or 55.5% of the total convenience goods expenditure generated by residents within the Study Area.

6.25 In terms of individual stores within St. Helens, the out-of-centre Asda is identified to be the most popular foodstore which achieves a total convenience goods turnover of £66.6m at 2017. This is followed by the out-of-centre Morrisons store at Baxters Lane and the Morrisons store at Boundary Road, which achieve respective total convenience goods turnovers of £36.1m and £35.6m from the resident population within the Study Area at 2017. Other popular stores include the Tesco Extra at Linkway (which claims £34.4m of Study Area convenience goods expenditure at 2017), the Aldi at Branch Way (£26.1m) and the Aldi at Linkway (£21.5m).

6.26 Table 6.8 below identifies the comparison goods Study Area expenditure claimed by facilities in St. Helens for each zone and for each comparison goods sub-sector. Overall, existing facilities within St. Helens attract £441.6m of the total comparison goods expenditure generated by residents of the Study Area, equating to an overall market share of 44.4%.



Table 6.8: St. Helens Borough Current Market Share (2017) – Comparison Goods

333Zone	St. Helens Total									
	Non-Bulky					Bulky			Total Comparison	Market Share ¹
	Clothing & Footwear	Books/CDs/DVDs	Small Household	Recreation	Chemist	Electrical	DIY & Gardening	Furniture		
	£m	£m	£m	£m	£m	£m	£m	£m	£m	%
1	27.1	6.1	13.7	22.5	24.9	20.4	12.5	9.4	136.6	72.9%
2	34.8	3.8	16.5	22.6	25.3	25.7	13.3	9.3	151.3	57.3%
3	4.1	1.0	3.3	2.1	7.1	4.3	3.1	0.8	25.8	42.0%
4	4.0	0.1	0.9	2.9	1.5	2.5	0.3	0.5	12.7	5.7%
5	8.6	1.3	4.7	8.1	4.7	9.8	4.8	5.1	47.1	31.8%
6	9.4	1.7	5.5	12.6	13.3	11.6	8.0	5.7	67.8	60.2%
Total	88.0	14.0	44.7	70.9	76.9	74.4	42.0	30.7	441.6	44.4%

Notes: Sourced from Tables 9, 11, 13, 15, 17, 19, 21 and 23 to 25 at Appendix 8

Market share of total study area expenditure across all categories on comparison goods

6.27 The most popular destination for spending on comparison goods in the Borough is St. Helens town centre, which attracts £204.3m of Study Area residents' spending (equating to a market share based on available expenditure of 20.5%). In terms of other key retail venues:

- Ravenhead Retail Park attracts £109.9m of comparison expenditure, equating to a 11.1% comparison goods market share of available expenditure;
- St. Helens Retail Park attracts £66.9m of comparison expenditure, equating to a 6.7% market share of available expenditure; and
- Earlestown town centre attracts £13.5m of available expenditure, equating to a 1.4% market share of available expenditure.

6.28 Table 6.9 below compares the 2017 performance of the key retail destinations with the 2011 performance of the same venues, as identified by the previous Retail and Town Centres Uses Study which was published in January 2012 (the 2011 figures have been converted to a 2016 price base). The table identifies that the market share of Study Area comparison goods expenditure claimed by St. Helens town centre has decreased from 28.2% in 2011 to 20.5% in 2017. However, the market share claimed by both Ravenhead and St. Helens Retail Parks has increased significantly.



Table 6.9: Principal Comparison Destinations by Total Comparison Expenditure

Destination	2011 (£m)	% of Total Study Area Comparison Expenditure	2017 (£m)	% of Total Study Area Comparison Expenditure
St. Helens town centre	£258.5m	28.2%	£204.3m	20.5%
Ravenhead Retail Park, St. Helens	£70.0m	7.6%	£109.9m	11.1%
St. Helens Retail Park, St. Helens	£25.7m	2.8%	£66.9m	6.7%
Earlestown town centre	£10.3m	2.1%	£13.5m	1.4%

Notes: 2011 Expenditure figures converted to 2016 Price Base using Appendix 4b of the Experian Retail Planner Briefing Note 15

- 6.29 In terms of comparison facilities outside of St. Helens Borough but within the Study Area, Gemini Retail Park in Warrington attracts £55.6m of the available expenditure and Prescot town centre attracts £30.4m.
- 6.30 Looking at facilities outside of the Study Area, Warrington town centre attracts £146.8m of the available expenditure within the Study Area, or 14.8% of the market share based on available expenditure and a further £66.0m is being attracted by Liverpool city centre, or 6.6% of the market share.



7.0 Retail Capacity in St. Helens Authority Area

- 7.01 We have examined the need for new convenience and comparison goods floorspace over the five year reporting periods working back from 2033 (i.e. at 2017, 2018, 2023, 2028 and 2033).
- 7.02 At the outset, it is important to note that an assessment in the long term should be viewed with caution, due to the obvious difficulties inherent in predicting the performance of the economy and shopping habits over time. In any event, any identified capacity should not necessarily be viewed as justification of new retail floorspace outside of centres as this could prejudice the implementation of any emerging town centre redevelopment strategies and the development of more central sites which may be currently available or which could become available over time.
- 7.03 A complete series of quantitative capacity tables are provided at Appendix 8 which provide further detail in terms of the step-by-step application of our quantitative assessment methodology.

Capacity Formula

- 7.04 For all types of capacity assessment, the conceptual approach is identical, although the data sources and assumptions may differ. The key relationship is Expenditure (£m) (allowing for population change and retail growth) *less* Turnover (£m) (allowing for improved 'productivity') *equals* Surplus or Deficit (£m).
- 7.05 **Expenditure (£m)** – The expenditure element of the above equation is calculated by taking the population within the defined catchment and then multiplying this figure by the average annual expenditure levels for various forms of retail spending per annum. The expenditure is estimated with reference to a number of factors, namely:
- Growth in population;
 - Growth in expenditure per person per annum; and
 - Special Forms of Trading (e.g. internet shopping, catalogue shopping and so on).
- 7.06 **Turnover (£m)** – The turnover figure relates to the annual turnover generated by existing retail facilities within the Study Area. The turnover of existing facilities is calculated using Mintel Retail Rankings and Verdict UK Grocery Retailers reports – independent analysis which lists the sales densities for all major multiple retailers.



- 7.07 **Surplus/Deficit (£m)** – This represents the difference between the expenditure and turnover figures outlined above. A surplus figure represents an effective under provision of retail facilities within the Study Area (which, all things being equal, would suggest that additional floorspace could be supported), whereas a deficit would suggest a quantitative overprovision of retail facilities.
- 7.08 Although a surplus figure is presented in monetary terms, it is possible to convert this figure to provide an indication of the quantum of floorspace which may be required. The level of floorspace will vary dependent on the type of retailer proposed and the type of goods traded. 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 tending to have a much higher sales density than those selling DIY or furniture goods.

Capacity for Future Convenience Goods Floorspace in St. Helens

Trading Performance of Existing Convenience Provision

- 7.09 In order to ascertain the likely need for additional convenience goods floorspace in St. Helens, it is first necessary to consider the performance of the current provision. Given the geography of the authority area and the reasonably strong retention of convenience goods expenditure, it is assumed that the future convenience goods expenditure available to St. Helens will be commensurate with its current market share.
- 7.10 The 'benchmark' (i.e. expected) turnover differs for each operator based on its average turnover per square metre throughout the country. Although robust up-to-date information is available in terms of the convenience goods floorspace provided by large foodstores, it can be more difficult to quantify the extent of local convenience provision as there is no single comprehensive database to rely upon.
- 7.11 Where we have been unable to verify the exact quantum of floorspace provided by existing smaller-scale convenience destinations, we have assumed that stores are trading 'at equilibrium' (i.e. the 'survey-derived' turnover equates to the expected level of turnover).
- 7.12 Table 7.1 below sets out the survey-derived turnover of all convenience goods floorspace within St. Helens Borough. The full list of convenience goods stores in St. Helens Borough and their survey-derived turnovers are set out at Table 5 of Appendix 8. For each destination, the survey-derived turnover is compared to a 'benchmark' turnover which indicates the level of turnover that the store



would generally be expected to attract, based on company average trading levels. A judgement can then be made on the trading performance of existing facilities based on the comparison of the survey-derived turnover with the expected turnover (based on nationally published trading information from Mintel and Verdict) of existing provision.



