



St Helens Council

St Helens & Earlestown Retail and Town
Centre Uses Study

Final Report

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1.0 Introduction

Objectives of Study

- 1.01 WYG Planning & Design (WYG) was commissioned by St Helens Council in February 2011 to undertake the St Helens & Earlestown Retail and Town Centre Uses Study (hereafter referred to as 'the Study'). The objectives of the Study were established by the Council's Tender Brief, dated December 2010, with the key focus being the provision of an up-to-date assessment of the future capacity for retail and other town centre development in the Borough's two principal town centres of St Helens and Earlestown. The provision of an up-to-date Study is of particular importance given the downturn in the UK economy since the reporting of the previous Retail Study in 2005, which has had a notable impact on the retail sector.
- 1.02 The Tender Brief also establishes a requirement to undertake Town Centre Health Checks for both St Helens and Earlestown; to review designated boundaries within the two town centres in accordance with the provisions of Planning Policy Statement 4: Planning for Sustainable Growth (PPS4); and, to provide policy recommendations to assist in the preparation of future retail planning policy and strategies.
- 1.03 In order to provide an appropriate and comprehensive update, new empirical research has been undertaken, including a telephone survey of 1,000 households within the Borough and beyond in order to ascertain retail expenditure patterns. Additional surveys have also been undertaken to ascertain both retailers' and shoppers' views in order to identify current strengths and weaknesses in the town centre offer, and measures which would improve the attractiveness and function of St Helens and Earlestown Town Centres. The Study also draws upon a comprehensive WYG survey of existing operators in both town centres and involves the examination of existing data sources, such as Experian Goad, FOCUS and Valuation Office Agency data.

Format of Report

- 1.04 In order to respond appropriately to the requirements of the Tender Brief, the report is structured as follows:
- Section 2 summarises current and emerging national retail trends and shopping patterns;
 - Section 3 provides our review of the national, regional and local retail planning policy of relevance to the Study;



- Section 4 sets out our findings in respect of the on-street, business and market traders surveys which have been undertaken to inform the Study;
- Section 5 summarises our assessment of the current vitality and viability of the two centres;
- Section 6 considers the results of the household survey and sets out the key findings with regard to retail expenditure patterns across the Study Area and claims on expenditure made by the two town centres;
- Section 7 considers current and future population and expenditure levels within the Study Area;
- Section 8 sets out our assessment of quantitative need for further convenience and comparison goods floorspace over the period to 2016, 2021 and 2026, taking into account claims on expenditure growth; and
- Section 9 provides our policy recommendations and summarises our conclusions.



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.
- 2.02 During this time, the retail and leisure sectors have both experienced considerable expenditure growth. Although this growth has been limited in very recent years, for most of the past decade or more, spending on retail goods has increased significantly, particularly spending on comparison (or non-food) goods. This expenditure growth has been attributable to a number of factors, including greater disposable income, cheaper prices and new technology.
- 2.03 The retail market is continually changing as a result of shifts in demographics, evolving planning policy and due to technological advancements, such as e-tailing. These changes have had a subsequent impact on the format of retail and leisure floorspace, with signs that retail development has increasingly been directed towards town centres in recent years. This trend exemplifies the 'town centre first' policy approach which has been pursued by recent Governments and is outlined in Planning Policy Statement 4: Planning for Sustainable Economic Growth (2009).

Current Retail Picture

- 2.04 Research undertaken by Colliers CRE¹ provides information on recent trends together with forecasts for the future of retailing in the UK. The research confirms that the retail sector has been significantly affected by the economic climate and uncertainty remains about the strength and durability of future growth. It is noted that whilst sales volumes and footfall were high at the start of 2011, more recently, the retail market has taken a turn for the worse. The significant reduction in Government spending due to austerity measures, along with the increasing unemployment figures, do not bode well for future gross domestic product growth.
- 2.05 These factors have had a significant impact on the public's confidence and their propensity to spend their earnings on retail goods. Furthermore, recent and proposed increases in taxation (e.g. rises in

¹ 'Great Britain Retail: Autumn 2011', Colliers CRE, 2011.



VAT, national insurance contributions and capital gains tax) also suggest that growth in household spending is not likely to counterbalance any public sector retrenchment in the short term. In addition, it is noted by Colliers CRE that inflation has risen to such a level that it is currently outpacing average earnings growth by approximately 2.5%.