Table 7.1: Trading Performance of Current Foodstores

DESTINATION	NET SALES ¹ (sq.m)	NET CONVENIENCE SALES AREA ² (sq.m)	SALES DENSITY ³ (£ per sq.m)	BENCHMARK TURNOVER ⁴ (£m)	SURVEY TURNOVER ⁵ (£m)
Zone 1					
Iceland, Ormskirk Street, St Helens	913	847	7,214	6.1	3.3
M&S Foodhall, Church Street, St Helens	1,347	1,180	11,283	13.3	8.8
Aldi, A58 Linkway, St Helens	847	678	12,845	8.7	21.5
Lidl, King Street, St Helens	1,226	981	4,245	4.2	8.7
Tesco Extra, St Helens Linkway, St Helens	8,446	4,223	12,221	51.6	34.4
Aldi, St Helens Retail Park	580	464	12,845	6.0	10.7
Asda Superstore, Kirkland Street, St Helens	4,515	2,425	13,897	33.7	66.6
Morrisons, Boundary Road, St Helens	3,612	2,695	12,369	33.3	36.1
Iceland, St Helens Retail Park, St Helens	402	373	7,214	2.7	4.4
Co-op, Ashtons Green Drive, St Helens	256	225	10,298	2.3	0.4
Co-op, Cambridge Road, St Helens	103	90	10,298	0.9	0.3
Co-op, Elephant Lane, St Helens	391	343	10,298	3.5	2.8
Co-op, Elton Head Road, St Helens	-	-	-	1.5	1.5
Co-op, Fleet Lane, St Helens	256	225	10,298	2.3	0.3
Co-op, Higher Parr Street, St Helens	175	154	10,298	1.6	1.1
Co-op, Millbrook Lane, St Helens	183	161	10,298	1.7	0.6
Co-op, Parr Stocks Road, St Helens	167	147	10,298	1.5	0.7
Co-op, Peckers Hill Road, St Helens	298	262	10,298	2.7	0.6
Co-op, Prescott Road, St Helens	103	90	10,298	0.9	0.3
Co-op, Sutton Park Drive, St Helens	178	156	10,298	1.6	0.9
Tesco Metro, Four Acre Lane, St Helens	1,580	1,033	12,221	12.6	6.6
Aldi, Clock Face Road, St Helens	1,016	813	12,845	10.4	19.9
Morrisons, Baxters Lane, St Helens	3,767	2,810	12,369	34.8	35.6
Other, Zone 1	-	-	-	24.8	21.5
Zone 2					
Aldi, Branch Way, St Helens	749	599	12,845	7.7	26.1
Co-op, Chain Lane, St Helens	433	380	10,298	3.9	4.8
Co-op, West End Road, St Helens	142	125	10,298	1.3	2.7
Iceland, Branchway, St Helens	413	383	7,214	2.8	7.1
Tesco Express, Vicarage Road, St Helens	227	148	12,221	1.8	9.4
Tesco, Bellerophon Way, St Helens	3,697	2,418	12,221	29.5	19.6
Other, Zone 2	-	-	-	10.2	10.2
Zone 3					
Tesco, Earle Street, Newton-le-Willows	1,807	1,182	12,221	14.4	19.9
Heron Frozen Foods, Newton-le-Willows	502	477	6,710	3.2	0.8
Co-op, Newton-le-willows	184	162	10,298	1.7	0.7
Other, Zone 3	-	-	-	4.1	4.1
Zone 5					
Local Shops, Rainhill District Centre	-	-	-	5.1	5.1
Co-op, Warrington Road, Rainhill	501	440	10,298	4.5	1.3
Zone 6					
Co-op, Church Road, St Helens	269	236	10,298	2.4	2.6
Sainsburys Local, Millfields, St Helens	221	154	12,641	1.9	1.6
Tesco Express, East Lancashire Road, St Helens	227	148	12,221	1.8	2.7
Other, Zone 6	-	-	-	4.0	4.0
ST HELENS SUB-TOTAL	-	-	-	363.2	404.4

¹ Gross and net floorspace generally derived from Storepoint database of grocery retailers, unless more specific information available

² Proportion of net floorspace generally derived from typical company split between convenience and comparison floorspace estimated by Verdict for 2017. Aldi and Lidl are assumed to have 80% of net sales dedicated to convenience goods

³ Sales densities relate to the monetary turnover of each square metre of net sales area and are derived from Verdict's 2017 estimate or Mintel Retail Rankings

⁴ It has been assumed that unnamed convenience stores within a centre and independent stores are 'trading at equilibrium' (i.e. their 'benchmark' turnover)

⁵ The survey estimate turnovers have been taken from Table 4 of Appendix 8 and are the main and top-up turnovers combined At 2016 prices



Baseline Quantitative Need for Additional Convenience Goods Floorspace

7.13 Table 7.2 appraises the future capacity for additional convenience goods retail floorspace in St. Helens, taking account of the current convenience goods trading position compared against the 'benchmark' (or anticipated) turnover of existing convenience goods floorspace. Accordingly, Table 7.2 sets out the benchmark turnover of existing convenience retail facilities in St. Helens at base year 2017 and projects this forward to 2033 assuming that the benchmark turnover of existing floorspace will increase through improvements in floorspace efficiency at the rates set out in Experian Retail Planner Briefing Note 15. Floorspace efficiency is the percentage by which a retail sales density is expected to increase annually in real terms over a stated period due to continuing trends towards more modern, higher density stores and the demolition of older inefficient space. Even in areas where new floorspace is not being provided for and the level of floorspace remains broadly consistent, sales are still increasing and as such, so are sales densities.

7.14 The £411.7m of convenience goods expenditure generated by residents of the Study Area and claimed by destinations within St. Helens Borough at 2017 equates to a market share of 55.5%. Our assessment assumes that the current market share of facilities in St. Helens of 55.5% is maintained over the reporting period to 2033. Rolling forward this market share, we estimate that the total available convenience goods expenditure in St. Helens will be £409.5m at 2018, increasing to £415.2m at 2023, £421.7m at 2028 and £427.6m at 2033.

Table 7.2: Quantitative Need for Convenience Goods Floorspace in St. Helens Administrative Area

Year	Benchmark Turnover (£m) ¹	Available Expenditure (£m) ²	Surplus Expenditure (£m)
2017	363.2	411.7	48.5
2018	362.8	409.5	46.7
2023	362.1	415.2	47.4
2028	363.5	421.7	51.7
2033	365.4	427.6	62.2

Source: Table 6a of Appendix 8

¹ Benchmark turnover to increase in line with improvements in turnover efficiency set out in Table 4a of Experian Retail Planner 15 (December 2017)

² Assumes constant market share of Study Area expenditure (55.5%) claimed by facilities in St. Helens administrative area 2016 Prices

Commitments for Additional Convenience Goods Floorspace

7.15 There are a number of commitments for new convenience goods floorspace in St. Helens which will act to reduce the available convenience goods surplus. As summarised in Table 7.3 below, we estimate that the turnover requirements of the extant retail planning permissions for new convenience goods floorspace would be £48.6 at the base year 2017. Full details of the assumptions made in



estimating the turnover of commitments are provided in the notes which accompany Table 6d of Appendix 8.

Table 7.3: Extant Convenience Commitments within the St. Helens Administrative Area

Proposal	Planning Application Reference	Location	Net Conv Sales (sq.m)	Conv Sales Density (£ per sq.m)	Estimated T/O at 2017 (£m)
Former Vulcan Works - Erection of Class A1 Store and Associated works	P/2015/0297	Former Vulcan Works Wargrave Road, Newton Le Willows	1,003	12,845	12.9
Demolition of existing public house and erection of new detached building to provide a convenience store (Class A1 retail) and a small retail unit (Use Class A1) together with access, parking, servicing, and associated works.	P/2015/0344	The Boars Head 675 Elton Head Road St Helens	332	10,298	3.4
Hybrid application for residential and mixed-use development (includes 200 sq.m convenience unit)	P/2015/0130	Penlake Industrial Estate Land Emr Recycling Frmr British Rail Club, Reginald Rd	160	10,298	1.6
Change of use of existing doctors surgery to form 3 no. retail units with new shop frontages.	P/2015/0675	Park House 55 Higher Parr Street St Helens WA9 1AD	186	7,000	1.3
Demolition of existing building and erection of 3 no. retail units and a cafe / restaurant, plus associated parking.	P/2015/0204	449-453 Prescott Road, St Helens	451	7,000	3.2
Demolition of existing carwash and printers, and erection of foodstore, access, car parking, servicing, landscaping plus associated works including re-siting of existing sub station.	P/2016/0175	Pentagon Printing Co Ltd Park Road St Helens WA11 9AZ	1,138	4,245	4.8
Outline application for the erection of a retail food store with associated car parking, access and servicing.(all matters reserved except for access).	P/2016/0182/OUP	Atlas Street, St Helens	1,352	12,845	17.4
Physical works to reconfigure and extend the existing floorspace (creating eight new, retail units), an amendment to the permitted retail use, alterations to the layout of the internal access road and car park and associated works	P/2016/0799/FUL	St Helens Retail Park, Peasley Cross Lane	496	-	4.0
Total	-	-	5,118	-	48.6

Source: Table 6d of Appendix 8
2016 Prices



7.16 Table 7.4 below takes account of the identified extant commitments providing for additional convenience floorspace in the Borough. The estimated turnover of the commitments is deducted from the expenditure surplus identified in Table 7.2 above. The residual expenditure identified when taking account of the turnover of commitments is then converted into a floorspace requirement using average sales densities of £8,000 per sq.m and £12,542 per sq.m at 2017, dependent on the nature of the convenience operator. The lower sales density is an average of the two principal discount foodstore operators (Aldi and Lidl) and the higher sales density is an average of the 'main four' foodstore operators (Asda, Morrisons, Sainsbury's and Tesco). The application of the two sales density figures provides a floorspace range, which gives an idea as to how the identified quantitative need could be met in practice.

7.17 Table 7.4 demonstrates that, in the short, medium and long term, there is very limited identified capacity for additional convenience goods floorspace within the Borough, equating to between 1,100 and 1,700 sq.m by 2033 but these longer-term forecasts should be treated with caution.

Table 7.4: Quantitative Need for Convenience Goods Floorspace in St. Helens Administrative Area After Account is Made for Commitments

Year	Convenience Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus (£m)	Commitments (£m)	Residual (£m)	Min ^{1*}	Max ^{2*}
2017	48.5	48.6	-0.1	0	0
2018	46.7	48.6	-1.9	-100	-200
2023	47.4	48.5	-1.0	-100	-100
2028	51.7	48.7	3.0	200	400
2033	62.2	48.9	13.3	1,100	1,700

Source: Table 6c of Appendix 8

¹ Average sales density assumed to be £12,542 per sq.m at 2017 (based on the average sales density of the leading four supermarket operators as identified by Verdict 2017)

² Average sales density assumed to be £8,000 per sq.m at 2017 (based on the average sales density of discount food retailers) 2016 Prices

Capacity for Future Comparison Goods Floorspace in St. Helens – Based on Continuation of Current Market Share

7.18 Turning to comparison goods capacity, it is first important to note that our methodology deviates from that which has been deployed in respect of convenience goods for two principal reasons. Firstly, it can be extremely difficult to attribute an appropriate benchmark turnover to existing comparison goods provision. Secondly, there tends to be greater disparity between the trading performance of apparently similar comparison goods provision depending on its location, the character of the area and



the nature of the catchment. Consequently, we adopt the approach with comparison goods floorspace that it is trading 'at equilibrium' at base year 2017 (i.e. our survey derived turnover estimate effectively acts as benchmark).

7.19 We assume that there is therefore a nil quantitative need for any additional floorspace across the St. Helens local authority area at 2017. Once again, we also assume that the future performance of St. Helens' comparison goods facilities will be commensurate with their current market share.

Baseline Quantitative Need for Additional Comparison Goods Floorspace

7.20 On this basis and given that the household survey identifies that St. Helens Borough claims a 44.4% market share of comparison goods expenditure, we estimate that £441.5m of comparison goods expenditure is claimed by comparison goods floorspace within the Borough at 2017. Our assessment 'rolls forward' the identified market share to examine the likely level of comparison goods floorspace required to maintain the role and function of the retail facilities in St. Helens going forward.