- 2.06 Colliers CRE also reports² that economic conditions are resulting in significant structural changes to the High Street, whereby many retailers are showing signs of caution by reducing the size of their property portfolios, abandoning weaker towns and concentrating on acquiring sites in city centres and major regional shopping centres. Comparison goods retailers are finding it increasingly difficult to justify being represented in every town in the UK. Large cities and towns which offer an 'experience' and choice for customers and high volume trading potential for the retailers continue to be attractive. Colliers CRE indicates that this situation is unlikely to change as the major comparison goods retailers look for the most cost effective ways to sell product and focus on the larger markets and online retailing, with 'mid-market' town centre retailing being squeezed as a result.
- 2.07 As a consequence of the above, demand has reduced considerably for 'poorer stock' in secondary locations and in many smaller towns with a commensurate drop in value (and often rent). Voids have increased, resulting in a lack of investment in the upkeep of premises and a deleterious impact on the overall attractiveness of centres. However, due to the fragility of the economy as a whole and the difficulties in securing investment, the development pipeline has been turned off and there are now opportunities for rental inflation for well-configured shops in major towns and cities which meet the needs of modern retailers. In short, there has been a marked polarisation, characterised by diminishing demand for secondary premises in smaller locations and the ever greater attractiveness of well located and appropriately configured floorspace in centres of sub-regional and regional importance.
- 2.08 Given current spending patterns and the wider economic climate, it is unsurprising that Experian, which monitors and forecasts retail consumer expenditure in the UK, has reviewed its forecast growth rates for both convenience and comparison goods expenditure in recent years. Experian's forecast annual per capita convenience goods growth rate³ is now -0.3% in 2011, +0.4% in 2012 and +0.5% in 2013, following negative growth in two of the three years prior to 2011. Similarly, over the short

² 'Midsummer Retail Report', Colliers CRE, 2011.

³ Annual average per capita expenditure goods growth rates sourced from 'Retail Planner Briefing Note 9', Experian, September 2011.



term at least, Experian's forecast annual per capita comparison goods growth rates⁴ are also considerably more circumspect than in previous years, with forecast growth of +0.5% in 2011, +1.6% in 2012 and +2.1% in 2013, after very minimal growth in 2010 and negative growth in 2009.

2.09 In line with Experian's expectations, it has been widely reported that a number of high street retailers suffered poor trading figures during 2009 and 2010, resulting in many operators selling heavily reduced goods. Indeed, despite heavy discounting over the 2008 festive period and the reduction in VAT from 17.5% to 15.0% until January 2010, a significant number of 'big name' retailers fell into administration in 2008 and 2009, including Woolworths, Adams and Zavvi. Whilst retail administrations did fall considerably in 2010⁵, further companies affected last year include Envy, Ethel Austin, Faith Shoes, Habitat, Thorntons and Suits You.

2.10 Despite the difficulties set out above and the general decline in the comparison goods sector, specific types of goods continue to perform well. The market for recreational goods (including DVDs, CDs, toys, computers and books) has, as a whole, performed well in recent years, with healthy growth attributed to supermarket sales together with the growing popularity of online shopping, which continues to see an increase in sales year-on-year. However, the increasing popularity of the internet to purchase books and music in particular has had a notable impact on the composition of town centres, with such stores (with the exception of HMV/Waterstones) all but disappearing from the high street.

2.11 As an apparent direct consequence of wider economic conditions, Colliers CRE and Verdict⁶ research indicates that discount convenience retailers (including Lidl, Aldi and Netto) performed strongly during 2008 and 2009 and sought to acquire additional sites which conform to their trading model, i.e. edge-of-centre site which will provide for a single storey building in the order of 1,000 sq.m and around 100 car parking spaces. However, growth in this sector begun to slow in 2010 due to lower consumer sensitivity to price as the economy started to recover and due to a vigorous response from the 'big four' convenience goods retailers (Asda, Morrisons, Sainsbury's and Tesco) in the form of lower price promotions and additional value lines.

⁴ Ibid.

⁵ Reported by the 'Who's Gone Bust in Retailing 2010-11?' Retail Briefing, Centre for Retail Research, March 2011.

⁶ 'UK Food & Grocery Retailers', Verdict, September 2010.