7.21 Given the forecast increases in comparison goods expenditure and population and allowing for year on year increases in the productivity of existing floorspace, we estimate that by 2023 there will be an expenditure surplus of £16.1m to support additional comparison goods floorspace within the Borough. As set out below at Table 7.7, this surplus is forecast to then increase sharply to £53.4m at 2028 and to £102.9m at 2033.

Table 7.7: Quantitative Need for Comparison Goods Floorspace in St. Helens Administrative Area

Year	Turnover of Existing Stores (£m) ¹	Available Expenditure (£m) ²	Surplus Expenditure (£m)
2017	441.5	441.5	0.0
2018	445.5	443.6	-1.9
2023	496.7	512.8	16.1
2028	554.3	607.7	53.4
2033	618.0	720.9	102.9

Source: Table 26A of Appendix 8

¹ Benchmark turnover to increase in line with improvements in turnover efficiency set out in Table 4b of Experian Retail Planner 15 (December 2017)

² Assumes constant market share (44.4%) claimed by facilities within the Study Area 2016 Prices



Commitments for Additional Comparison Goods Floorspace

7.22 The above Table 7.7 does not take into account existing commitments from within the Borough. As indicated by Table 7.8 below, we estimate that these commitments will have a combined benchmark turnover of £27.6m if they were assumed to be operational at 2017.

Table 7.8: Extant Comparison Commitments within the St. Helens Administrative Area

Location	Planning Application Reference	Proposal	Net Comp Sales (sq.m)	Comp Sales Density (£ per sq.m)	Estimated T/O at 2017 (£m)
Linkway West	P/2013/0730	Mixed use development comprising class A1 retail uses, and/or class A3 retail uses, and/or class D2 leisure uses, car parking, landscaping, access arrangements and associated works.	2,692	5,000	13.46
449-453 Prescot Road St Helens	P/2015/0204	Demolition of existing building and erection of 3 no. retail units and a cafe / restaurant, plus associated parking.	243	4,000	0.97
Former Vulcan Works Wargrave Road, Newton Le Willows	P/2015/0297	Former Vulcan Works - Erection of Class A1 Store and Associated works (new Local Centre)	250	4,000	1.00
Park House 55 Higher Parr Street St Helens WA9 1AD	P/2015/0675	Change of use of existing doctors surgery to form 3 no. retail units with with new shop frontages.	186	4,000	0.74
Unit 11, Ravenhead Retail Park, Milverny Way	P/2016/0773/ FUL	Sub division of unit 11 (Currys) into 4no units, including 4no shopfronts and 4no mezzanine floors.	2,363	3,622	8.56
Pentagon Printing Co Ltd Park Road St Helens WA11 9AZ	P/2016/0175	Demolition of existing carwash and printers, and erection of foodstore, access, car parking, servicing, landscaping plus associated works including re-siting of existing sub station.	285	4,000	1.14
Atlas Street, St Helens	P/2016/0182/ OUP	Outline application for the erection of a retail food store with associated car parking, access and servicing.(all matters reserved except for access).	338	5,206	1.76
Total	-	-	6,357	-	27.63

Source: Table 26d of Appendix 8
2016 Prices



7.23 Based on the above, Table 7.9 below provides a summary of the estimated residual comparison goods expenditure after commitments are accounted for. At 2017, this equates to a -£27.6m deficit which reduces slightly to -£15.0m at 2023. However, by 2028 we estimate that there will be an expenditure surplus of £18.7m, increasing to £64.2m at 2033.

7.24 Table 7.9 translates the identified residual expenditure figures into floorspace requirements, using a minimum average sales density of £3,000 per sq.m and a maximum of £5,000 per sq.m. We consider the lower figure to be representative of what could be achieved in a smaller centre and the higher figure to be representative of the sales density that could be secured by additional comparison goods floorspace in or around St. Helens town centre.

7.25 At 2028, we estimate that there is a comparison floorspace requirement of between 3,000 and 6,200 sq.m, increasing to a requirement for between 9,200 sq.m and 21,200 sq.m at 2033. Whilst these longer term forecasts should be treated with caution, the figures do demonstrate that within the medium to long term, there is a significant capacity for additional comparison floorspace within the Borough.

Table 7.9: Quantitative Need for Comparison Goods Floorspace in St. Helens Administrative Area After Account is Made for Commitments

Year	Comparison Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus	Extant	Residual	Min ^{1*}	Max ^{2*}
2017	0.0	27.6	-27.6	-5,500	-9,200
2018	-1.9	27.9	-29.8	-5,900	-9,800
2023	16.1	31.1	-15.0	-2,700	-4,900
2028	53.4	34.7	18.7	3,000	6,200
2033	102.9	38.7	64.2	9,200	21,200

Source: Table 26c of Appendix 8

¹ Average sales density assumed to be £5,000 per sq.m at 2017, which we consider to be towards the higher end of what could be achieved 'in centre' in the Study Area

² Average sales density assumed to be £3,000 per sq.m at 2017, which we consider to be towards the lower end of what could be achieved in the Study Area
2016 Prices

Summary

7.26 Our analysis of the current trading performance of the retail destinations within the Study Area, coupled with an assessment of the expected level of population and expenditure growth over the next 16 years, demonstrates that, in the short to long term, there is no quantitative requirement for any



additional convenience goods floorspace within the Borough. By 2033, there is a limited capacity for additional convenience floorspace which could be absorbed by small format stores or one discount operator, but these figures should be viewed with caution and are likely to be absorbed by incremental small format convenience developments over the plan period within the Borough.

- 7.27 Turning to the capacity for additional comparison floorspace within the Borough, we believe that there will be a requirement for additional floorspace from 2028 onwards. Whilst we estimate that this requirement will correspond to a need for between 9,200 sq.m and 21,200 sq.m at 2033, we once again reiterate that long term estimates should be viewed with caution due to the difficulties in predicting the economy's performance over time.
- 7.28 In addition, in considering the identified need, it is relevant to note the weakening of the town centre's comparison goods market share in recent years. Accordingly, in line with 'town centre first' principles, it will be important to try and accommodate much of this additional floorspace within St. Helens town centre.



8.0 Commercial Leisure

- 8.01 Our approach to the assessment of quantitative need in the leisure market necessarily departs from our retail methodology for a number of reasons, including the fragmentation of the market and the limited availability of accurate data. However, the household survey undertaken to inform the Study asked respondents questions about their use of commercial leisure facilities and, through reference to market share, we are therefore able to form a view as how St. Helens currently meets the needs of their population in relation to the bingo, cinema, ten-pin bowling and health and leisure centre sectors.
- 8.02 We also use national statistics in respect of the typical level of provision of specific types of facilities to assist our judgement in respect of the likely future need for additional facilities in the authority area. By reference to estimated increases in the Study Area population, this 'benchmarking' exercise informs our judgement in respect of the likely future need for additional commercial leisure facilities in the Study Area.
- 8.03 For each leisure sector, we consider the current broad patterns of existing use, before then assessing the quantitative need for additional facilities.

Participation Rates

- 8.04 The Household Survey asked respondents which leisure activities they participate in. Within the Study Area as a whole, the most popular leisure activity mentioned by respondents was visiting restaurants (which 63.8% of respondents visit), followed by pubs/bars (47.1%), visiting the cinema (41.5%) and visiting the theatre/concert halls (37.6%). Only 6.6% of respondents stated that they visit social clubs, while only 5.7% of respondents stated that they participate in bingo.



Table 8.1: Participation Rates

Leisure Activity	Participation Rate
Restaurant	63.8%
Pub / Bars	47.1%
Cinema	41.5%
Theatre / concert hall	37.6%
Museum / art galleries	21.8%
Health & fitness	21.1%
Leisure centre activities	14.6%
Ten pin bowling	13.2%
Nightclub	6.7%
Social club	6.6%
Bingo	5.7%

Question 36 of Household Survey, Appendix 2

Bingo

- 8.05 The St. Helens administrative area currently accommodates two permanent bingo halls, these being the Mecca Bingo on Moss Lane in St. Helens and the Hippodrome Bingo on Corporation Street in St. Helens. The Mecca Bingo hall appears to be the most popular of the as it attracts 34.7% of bingo trips which originate within the Study Area, which compares to the 12.5% market share claimed by the Hippodrome Bingo.
- 8.07 As Table 8.2 indicates, other facilities within the St. Helens administrative area operate on a more occasional basis in social clubs and pubs. Outside of the Study Area, relatively popular bingo facilities comprise Gala Bingo in Widnes, Club 3000 in Liverpool, Gala Bingo at Cockhedge Shopping Centre in Warrington and Gala Bingo in Wigan, which respectively account for 8.3%, 5.8%, 7.1% and 7.0% of all trips to play bingo that originate from within the Study Area.



Table 8.2: Market Share of Facilities for Bingo Hall Visits (%)

Zone	Address	1	2	3	4	5	6	Total
	Study Area							
1	Mecca, Moss Lane, St. Helens	32.4%	33.3%	17.0%	45.2%	14.6%	76.3%	34.6%
	Opera Bingo, Hippodrome, Corporation Street, St. Helens	31.4%	10.6%	12.9%	5.9%	0.0%	0.0%	12.5%
	Clock Face, St. Helens	0.0%	0.0%	0.0%	0.0%	0.0%	15.6%	1.7%
	St. Helens town centre	9.7%	0.0%	0.0%	0.0%	0.0%	0.0%	2.6%
	Sutton local centre	3.8%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%
2	Ashton-in-Makerfield	0.0%	5.3%	0.0%	0.0%	0.0%	0.0%	1.0%
	Bryn Labour Club, Wigan Road, Wigan	0.0%	5.3%	0.0%	0.0%	0.0%	0.0%	1.0%
3	Earlestown town centre	0.0%	0.0%	15.2%	0.0%	0.0%	0.0%	1.3%
5	Prescot town centre	0.0%	0.0%	0.0%	0.0%	5.8%	0.0%	1.1%
6	Rainhill district centre	3.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%
	Other Authority Areas							
OSA	Gala Bingo, Windmill Centre, Lugsdale Road, Widnes	9.9%	0.0%	0.0%	0.0%	30.0%	0.0%	8.3%
	Other, North West (Halton)	0.0%	0.0%	0.0%	0.0%	5.8%	0.0%	1.1%
	Club 3000, Poplar Bank, Liverpool	0.0%	0.0%	0.0%	0.0%	30.7%	0.0%	5.8%
	Other, North West (Knowsley)	9.9%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%
	Mecca Bingo, Prescot Road, Liverpool	0.0%	0.0%	0.0%	5.9%	13.1%	0.0%	3.5%
	Mecca, Sale	0.0%	0.0%	54.8%	0.0%	0.0%	0.0%	4.8%
	Gala Bingo, Cockhedge Shopping Park, Prince Henry Square, Warrington	0.0%	0.0%	0.0%	42.9%	0.0%	0.0%	7.1%
	BJ's Luxury Bingo, Ellesmere Street, Leigh	0.0%	12.0%	0.0%	0.0%	0.0%	0.0%	2.2%
	Gala Bingo, Anjou Boulevard, Robin Park, Wigan	0.0%	33.6%	0.0%	0.0%	0.0%	8.1%	7.0%

Source: Question 45 of Household Survey, Appendix 2. Includes all responses located within Study Area and those receiving more than 1.0% of total market share of trips outside Study Area.

Note: 'OSA' relates to facilities outside of the Study Area

8.04 The Study Area has a total estimated population of 358,067 at 2017, increasing to 380,728 at 2033. Mintel report¹⁴ that there were 354 bingo halls in the UK at March 2015, which applying the Office for

¹⁴ 'Casinos and Bingo', Mintel, March 2015



National Statistics' estimated population of the UK of 65.1 million (for June 2015)¹⁵, suggests that each hall is supported by a catchment of 183,898 persons or thereabouts. Accordingly, we estimate that, on this basis, the Study Area population could support 2.0 bingo clubs at 2016, increasing to 2.1 bingo clubs at 2033.

- 8.05 In terms of the existing provision in the Study Area, it should be noted that the Mecca bingo hall within St. Helens is relatively big and is purpose built, and that Opera Bingo (at the Hippodrome on Corporation Street) also meets residents' needs. Accordingly, the current provision within St. Helens is considered to be appropriate.
- 8.06 Furthermore, it should also be noted that the bingo market has been significantly affected by the 2007 ban on smoking in enclosed public places, an increase in the proliferation of fixed odd gaming machines, and an increase in online gambling. However, recent reports indicate that the industry has begun to stabilise, supported by the Government halving Bingo Duty from July 2014 and a shift towards a refreshed and younger customer base. Mintel¹⁶ forecasts modest year on year market growth of around 1% over the coming years with consumer expenditure of £690m at 2014 increasing to £728m at 2019.
- 8.07 As a consequence of this, new bingo hall openings are few and far between and we therefore do not consider it likely that there will be any change to current provision in the Study Area in the foreseeable future. Accordingly, we do not consider it necessary to plan for additional provision in the period to 2033, but instead recommend that, should any proposals for such development be forthcoming, they are judged on their own merit in accordance with relevant town centre planning policy at the time of an application's submission.

Table 8.3: Bingo Hall Requirement in Study Area

Year	Study Area Population	Typical Population Required to Support Hall	Potential Number of Clubs Supported by Study Area	Study Area Custom Claimed by St. Helens	Potential Number of Clubs Supported in St. Helens
2017	358,067	183,898	2.0	180,544	1.0
2018	359,725	183,898	2.0	181,286	1.0
2023	368,001	183,898	2.0	184,863	1.0

¹⁵ As identified by the National Population Projections: 2014 based projections, Office for National Statistics, published October 2015

¹⁶ 'Casinos and Bingo', Mintel, March 2015



2028	374,698	183,898	2.0	187,466	1.0
2033	380,728	183,898	2.1	189,763	1.0

Note: Typical population to support a bingo hall derived from the Government's estimation (set out the HM Treasury announcement titled 'Budget bingo tax to create and save hundreds of jobs and revitalise industry' of March 2014) and the Office of National Statistics UK population projection of 65.1 million persons at June 2015

Cinema

- 8.08 As set out below at Table 8.3, the results of the household survey indicate that the Cineworld Cinema on Chalon Way in St. Helens within Zone 1 is the single most popular facility, securing 61.2% of trips to the cinema which originate within the Study Area. This is followed by the Odeon in the Westbrook Centre in Warrington, which attracts 21.6% of trips. Within Zone 1, 89.2% of trips are to the Cineworld on Chalon Way which suggests that it is able to meet most local needs.
- 8.09 Looking outside the Study Area, 3.6% of trips are to the Reel Cinema in Widnes and 3.3% to the Empire Cinema in Wigan. Overall, a total of 14.5% of trips from within the Study Area are to destinations outside of the Study Area.

Table 8.4: Study Area Market Share for Cinema Visits (%)

Zone	Address	1	2	3	4	5	6	Total
	Study Area							
1	Cineworld, Chalon Way, St. Helens	89.2%	71.5%	25.9%	2.3%	69.6%	88.4%	61.2%
	Other Authority Areas							
4	Odeon, Westbrook Centre, Cromwell Avenue, Warrington	4.4%	1.4%	54.1%	84.2%	4.2%	0.0%	21.6%
OSA	Reel Cinemas, Earl Road, Widnes	1.3%	0.6%	0.0%	3.4%	17.7%	0.0%	3.6%
	Odeon, Allerton Road, Liverpool	0.0%	0.0%	0.0%	0.0%	2.3%	7.3%	1.2%
	Odeon, Paradise Street, Liverpool	1.9%	0.5%	2.4%	0.0%	4.1%	0.0%	1.3%
	Odeon, The Printworks, 27 Withy Grove, Manchester	0.0%	0.0%	1.2%	5.3%	0.0%	1.1%	1.2%
	Odeon, 201 The Dome, Trafford Centre, Manchester	0.0%	5.0%	10.3%	1.2%	0.0%	0.0%	2.2%
	Cineworld, Spinning Jenny Way, Leigh	0.0%	5.3%	3.7%	0.0%	0.0%	0.0%	1.6%
	Empire Cinemas, Anjou Boulevard, Robin Park, Wigan	0.4%	12.8%	0.0%	0.0%	0.0%	1.1%	3.3%

Source: Question 38 of Household Survey, Appendix 2. Includes all responses located within Study Area and those receiving more than 1.0% of total market share of trips outside Study Area

Note: 'OSA' relates to facilities outside of the Study Area



- 8.10 The cinema sector has struggled over the last five years with falling admissions. Admissions of 158 million in 2014 represented a decline of 8% from that of 2011¹⁷. However, with the economy improving and a series of high profile releases scheduled, it is expected that the sector will return to growth in 2016. Admissions for 2015 were estimated to be 173 million, forecast to rise to 175 million in 2020 through modest growth¹⁸. In terms of facilities, the number of cinemas in the UK experienced gradual decline between 2010 and 2014 during the economic downturn. However, 2015 saw a return to investment, with the total number of UK cinema sites increasing from 743 at the end of 2014 to 757 in 2015.
- 8.11 Once again, we estimate that the Study Area has a total estimated population of 358,067 at 2017, increasing to 380,728 at 2033. The Mintel Cinema Market report of November 2015 estimates that the UK population on average visits a cinema 2.7 times per annum and that each cinema screen attracts around 42,927 separate admissions.
- 8.12 Based on the estimated population within the Study Area at 2017, we have calculated that the population could support 22.5 screens at 2017, increasing to 23.9 screens at 2033.
- 8.13 There are two cinemas within the Study Area; the Cineworld at Chalon Way in St. Helens has 11 screens and the Odeon at Cromwell Avenue in Warrington has 10 screens. Accordingly, the level of provision throughout the Study Area is in line with expectations. We do not consider there to be a pressing quantitative need for an additional cinema over the forthcoming plan period, and do not consider it necessary to plan for additional provision in the period to 2033. Once more, should any such proposals be forthcoming, they should be judged on their own merit in accordance with relevant town centre planning policy.

Table 8.5: Cinema Screen Requirement in Study Area

Year	Study Area Population	Number of Cinema Visits Per Person	Attendance	Number of Admissions Required to Support Screen	Screens Supported
2017	358,067	2.7	966,781	42,927	22.5
2018	359,725	2.7	971,258	42,927	22.6
2023	368,001	2.7	993,603	42,927	23.1

¹⁷ 'Cinemas', Mintel, November 2014

¹⁸ 'Cinemas', Mintel, November 2015



2028	374,698	2.7	1,011,685	42,927	23.6
2033	380,728	2.7	1,027,966	42,927	23.9

Note: Number of cinema visits per person and trips required to support cinema screen derived from Mintel Cinemas report (November 2015)

Ten Pin Bowling

- 8.14 There is a single ten pin bowling alley within the Study Area, this being the LA Bowl at Chetham Court in Warrington (located in Zone 4, but outside of the St. Helens administrative boundary). Accordingly, there is currently no ten pin bowling facility within the St. Helens administrative area. However, we are aware of the extant planning permission reference P/2016/0377 which provides for a bowling alley (together with retail and food and drink development) at Westpoint off Linkway.
- 8.15 Given the current lack of provision in St. Helens, it is unsurprising that the LA Bowl is the most popular ten pin bowling destination, attracting 37.4% of all bowling trips that originate within the Study Area.
- 8.16 Other ten pin bowling alleys outside of the Study Area which also attract trips from residents from the six zones are the Widnes Superbowl (which secures a Study Area market share of 28.2% of such trips), the AMF Bowling in Wigan (19.7%) and the Hollywood Bowl in Liverpool (7.5%). Overall, a total of 61.3% of trips originating from within the Study Area travel to destinations outside.