2.12 The influence of the sector has also been affected by Asda's acquisition of Netto, which will result in the rebranding of around 150 such stores from the summer of 2011. As part of the deal, Asda were compelled by the Office of Fair Trading to dispose of a number of the acquired Netto stores, including its store at Haydock Street in Earlestown, which was acquired by Morrisons.

2.13 At the other end of the market, Marks & Spencer Simply Food has not performed as strongly as it has done previously, with additional food store openings acting to cannibalise food sales in its main store food halls. As a result, it was announced in January 2009⁷ that 25 Simply Food stores were to close in the UK, following a two or three year period of rapid expansion.

Trends in Comparison Goods Shopping

2.14 Whilst it is anticipated that growth in retail spending over the next ten years will not mirror that of the last decade, there will continue to be some growth in comparison goods expenditure. Consequently, there is increasing impetus from retailers to achieve more efficient use of floorspace, particularly given the recent poor performance of many national multiples, many of which have been affected by the significant increase in e-tailing. As a consequence of their recent performance, retailers are more reluctant to commit to new development than they have been in previous decades. Instead, they are more selective and are holding out for accommodation that is appropriate both in terms of location and the type of premises provided. Indeed, retailers are seeking to occupy larger units in order to achieve more efficient use of floorspace and attract shoppers from a wider area. These larger floorplates enable retailers to provide a greater range of goods.

2.15 International market conditions and price deflation in some key sectors means that many high street names are becoming increasingly vulnerable to takeovers. Similarly, due to increased competition there have been a number of high profile losses from the high street, including Littlewoods, Music Zone, Woolworths, MFI and The Pier. Colliers CRE⁸ reports that consolidation and cost reduction in relation to high street property continues to be a priority for many retailers. This is being pursued through disposals, company voluntary administrations (CVAs), informal arrangements with landlords, lease expiries and break options. The Insolvency Service has reported that retailer failures increased 55% from 80 in Q4 2010 to 124 in Q1 2011 and that the number of retail CVAs increased from 23 to 30 over the same period.

⁷ Reported by The Guardian, 7 January 2009.

⁸ 'Great Britain Retail: Autumn 2011', Colliers CRE, 2011.



2.16 Whilst there is likely to be continued demand for larger, modern retail units in the future, increased sensitivity over future viability will mean a cautious approach to new investment for many key national retailers. Marginal locations within centres will increasingly be rejected. Many national retailers, who would have previously considered smaller/lower order centres in order to increase their market share, are now assessing the performance and their future strategies given the ongoing downturn in the economy. Consequently, many investment decisions will be influenced by the scale of commitment from other retailers; developers will increasingly need to promote large town centre redevelopment schemes if they are to attract high quality retailers.

Trends in Food Retailing

2.17 In the aftermath of the growth in the number of edge and out-of-centre large format supermarkets during the 1990s, the development of such facilities is now more limited due to stricter planning laws (following the publication of PPS6 and subsequently PPS4) and a lack of suitable sites. As a result, the national multiples in the food retailing sector are finding a range of other measures to improve their market share. These include:

- Offering a wider product range, such as financial and insurance products, petrol and non-food goods;
- Developing a wide range of retail models, for example small-format convenience stores in town centres (e.g. Sainsbury's Local, Tesco Express), smaller supermarkets mostly in town centres (e.g. Tesco Metro), superstores (e.g. Tesco) and hypermarkets (e.g. Tesco Extra, Asda Supercentres);
- Extended opening hours;
- Offering cheap products and no-frills service;
- Providing an attractive and powerful brand image; and
- Offering a home delivery service.

2.18 Verdict⁹ estimates that the food and grocery sector will be worth £130 billion in 2011, equating to annual growth of 3.2%, representing 43.7% of total retail spend. The dynamics of the market have changed rapidly, with inflation the primary driver of any growth which remains. Supply-driven inflation has continued to impact on raw materials and logistics costs, whilst consumers continue to remain highly price sensitive. As a result, grocers have taken much of the impact of this inflation and

⁹ 'UK Food & Grocery Retailers 2011', Verdict, September 2011.



continue to offer significant promotions and multibuy offers. Even so, volume growth has slowed substantially, with Verdict forecasting it to be just 1.1% in 2011.

- 2.19 Verdict identifies that the 'credit crunch' and subsequent recession – allied with a bout of inflation – has had an impact on consumer behaviour and the wider dynamics of grocery retailing. There has been a significant polarisation of the market, whereby consumers are looking to save money on day-to-day items but also eat high quality food as a 'treat' or an alternative to eating out.
- 2.20 Price, or specifically value, is now identified as a key issue for consumers and more and more shoppers are looking at value for money. Shoppers now realise that they are able to trade down and switch to own-label ranges to save money without sacrificing on quality. As weekly food budgets fall and consumers alter their shopping habits, it is anticipated that growth will be limited and the battle for market share will intensify further. Winning a share of consumer spend will require more than low prices, with shoppers increasingly seeking to source high-quality, good value food.
- 2.21 Verdict has also reported¹⁰ that the food and grocery sector is being impacted by changing UK demographics. For example, there has been a rise in single occupancy young professional households who are 'time poor' and relatively 'cash rich'. Though their baskets might be small, they tend to buy higher value items therefore providing an opportunity to boost volume and value growth. Elsewhere, an ageing population profile is leading to a rise in time rich consumers who are likely to do weekly shops rather than make frequent small trips. The contrasting requirements of these markets means that retailers are seeking both to add additional small stores to their portfolio and to open (and expand existing) larger stores. Accordingly, format flexibility will be essential to operators' success.
- 2.22 Between 2005 and 2010, grocery retailers' total space increased by 10.6%, delivering an additional net 11.8 million sq.ft of new floorspace. The 'Big Four' supermarket operators (Asda, Morrisons, Tesco and Sainsbury's) in particular continue to seek out opportunities to provide additional floorspace, though Verdict¹¹ suggests that gaining market share from the opening of new stores will become increasingly difficult for the leading grocers due to growing cannibalisation of sales from existing stores. However, Verdict still estimates that between 2010 and 2015, grocers will increase

¹⁰ 'UK Food & Grocery Retailers 2010', Verdict, September 2010.

¹¹ 'UK Food & Grocery Retailers 2011', Verdict, September 2011.



their space by 22 million sq.ft, almost twice the quantum of floorspace opened in the five years prior to 2010, even though retail growth will be much slower over the next five years.

- 2.23 Following a period of strong performance in 2008 and 2009, as a result of greater consumer price sensitivity and awareness of discounters' offers, the discount sub-sector is now showing signs of slowing to its previous, much lower, rate of growth. In the UK, the hard discount sector has comprised three operators, these being Aldi, Lidl and Netto. However, following the purchase of the third largest operator, Netto, by Asda in May 2010 (with a number of stores subsequently being sold on to Morrisons), the sector has now shrink significantly. Furthermore, lower consumer price sensitivity as the economy gradually recovers and a vigorous response from the 'Big Four' operators (through lower price promotions and value lines) has halted the defection of customers to the discount sector.

Out-of-Centre

- 2.24 The research undertaken by Colliers CRE¹² notes that demand for out-of-centre representation is limited, with recent poor trading figures and the failure of Focus DIY meaning that those retailers seeking to acquire stores have a pick of vacant stock. Some of the voids created by these administrations remain unlet and the flooding of the market with so much unwanted space has acted to reduce rents. Retailers who have had their pick of the best stores in recent years include Dunelm, Pets at Home, Dreams, Matalan, Dixons Group, Go Outdoors, Smyths Toys, B&M, Mothercare, Next Home and TK Maxx.
- 2.25 Looking forward, Colliers CRE reports the majority of out-of-town retail warehouse supply is being added to by the availability of existing stock which is being vacated, rather than through new development. Demand is reported as being 'patchy' and centred solely on prime bulky and open A1 schemes with good catchments and restricted supply. As a consequence, for most new build schemes to be viable, an element of food retailing or open A1 non-food retailing is likely to be required.

Shopping Centre Development

- 2.26 Colliers CRE¹³ states that town centre retail development is at a virtual standstill and that little activity is anticipated over the next few years – indeed, it reports that the next two years will see the lowest

¹² 'Midsummer Retail Report', Colliers CRE, 2011.

¹³ Ibid.



level of shopping centre completions in 50 years. A viable development is considered almost impossible to achieve no matter how well designed or well located a scheme is.