Table 8.6: Study Area Market Share for Ten Pin Bowling Visits (%)

Zone	Address	1	2	3	4	5	6	Total
	Other Authority Areas							
4	La Bowl, Chetham Court, Warrington	20.1%	20.4%	80.3%	87.5%	16.8%	23.0%	37.4%
OSA	Widnes Superbowl, The Hive, Earle Road, Widnes	63.2%	11.7%	0.0%	2.4%	47.8%	26.0%	28.2%
	Hollywood Bowl, Edge Lane Retail Park, Liverpool	1.7%	0.0%	0.0%	0.0%	35.4%	19.9%	7.5%
	Premier Bowl, Ocean Plaza, Marine Drive, Southport	4.4%	0.0%	0.0%	0.0%	0.0%	19.9%	4.0%
	Namco Funscape, The Trafford Centre, Trafford	0.0%	0.0%	19.7%	0.0%	0.0%	0.0%	2.0%
	AMF Bowling, Wallgate, Wigan	10.7%	67.9%	0.0%	2.4%	0.0%	11.2%	19.7%

Source: Question 41 of Household Survey, Appendix 2. Includes all responses located within Study Area and those receiving more than 1.0% of total market share of trips outside Study Area

Note: 'OSA' relates to facilities outside of the Study Area



- 8.17 The tenpin bowling sector in general has experienced decline over the last ten years, with a gradual decline in the number of facilities. In the recent short term the market has shown positive signs, with Mintel¹⁹ forecasting modest market growth equivalent to approximately 4% per annum between 2015 and 2018. An alternative business model has recently developed for in-centre 'boutique' bowling facilities, with a greater focus on food and beverage as a fashionable alternative to the traditional family orientated bowling experience. This business model has potential to support the evening economy within towns and cities as an alternative use for struggling night clubs venues, where the market has been found to have contracted in recent years. Participation of tenpin bowling is found to have remained relatively popular amongst both young adults and families. Mintel identifies that 52% of 16 to 24 year olds visited a bowling alley within the last year, with this reducing to 50% of those aged between 25 to 34 and 39% of those aged 35 to 44, with participation levels reducing significantly within older age groups.
- 8.18 In terms of the expected benchmark level of provision, we note that the Mintel Tenpin Bowling report of May 2014 identified that there were 5,617 bowling lanes across the UK in 2014. Given that the UK population at 2014 was approximately 64.6 million²⁰, this equates to one lane for every 11,500 persons. Based on the estimated population within the Study Area at 2017, the level of ten pin lanes which could be support is 31.1 at 2017, rising to 33.1 at 2033. Looking at the proportion of the population within the St. Helens administrative area specifically, we have calculated that the population would support 15.7 lanes at 2017, rising to 16.5 lanes at 2033. The proposed scheme at Westpoint is expected to deliver six bowling lanes if it is delivered. As such, there is still a theoretical deficiency in the number of lanes available within the Borough. However, we do not anticipate that there will be any additional operator interest in the short term (at least until the Westpoint scheme has 'bedded in') and we therefore do not believe that it is necessary for the Council to plan for any further development.

Table 8.7: Ten Pin Bowling Requirement in Study Area

¹⁹ 'Tenpin Bowling', Mintel, May 2014

²⁰ As identified by the Office for National Statistics' Population Estimates for UK, England and Wales, Scotland and Northern Ireland, Mid-2014, June 2015



Year	Study Area Population	Typical Population Required to Support One Ten Pin Lane	Potential Number of Ten Pin Lanes Supported by Study Area	Study Area Custom Claimed by St. Helens	Potential Number of Ten Pin Lanes Supported in St. Helens
2017	358,067	11,500	31.1	180,544	15.7
2018	359,725	11,500	31.3	181,286	15.8
2023	368,001	11,500	32.0	184,863	16.1
2028	374,698	11,500	32.6	187,466	16.3
2033	380,728	11,500	33.1	189,763	16.5

Note: Typical number of persons required to support a bowling lane derived from Mintel Tenpin Bowling report of July 2014

Health and Fitness Centres

- 8.24 In the health and fitness sector, the number of local authority owned leisure centres and swimming pools has generally increased in the past few years, although with reductions to their sport and leisure funding budgets local authorities are increasingly being required to adopt more commercial approaches. Mintel²¹ records that, at June 2015, 33% of adults were found to use a local authority owned health centre or swimming pool. This is a reduction from the figure of 40% recorded in 2013, although operator data suggests that admissions have remained resilient overall, pointing to losses being concentrated around more casual users (who visit less often). The replacement of aging facilities to allow local authority facilities to continue to compete with private facilities remains a key challenge.
- 8.25 Research by the Leisure Database Company²² indicates that the private health and fitness sector had a market value of approximately £3.9 billion in March 2012, an increase of 1.5% over the previous twelve month period. Mintel²³ also notes that, whilst only 12% of adults currently use a private health and fitness club, the potential for a further expansion of the market remains strong. Perhaps unsurprisingly the 16 to 24 and 25 to 34 age groups have the highest participation rates, with 19% and 18% respectively of the population within these age groups visiting private health clubs, with participation dropping off quickly within older age groups.

²¹ 'Leisure Centres and Swimming Pools', Mintel, September 2015

²² 'State of the UK Fitness Industry', The Leisure Database Company, June 2013

²³ 'Health and Fitness Clubs', Mintel, July 2015



- 8.26 The composition of the private health and fitness sector has experienced great change in recent years with the rise of budget gym operators presenting a challenge to the more long established key players. Mintel¹² indicates that the market has expanded significantly with a shift towards budget operators bringing possibilities for more convenient access and affordability for the customers. Budget operator Pure Gym has expanded to become the market leader both in terms of number of members (520,000) and clubs (99), more than doubling the size of its estate between 2012 and 2013. At the same time Pure Gym’s main competitor, The Gym, has also greatly increased its membership (350,000) and number of clubs (63). David Lloyd Leisure and Virgin Active Group remain the largest ‘full service’ health club chains with 440,000 and 400,000 members respectively. Mintel has predicted 6% growth for the private sector health and fitness market up to 2018, to reach a value of £2.8 billion in 2020.
- 8.27 Looking at the household survey data relating to the current preferences in terms of health and fitness centres across the Study Area, Table 8.8 below provides the most popular destinations.

Table 8.8: Principal Health and Fitness Destinations in the Study Area

Zone	Destination	Market Share by Zone						Total
		1	2	3	4	5	6	
	Study Area							
1	Queens Park Health & Fitness, Boundary Road, St. Helens	26.8%	12.4%	0.0%	0.0%	13.8%	23.3%	14.3%
1	Sports Direct, St. Helens	16.4%	8.8%	0.0%	0.0%	3.7%	21.4%	9.3%
1	Xercise4less, Boundary Road, St. Helens	15.1%	5.5%	0.0%	0.0%	0.0%	0.0%	4.9%
1	DW Fitness, Ravenhead Retail Park, St. Helens	3.6%	4.0%	5.5%	1.0%	1.9%	11.0%	4.1%
	Other Authority Areas							
2	Ashton Leisure Centre, Ashton-in-Makerfield	0.0%	16.6%	0.0%	0.0%	0.0%	3.9%	4.8%
4	Orford Jubilee Neighbourhood Hub, Jubilee Way, Warrington	0.0%	2.2%	18.4%	14.0%	0.0%	0.0%	4.3%
4	Pure Gym, Chetham Court, Warrington	0.0%	0.0%	22.0%	12.2%	0.0%	0.0%	3.6%

- 8.28 Table 8.8 above demonstrates that the Queens Park Health and Fitness Club, located on Boundary Road in Zone 1, is the most popular destination across the whole Study Area for health and fitness visits. A total of 14.3% of all respondents throughout the Study Area who stated that they visited a health and fitness club confirmed that this was the destination that they visited last. Zones 1 and 6 have the highest proportion of respondents who visited this facility last, with Queens Park Health & Fitness securing respective market shares of 26.8% and 23.3% in these zones. The Sports Direct in St. Helens town centre is the second most popular health and fitness venue, securing a 9.3% overall market share.



- 8.29 Overall, the proportion of the market share retained within the Study Area is 73.9%, with approximately 58.3% of such trips being directed towards facilities within the St. Helens administrative boundary. Facilities within Zone 1 attract 46.3% of the market share overall.
- 8.30 There is a good provision of health and fitness clubs across the administrative area, with a range of national multiples and independent operators. From an audit of available facilities, it appears that provision is appropriately distributed throughout St Helens' key settlements and, as such, St Helens appears to be relatively well provided for in terms of indoor health and fitness facilities.
- 8.31 Accordingly, whilst there does not appear to be a pressing need to allocate additional land for such leisure uses, it is considered that proposals for new indoor sports, health and fitness provision should be considered positively, provided that they are in accordance with the provisions of the development plan and national planning policy.

Food and Drink

- 8.32 Consumer spending on eating out through visits to restaurants and takeaways is recognised as a sector which has performed well during the economic downturn. Mintel²⁴ identifies that the eating out market grew by around 9% between 2013 and 2015, to an estimated £34 billion, and predict that the market will continue to experience growth, estimated at approximately 17% in the period up to 2019, buoyed by improved consumer confidence and increased participation at takeaway outlets such as coffee shops. The emergence into the restaurant market of multiple new specialist operators, many with significant plans for expansion has increased opportunities for landlords to provide a diverse and distinct food offer. Established chains with a strong identity such as Wagamama, YO! Sushi and Byron are all examples who have recently significantly expanded their presence (Wagamama opened 21 new restaurants between 2013 and 2015, Byron opened 20 and YO! Sushi opened 12).
- 8.33 A recent report by Savills²⁵ entitled 'Casual Dining in the UK' has found that casual dining brands in the UK, which operate from under 25 sites, such as Wahaca and Cau, have grown by 39% over the past three years. The report identifies that such dining brands, in combination, have opened 489 new

²⁴ 'Eating Out Review', Mintel, June 2015

²⁵ Casual Dining in the UK, Savills, June 2016



outlets across the UK. This emphasises the popularity and growth of smaller chains, a trend which has led to increased diversity and consumer choice across the sector. During the same time period brands providing a larger number of outlets such as Pizza Express, Prezzo and Nandos, have grown by 13%. In terms of the casual dining market as a whole, Savills identifies that 80% is made up of brands with fewer than 25 restaurants. The Savills report also identifies that there has been growth in different cuisines, with North American, Caribbean and Thai cuisines increasing in popularity.

- 8.34 Within the public house (licensed) sector, despite significant pub closures in recent years, there is reason for optimism within this sector. The introduction of a market rent-only option for many tenants in 'tied' agreements with the large pub companies looks set to lead to significant change²⁶. Visitor numbers have been found to be stable, with the industry expected to experience modest growth in the period to 2019. Mintel identify that some 64% of adults visited a pub or bar in 2014/15 for a drink, with the 18 to 24 age group found to be most likely to drink in pubs or bars on a weekly basis. The cask ale market in particular is reported to have grown by 29% since 2010²⁷. Nevertheless, a quality food offer has become increasingly important within the sector, as the contribution which food sales makes to pub revenues has increased steadily over a prolonged period.
- 8.35 In terms of those respondents to the household survey who undertake restaurant visits, the most popular destination for such trips is St. Helens town centre which attracts 25.1% of the market share from residents residing in the Study Area. Within Zone 1, 47.5% of residents' state that they last visited St. Helens town centre to go to a restaurant, this reduces to 33.6% for Zone 6 residents and 32.5% for Zone 2 residents. Outside of the Study Area, 18.0% of the market share is to facilities in Liverpool city centre, of which Zone 5 has the highest proportion travelling to the city centre, with 42.9% of all trips to restaurants from residents of that zone being directed to Liverpool.
- 8.36 Respondents to the household survey were also asked if they visit bars, pubs and night clubs. The most popular destination for visiting such establishments was St. Helens town centre, which attracts a market share of 26.5% overall.

²⁶ 'Pub Visiting' Mintel, May 2015

²⁷ 'The Cask Report 2015-16', Cask Matters, September 2015



8.37 The existing provision of food and drink establishments within St Helens town centre is relatively good, with both national multiple and independent operators currently present. However, due to proportions of residents' currently travelling to Liverpool city centre we do consider that there is an opportunity to enhance this further with positive planning for such uses, and we believe that there may be potential to accommodate additional food and drink operators in St Helens' centres and that to do so may have some indirect benefits for other operators. Accordingly, we recommend that proposals for such uses be dealt with in a positive and proactive manner (considering town centre policy requirements).

Summary

8.38 Within St. Helens Borough, there is a limited requirement for additional commercial leisure facilities based on our assessment. In terms of bingo halls and cinema screens we believe there to be limited requirement for any additional facilities within the Borough. Whilst there is a clear demand for a new ten-pin bowling facility (due to the lack of any such facility within the Borough), we note the existing planning permission at Westpoint will provide a ten-pin bowling alley and we consider it unlikely that there will be further demand from operators, at least in the short term.

8.39 Looking at the current facilities within the town centre and the responses from the in-street surveys as summarised in Section 4 above, we believe that there may be a requirement for additional restaurant facilities within the Borough and particularly within St. Helens town centre. Again, Westpoint will go some way to delivering such facilities, but we recommend that opportunities to bring forward additional quality food and drink uses within the town centre (to provide for its diversification and future vitality and viability) are investigated.

9.0 Key Findings and Recommendations

Introduction

- 9.01 Paragraph 23 of the NPPF requires local planning authorities to promote competitive town centres by, *inter alia*:
- recognising town centres as the heart of their communities and by pursuing policies to support their vitality and viability;
 - defining a network and hierarchy of centres that is resilient to anticipated future economic changes;
 - promoting competitive town centres that provide customer choice and a diverse retail offer;
 - retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive; and
 - undertake an assessment of the need to expand town centres.
- 9.02 Each of the above requirements is considered below in relation to the St. Helens administrative area in the context provided by this Study. Our recommendations in respect of St. Helens' future retail and town centre strategy seek to address the requirements set out in the original Retail and Leisure Study Tender Brief of February 2016.

Summary of Identified Need and Recommendations in Respect of the Council's Future Retail and Town Centre Strategy

- 9.03 The household survey, undertaken in July 2016, identified that St. Helens Borough claims a market share of 55.5% of convenience goods expenditure and 44.4% of comparison goods expenditure which originates within the Study Area at 2017.
- 9.04 The floorspace requirements identified in this Study – which are summarised below – are of some relevance to the determination of future planning applications for new retail floorspace in the Borough.
- 9.05 However, whilst any level of identified quantitative need has some relationship to the test of impact, it is necessary to be mindful that 'need' is no longer a direct planning test. Accordingly, identified floorspace requirements should not be considered a 'cap' on appropriately located development.



Instead, proposals that come forward should be assessed against the relevant policies of the NPPF and the development plan.

Convenience Goods Floorspace Requirement

9.06 In terms of convenience goods, based on the retention of St. Helens’ existing convenience goods market share of 55.5% in the period to 2033, in the short, medium and long term, there is very limited identified capacity for additional convenience goods floorspace within the Borough. By 2033, we identify a capacity for between 1,100 and 1,700 sq.m of additional convenience floorspace, but these longer term forecasts should be viewed with caution and are likely to be absorbed by incremental developments across the Borough over the plan period in any event.

Table 9.1: Quantitative Need for Convenience Goods Floorspace in St. Helens Borough

	2018 (sq.m)	2023 (sq.m)	2028 (sq.m)	2033 (sq.m)
Minimum Convenience Goods Requirement	-800	-100	200	1,100
Maximum Convenience Goods Requirement	-1,600	-200	400	1,700

9.07 In terms of the spatial distribution of foodstores across the Borough, we do not consider that there are any significant gaps in provision which need to be responded to, as the existing foodstores are reasonably well distributed across the Borough. There is a reasonable representation from different fascias across the Borough, including from each of the ‘main four’ supermarkets, discount retailers and higher end foodstores. However, it is evident that discount foodstore are trading particularly strongly and we anticipate that further interest from this sector may be forthcoming in the future.

Comparison Goods Floorspace Requirement

9.08 In terms of comparison goods, we identify a requirement for between 3,000 sq.m and 6,200 sq.m of additional comparison goods sales floorspace at 2028 (again, depending on format and operator), after account has been taken of existing commitments. This is forecast to increase to between 9,200 sq.m and 21,200 sq.m at 2033.

9.09 The market share of comparison expenditure claimed by facilities within St. Helens Borough is supported by the strong performance of the two retail parks. The change in the character of the retail offer at the retail parks (particularly Ravenhead Retail Park) has created strong retail destinations with a much wider appeal than their original ‘bulky goods’ offer. Whilst this has helped retain expenditure

locally, it is evident that the growth in the sale of non-bulky items needs to be carefully monitored in the future to ensure that the further growth and expansion of the town centre is not compromised.

- 9.10 Although it is considered that the Council should seek to plan for the reuse, refurbishment or redevelopment of the existing vacant units in the town centre wherever possible in order to accommodate this comparison goods requirement in the first instance, it is apparent that the demand for small scale retail units is currently limited. As such, the Council may wish to develop incentives to encourage more independent operators to locate in the small scale units within the town centre.
- 9.11 If the Council wishes to attract additional national comparison goods operators to St. Helens, it is likely that further medium to large scale retail units would be required. However, the demand from national multiple comparison goods operators is likely to be limited in the short term, and consideration should be given to the type of medium-term development which can provide new, larger format accommodation to cater for national multiples.

Table 9.2: Quantitative Need for Comparison Goods Floorspace in St. Helens' Catchment Post Commitments

	2018 (sq.m)	2023 (sq.m)	2028 (sq.m)	2033 (sq.m)
Minimum Comparison Goods Requirement	-5,900	-2,700	3,000	9,200
Maximum Comparison Goods Requirement	-9,800	-4,900	6,200	21,200

Leisure Strategy

- 9.12 We consider there to be a limited requirement for additional commercial leisure facilities based on the results of the household survey and the existing facilities available to residents within the Borough. In terms of bingo halls and cinema screens in particular, we believe there to be limited requirement for any additional facilities within the Borough. Whilst there is a clear demand for a new ten-pin bowling facility (due to the lack of any such facility within the Borough), we note the existing planning permission at Westpoint will provide a ten-pin bowling alley and we consider it unlikely that there will be further demand from operators, at least in the short term.
- 9.13 Looking at the current facilities within the town centre and the responses from the in-street surveys, we believe that there may be a requirement for additional restaurant facilities within the Borough and particularly within St. Helens town centre. Again, Westpoint will go some way to delivering such facilities, but we recommend that opportunities to bring forward additional quality food and drink uses

within the town centre (to provide for its diversification and future vitality and viability) are investigated.

Proposed Network of Centres in St. Helens

- 9.14 In drawing up Local Plans, Paragraph 23 of the NPPF requests that LPAs define a network and hierarchy of centres that is resilient to anticipated future economic changes. A plan showing the existing spatial distribution of the defined centres is included at Appendix 9.
- 9.15 In the absence of any definition to rely on in either the NPPF and or the associated 'Ensuring the Vitality of Town Centres' Planning Practice Guidance, the definition of different tiers of the retail hierarchy provided by the now superseded Planning Policy Statement 4: Planning for Sustainable Economic Growth (PPS4) remains of some relevance. In respect of the definition of town centres, district centres and local centres, PPS4 states the following:

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

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

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

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

9.16 Experian²⁸ defines the multi-functional offer of a city or town as including residential, public service, leisure and entertainment, commercial and cultural facilities (amongst others). Appendix 2 of the NPPF defines 'main town centre uses' as:

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

9.17 In accordance with the findings of this Study, and in the context provided by these definitions, we recommend the Council retains St. Helens at the top of the hierarchy as the main town centre. We consider St. Helens continues to perform a vital role for residents of the Borough and despite the overall decline in the vitality and viability and market share, the town centre has an important role and contains a good representation of retail, leisure, and civic uses that to cater the need of the Borough's residents. Furthermore, it will be important to ensure that any new development, if it materialises, is directed towards St. Helens town centre in the first instance so as to help to reclaim some of the market share which has been lost, particularly in relation to comparison goods.

9.18 Our healthcheck analysis of the other existing defined centres within the Borough demonstrates that Earlestown, whilst lacking the comparison goods offer that one would generally associate with a town centre, still performs an important role in the eastern urban area of the Borough and is significantly larger than the two defined district centres. We therefore consider that Earlestown remains designated as a town centre, albeit below St. Helens town centre in the Borough's hierarchy.

9.19 Turning to district and local centres, we broadly consider that the current designations are appropriate. However, we do recommend that Chancery Lane's is de-designated due to the decline in retail, leisure and service uses over the past 10 years.

9.20 As a consequence of these recommendations, our proposed hierarchy and network of centres for St. Helens is provided below.

- **Tier 1: St. Helens town centre**

²⁸ 'Town Centre Futures 2020', Experian, September 2012



- **Tier 2: Earlestown town centre**
- **Tier 3: District centres – Rainhill and Thatto Heath**
- **Tier 4: Local Centres – Billinge, Chain Lane, Clipsley Lane, Denton's Green, Eccleston, Fingerpost, Marshall's Cross, Newton-le-Willows, Newtown, Rainford, Sutton**

Recommended Local Impact Threshold

9.21 In accordance with the requirements of paragraph 26 of the NPPF, it is appropriate to identify thresholds for the scale of edge of centre and out of centre retail, leisure and office development which 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 should be subjected to the sequential test²⁹).

9.22 Paragraph 26 of the NPPF states that:

'When assessing applications for retail, leisure and office development outside of town centre, which are not in accordance with an up-to-date Local Plan, local planning authorities should require an impact assessment if development is over a proportionate, locally set floorspace threshold (if there is no locally set threshold, the default threshold is 2,500 sq.m).'

9.23 The Ensuring the Vitality of Town Centres Planning Practice Guidance provides further clarification in respect of the impact test and the setting of local thresholds. Paragraph 13 of the Practice Guidance states that:

'The purpose of the test is to ensure that the impact over time (up to five years (ten for major schemes)) of certain out of centre and edge of centre proposals on existing town centres is not significantly adverse. The test relates to retail, office and leisure development (not all main town centre uses) which are not in accordance with an up to date Local Plan and outside of existing town centres. It is important that the impact is assessed in relation to all town centres that may be affected, which are not necessarily just those closest to the proposal and may be in neighbouring authority areas.'

9.24 Paragraph 16 provides specific guidance in relation to floorspace thresholds and states:

²⁹ With the exception (in accordance with paragraph 25 of the NPPF) of small scale rural office proposals and other small scale rural development

'The impact test only applies to proposals exceeding 2,500 square metres gross of floorspace unless a different locally appropriate threshold is set by the local planning authority. In setting a locally appropriate threshold it will be important to consider the:

- **Scale of proposals relative to town centres**
- **The existing viability and vitality of town centres**
- **Cumulative effects of recent developments**
- **Whether local town centres are vulnerable**
- **Likely effects of development on any town centre strategy**
- **Impact on any other planned investment.'**

9.25 We do not consider that the imposition of a blanket threshold will usually be appropriate across all types of centre within an administrative area. For example, a convenience store with a net sales area of 250 sq.m (which could be operated by, for example, Tesco Express or Sainsbury's Local) would have a significantly greater impact on a small centre than it would on a large town centre. Therefore, in implementing a local threshold policy, it is considered more appropriate to apply a range of thresholds in accordance with the type of centre the proposed development is proximate to. The thresholds should not only apply to new floorspace, but also to changes of use and variations of condition to remove or amend restrictions on how units operate in practice.

9.26 Where there is genuine potential for an application proposal to divert a material level of expenditure away from a defined centre, or potentially remove important tenants from that centre, then it will likely be necessary to consider the impacts arising from the proposal in detail. In this instance, we consider that there is a real potential for edge or out of centre comparison goods retail schemes to have a significant impact on the overall health of St. Helens town centre, and, therefore, we believe that a relatively low impact threshold should be applied to ensure that the Council retains appropriate control over such development. We note that there are a relatively limited number of units greater than 500 sq.m in St. Helens town centre (less than 10% of the total stock of commercial units have a greater floorspace than this) and we consider that a unit of such a scale could potentially accommodate an operator of importance to the future vitality and viability of the town centre.

9.27 Furthermore, we also note that the threshold applies to individual application proposals and that it could be possible for an applicant to 'circumnavigate' the requirements of the test through the submission of multiple, small-scale applications which together would provide for a larger



development. As such, we recommend that the impact threshold of relevance to St. Helens town centre is set at 500 sq.m.

- 9.28 This recommendation is reflective of the town centre's vacancy rate (the proportion of vacant units is above national average), the reduction in its market share of comparison goods expenditure since the undertaking of the previous Retail Study, and the potential for existing nearby out of centre retail destinations to become even stronger in the future at the expense of the centre.
- 9.29 Due to the smaller scale of Earlestown town centre, and the relatively modest size of most of its commercial units, we consider it appropriate for a lower impact threshold of 300 sq.m to apply to potential development proximate to this centre. Once more, less than 10% of the stock of commercial units in the centre provides a greater quantum of floorspace. Accordingly, in the local context, 300 sq.m constitutes a substantial sized unit. The setting of a lower threshold for Earlestown will ensure that schemes which have the potential to result in significant adverse impacts are appropriately assessed, in order that appropriate consideration is given to Earlestown's vitality and viability in considering the acceptability of future development.
- 9.30 For the district and local centres within St. Helens Borough, it is recommended that a lower policy threshold of 300 sq.m and 200 sq.m respectively applies. These lower thresholds are set at a level which ensures that the impacts arising from proposed convenience stores operated by 'main four' food retailers (which can have a substantial seven-figure turnover) can be appropriately considered. We are aware of recent appeals where Inspectors have found that such convenience stores can have a significant adverse impact on smaller centres³⁰. We believe that this type of development has the potential to divert expenditure and potential operators from the Borough's smaller centres and that the setting of lower thresholds is therefore justified.
- 9.31 We believe that the proposed lower thresholds for district and local centres are appropriate as a consequence of their localised role and function, and the fact the opening of a small format convenience store outside of these smaller centres is likely to directly compete with type of local needs provision typically found within such centres. We therefore believe it is reasonable for applicants

³⁰ Such cases include the appeal against the refusal of planning permission for a Tesco Express at Luton (PINS reference APP/B0230/A/13/2203864) and the appeal against the refusal of planning permission for a Sainsbury's Local (PINS reference APP/e59000/A/14/2217680) at Tower Hamlets



proposing developments of 300 sq.m gross for district centres and 200 sq.m gross floorspace for local centres and above, to demonstrate that their proposal will not have a significant adverse impact on smaller centres sharing part of the same catchment.

- 9.32 The proposed thresholds at district and local centre level are considered to reflect the relatively small size of some of the centres at the lower end of the retail hierarchy and their consequent potential susceptibility to alternative 'out-of-centre' provision. In practice, it is envisaged that a proposal of just greater than 300 sq.m adjacent to a district centre and 200 sq.m adjacent to a local centre would generally require an impact assessment of proportionate length (i.e. for development of such a scale, impact may on occasion be able to be dealt with as part of the covering letter accompanying the application). Where an application proposal is above the respective stated impact threshold, we would recommend that the applicant discusses and agrees the scope of the retail impact assessment with the Council prior to submission. The lower threshold of 200 sq.m for local centres is considered appropriate due to potential for convenience stores of even a relatively small nature could substantially impact upon the performance of existing operators, due to the potential higher sales densities of such proposals. This would ensure that particular protection of these smaller centres is considered appropriately.
- 9.33 We believe that it is appropriate to qualify the area to which each local impact threshold will apply. We recommend that the thresholds of relevance to Earlestown town centre and to the Borough's district and local centres would be applicable within 800 metres of the boundary of the relevant centre. The distance of 800 metres is considered to be broadly commensurate with the potential walk-in catchments of smaller centres and is identified by Guidelines for Providing for Journeys on Foot (The Institution of Highways & Transportation, 2000) as being the 'preferred maximum' acceptable walking distance to a centre. We consider it to be appropriate for the higher threshold of 500 sq.m to apply Borough-wide (beyond 800 metres of these centres), due to the lesser likelihood of significant adverse impacts arising from retail, leisure and office development.
- 9.34 In our experience, it will only generally be development of a scale greater than these thresholds which could lead to a 'significant adverse' impact, which could merit the refusal of an application for town centre uses in accordance with the provisions of paragraph 27 of the NPPF.

Review of St. Helens' Borough Town Centre Boundaries

9.35 In considering the Council's future strategy for the Borough, we have provided recommendations in relation to appropriate town centre boundaries, primary shopping areas and, where appropriate, retail frontages. We have provided recommendations for St. Helens town centre, Earlestown town centre, the two district centres of Thatto Heath and Rainhill, plus the 12 local centres, which are identified by the St. Helens Core Strategy (2012). We have made these recommendations taking into account the definitions provided by the NPPF as follows:

'Primary shopping area: Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage).

Primary and secondary frontages: Primary frontages are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. Secondary frontages provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses.

Town centre: Area defined on the local authority's proposal map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area'.

9.36 Each of the recommended boundaries are included on the diversity of use plans included with each respective healthcheck analysis for each of the centres at Appendices 4, 5, 6 and 7. We provide a summary with regard to St. Helens, Earlestown, Rainhill and Thatto Heath below.

St. Helens Town Centre

Town Centre Boundary

9.37 The existing St. Helens town centre boundary as defined by the adopted development plan is relatively extensive, particularly to the north covering large areas of residential uses and other non-town centre uses.

9.38 However, WYG recommends that the existing town centre boundary is substantially tightened to the north, north-east and south-east as shown on the recommended and existing town centre boundary plan at Appendix 4. These areas predominately comprise industrial and residential uses and are not considered to function as part of the town centre, nor do they specifically improve the overall offer of the town centre. To the east, the railway line forms the new recommended boundary, whilst to the north, the boundary traces the southern extent of the residential area and traces the retail and service

units to the north of Duke Street. We have recommended that the Asda and other commercial uses in close proximity to the south western edge of the centre remain within the boundary, due to the importance of these operators in drawing shoppers to the centre (as evidenced by the household survey). The A58 ring-road acts as a 'natural' boundary to the south west of the town centre and we have therefore recommended that the new Linkway development at Westpoint is not included within the boundary. This is primarily due to the lack of any direct and accessible crossing over the A58. In any event, we consider that the proposed development, once completed, will add to the overall offer of the centre and that shoppers may still link their trips with the wider offer.

- 9.39 This consolidated boundary reflects a more appropriate representation of a town centre as defined by the NPPF.

Primary Shopping Area

- 9.40 St. Helens town centre's existing primary shopping area is defined by the St. Helens Unitary Development Plan Proposals Map Town Centre Inset (as revised by October 2012 Core Strategy to form interim update). WYG considers the currently defined primary shopping area to remain broadly robust and appropriately covers the area within which retail uses are concentrated. However, some small adjustments to the boundary to exclude the existing Sports Direct unit, and therefore traces along North St. John Street and Water Street. WYG considers that the proposed primary shopping area appropriately outlines the area where retail development is concentrated, as defined by the NPPF.

Shopping Frontages

- 9.41 Primary and secondary frontages are defined within Annex 2 of the NPPF. The definition states that primary frontages are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods and secondary frontages are defined as providing greater opportunities for a diversity of uses such as restaurants, cinemas and businesses.
- 9.42 St. Helens town centre's existing primary retail frontage is defined by the St. Helens Unitary Development Plan Proposals Map Town Centre Inset (as revised by October 2012 Core Strategy to form interim update). There is currently no designated secondary retail frontage within the UDP or Core Strategy. The existing primary frontages primarily cover Church Street.



- 9.43 It is recommended that the primary retail frontages are extended to continue to incorporate the full stretch of Church Street and south eastern end of Ormskirk Street and to include the frontages of units that form the Church Square Shopping Centre (comprising the Lagrange and Palatine Arcades to the west, and St Mary's and Brownlow Arcades to the east) and the Hardshaw Centre as shown on the diversity of use and recommended boundaries plan at Appendix 4. These areas are considered to contribute well to the retail core of the primary shopping area.
- 9.44 The proposed policy restricting non-Class A1 retail uses within the primary retail frontages will ensure that frontages continue to function in a manner which is consistent with the NPPF definition, i.e. defined primary shopping frontages should accommodate a high proportion of Class A1 uses. The provision of a strong retail focus in the core of the town centre should assist the centre to compete with out of centre retail parks and superstores, and therefore assist in maintaining its future vitality and viability.
- 9.45 Within the recommended extended primary retail frontages, we calculate that approximately 75% of the units are in Class A1 Use (i.e. 99 out of 132 units). This proportion of Class A1 uses within the primary frontage accords with the NPPF definition and, as such, proposals which could result in a lesser amount of Class A1 retail floorspace should be carefully considered by the Council in light of the benefits associated with maintaining a strong retail core. As such, to provide for some flexibility which may assist in bringing currently vacant units back into active use, we recommend that the Council seeks to maintain 70% of the primary frontage in Class A1 use through policy controls.
- 9.46 With regards to secondary retail frontage, WYG recommends that the remaining retail and service units within the primary shopping area form the secondary frontage. This incorporates the retail and service units on Ormskirk Street, Bridge Street, Hardhsaw Street, Barrow Street, Cotham Street, Westfield Street and Baldwin Street.
- 9.47 We consider that our recommended primary frontages appropriately includes a high proportion of retail uses which may include food, drinks, clothing and household goods and the secondary frontages provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses, as defined within the NPPF.

Earlestown Town Centre



Town Centre Boundary

- 9.48 The existing Earlestown town centre boundary is defined by the St. Helens UDP 1998 Proposals Map Earlestown Inset. It incorporates the majority of the town's existing retail and service facilities, as well as areas of residential uses to the south-west and south-east. It is recommended that the existing town centre boundary is tightened to the south-west and south as shown on the diversity of use plan. This is to exclude the residential area to the south-west of the town-centre, as well as industrial uses to the direct south. These areas are not considered to function as part of the town centre.

Primary Shopping Area

- 9.49 There is currently no adopted primary shopping area for Earlestown (although a 'Prime Shopping Area' was defined on the UDP Proposals Map along sections of Market Street, Bridge Street and Oxford Street. This designation identified where UDP Policy E2 would apply which effectively sought to restrict inappropriate non-retail uses in this area). In line with the NPPF, WYG considers that it is important to define new Primary Shopping Area boundaries to assist in policy making and development control purposes. The purpose of defining the primary shopping area is to direct main town centre uses to the 'heart' of the centre in the first instance and we consider this to be an important additional control for Earlestown.
- 9.50 The core shopping area in Earlestown is situated along the pedestrianised Market Street and the adjoining Bridge Street. These two streets contain the highest density of retail and service uses within the town centre boundary. It is also recommended that the primary shopping area includes Tesco, Wilkinsons and Home Bargains and incorporates Market Square. These retailers act as key drawing factors to the centre and are considered to function as part of the retail core.
- 9.51 A copy of the plan showing the recommended district centre boundary is included at Appendix 5.
- 9.52 We do not recommend the designation of frontages within the centre due to the limited size, nature and offer of Earlestown and that there could be no clear distinction between primary and secondary frontages. Instead, the commercial offer is spread evenly throughout the extent of the primary shopping area.

Rainhill District Centre



- 9.53 Rainhill district centre does not currently have an adopted district centre boundary. The retail and service facilities in Rainhill are located primarily on Warrington Road and this area should be covered within the boundary. To the east, it is recommended that the town centre boundary extends along Warrington Road until View Road as shown on the diversity of use plan. The St Anne's Church Millennium Centre is not included within the recommended boundary as it is not a main town centre use as defined by the NPPF.
- 9.54 To the west, it is recommended that the boundary extends past the railway line in order to incorporate the western cluster of retail units as shown on the diversity of use plan. This parade of units is considered to function as part of the district centre, despite being located approximately 100m west of the central parade. Due to the size of the centre, we do not recommend the Council defines a primary shopping frontage within the centre.
- 9.55 A copy of the plan showing the recommended district centre boundary is included at Appendix 6.

Thatto Heath District Centre

- 9.56 Thatto Heath district centre does not currently have an adopted town centre boundary. The retail and service facilities within Thatto Heath are located along Thatto Heath Road and Elephant Lane, with the highest concentration of uses located along Thatto Heath Lane.
- 9.57 The boundary proposed by WYG covers all of the main town centre uses, including the medical centre, Co-op foodstore and other retail services. Whilst we note that the Thatto Heath library is located to the north of the railway line and outside of the proposed boundary, despite this we do not recommend that the use is included within the boundary. This is due to the slightly divorced nature of the library from the main town centre uses within Thatto Heath. Due to the size of the centre, we do not recommend the Council defines a primary shopping frontage within the centre. A copy of the plan showing the recommended district centre boundary is included at Appendix 6.

Local Centres

- 9.58 WYG has also provided recommendations regarding the proposed defined town centre boundaries for the local centres within the Borough which do not currently have adopted boundaries. Plans showing the proposed boundaries for the local centres are included at Appendix 7.



Glossary of Terms

Capacity	Retail capacity in terms of this report refers to surplus/deficit of expenditure (£m) which represents the difference between the expenditure and turnover of the identified facilities.
Comparison Goods	Comparison goods relate to items not obtained on a frequent basis, these include clothing, footwear, household and recreational goods. A more detailed breakdown of comparison goods categories is provided below.
<i>Chemist Goods</i>	<i>All consumer retail expenditure on prescription and non-prescription drugs, adhesive and non-adhesive bandages, first-aid kits, hot-water bottles, toilet shops, sponges, and so on.</i>
<i>Clothing & Footwear</i>	<i>All consumer retail expenditure on shoes and other footwear, garments for men, women, children and infants either ready-to-wear or made-to-measure, underwear, ties, handkerchiefs, scarves, and so on.</i>
<i>DIY Goods</i>	<i>Includes all consumer expenditure on hardware, DIY, decorator's supplies and garden centre type goods. This category includes products such as hammers, saw, screwdrivers, wallpaper, plumbing items, floorboards, ceramic tiles, plants, pots, turf for lawns, and so on.</i>
<i>Electrical Goods</i>	<i>All consumer retail expenditure on domestic electrical and gas appliances, such as washing machines, dryers, dishwashers, ironing and press machines, cookers, freezers and fridge-freezers, coffee makers, radios, televisions, DVD players, and so on.</i>
<i>Furniture Goods</i>	<i>Includes all consumer expenditure on furniture, floor coverings and household textiles such as beds, sofas, tables, cupboards, bed linen, curtains, towels, lamps, mirrors, and so on.</i>
<i>Household Goods</i>	<i>Includes household textiles and soft furnishings, china, glassware, jewellery and other miscellaneous goods such as greeting cards, notebooks, pens, pencils, and so on.</i>



Recreational Goods *All consumer retail expenditure on bicycles and tricycles (excluding toy bicycles), musical instruments, sports equipment, camping equipment, toys of all kinds including dolls, soft toys, and so on.*

Convenience Goods Convenience goods relate to everyday essential items including confectionary, food, drinks, newspapers and magazines.

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

Expenditure Per Capita The average spend of each person within the defined Study Area on a variety of retail goods.

Expenditure Expenditure is calculated by taking the population within a defined area and then multiplying this figure by average annual expenditure levels for various forms of goods.

Expenditure Forecasts This assessment has been undertaken using the 'goods based' approach as prescribed in the Planning for Town Centres Practice Guidance. Retail expenditure forecasts have been derived from Experian Retail Planner Briefing Note 15 (December 2017).

Experian (MMG3) The database used to identify population, expenditure and socio-economic breakdown of the Study Area population.

Gross Floorspace Represents the level of total floorspace or footprint of a specific development (i.e. sales area, storage, checkouts, café, display, and so on).

Goald Plans Provide accurate information on the composition of town centres, shopping areas, out-of-town retail parks and outlet villages in the UK. Identifies the fascia name, retail category, floorspace, and exact location of all retail outlets and vacant premises.



Goad Reports	Provide a snap-shot of the retail status or demographic make-up of Goad surveyed town centres. Provides a comprehensive breakdown of floorspace and outlet count for all individual trade types in the Convenience, Comparison, Retail Service, Leisure, Financial/Business Services and Vacancy sectors.
Local Centre	Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a local centre.
Net Floorspace	Represents the level of internal area devoted to the sale of goods.
Market Share	Market shares derived from the household survey results, which are based on either the proportion of shopping trips or the proportion of expenditure attracted to a particular centre/facility.
National Multiple	This is defined as a retail or service operator which is or part of a network of nine or more outlets.
Price Base	The price base for the Study is 2016.
Rates of Productivity	This considers the potential for existing retail floorspace to improve their turnover productivity (e.g. smaller goods could be sold from a smaller area for more money, increased opening hours, etc.).
Sales Density	Retail capacity figures are expressed in term of floorspace, relying on the application of assumed sales density figures to the surplus expenditure identified. This is based on the typical turnover of a store by square metre/foot.
Special Forms of Trading	Defined by Experian as expenditure not directed to traditional floorspace such as the internet, mail order, party plan and vending machines and other non-store activity such as market and road-side stalls.



Study Area	This represents the household survey area, which is based on postal sectors.
Trade Draw	This refers to the level of trade attracted to a facility/centre from an area.
Turnover	The turnover figure relates to the annual turnover generated by existing retail facilities.
Town Centre	A town centre in many cases will be the principal centre in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas.