- 2.27 All but the very strongest of proposed schemes will require a strong and growing UK economy to ensure good retail demand, strong rental levels, reasonable incentive levels and the availability of good finance further improvement into the investment market and, critically, the availability of finance. With the well documented public sector job cuts and cost saving measures, these attributes are unlikely to come together in most medium sized and smaller towns for some time. Indeed, Colliers CRE suggests that it may only be foodstore-anchored development which will be viable in such centres in the short-term, not only because a food retail pre-let can support the overall viability of a scheme, but also because such an anchor will attract significant footfall thus driving demand across the remaining space.

Growth in E-tailing ('E-commerce')

- 2.28 Many consumers who previously shopped in town centres and at retail parks are now using the internet for some of their purchases. This trend is set to continue, although the exact impact that e-commerce will have on the high street has yet to be fully established. However, the rise in the UK in recent years of e-commerce has impacted upon retailers, developers and investors alike. As access to the internet/online shopping continues to grow through digital televisions and mobile phones, proportionally less money is anticipated to be spent in the high street or at retail parks.
- 2.29 The growth in use of the internet as a sales medium has been enabled by increasing access to the internet by households, with an increase in household access increasing from 61% in 2007 to 77% in 2011¹⁴. The proportion of households with access to the internet is expected to increase further over the coming years, alongside the growth in mobile phone and tablet internet access. This has supported the strong growth recorded, together with improved consumer confidence in the security of online payment, and heavy demand for expensive electrical products available online. The option of using the internet to 'click and collect' in-store is also increasing in popularity, with the service accounting for 20% of John Lewis internet orders.

¹⁴ 'Statistical Bulletin: Internet Access Households and Individuals', Office for National Statistics, August 2011.



- 2.30 Office for National Statistics (ONS) data¹⁵ indicates that the number of people using the internet to purchase goods continues to rise, with 66% of the UK population now having purchased products over the internet, compared to 53% at 2007. The most popular online purchases were clothes/sports goods, with 46% of internet users having purchased such items online. Additionally, 21% of users have purchased food or groceries and 38% have purchased household goods online.
- 2.31 Additional research conducted by the Interactive Media in Retail Group (IMRG) and analysts Capgemini¹⁶ indicates that internet shopping equates to some £58.8 billion of expenditure, with British shoppers spending £5.2 billion online in August 2011, a year-on-year growth of 14%.
- 2.32 The Top 10 e-retailers include Amazon UK, Argos, and Next. With regard to supermarket operators, major retailers with a significant online presence have seen their internet business grow as online shopping penetration has increased, and as the likes of Asda and Sainsbury's have improved their geographical coverage and capacity. The growth in online convenience shopping is corroborated by Experian's assessment¹⁷ that 7.4% of convenience goods purchases were undertaken via the internet or by other non-store special forms of trading in 2010 (albeit a proportion of this would actually be sourced and supplied from the shelves of a local supermarket).
- 2.33 It is therefore evident that internet shopping as a whole is having an impact upon traditional high streets, in light of increased competition and lower prices, and due to its convenience. Consequently, there is a possibility that online retailing will put some pressure on retail rental growth over the next five to ten years, but is unlikely to impact on capital values. Research by BCSC¹⁸ identifies that 'large' and 'very large' shopping centres (of over 40,000 sq.m) are deemed almost immune from the impact of online shopping as they offer the complete 'day out'. However, as the size of the shopping centres decreases, it is more likely that there will be greater adverse effects. Within small shopping centres (sized between 5,000 sq m and 20,000 sq m), including those in market towns, it is likely that the growth of online shopping could reduce turnover, notwithstanding any growth in disposable income.
- 2.34 Although there is a varied range of assumptions in terms of the future effect of online shopping, it is considered that e-tailing will not replace the shopping experience as shopping is a social activity. The BCSC research suggests that online shopping be considered a complementary tool to support retail

¹⁵ Ibid.

¹⁶ IMRG Capgemini e-retail Sales Index, August 2011.

¹⁷ Retail Planner Briefing Note 9, September 2010.

¹⁸ 'Future of Retail Property – Online Retailing: The Impact of Click on Brick', British Council of Shopping Centres, 2006.



sales from physical destinations. For successful retailers, online selling provides an additional route to the market. Online retailers benefit from demand generated through physical channels whilst high-street outlets can benefit from reaching a wider customer base through the internet. Clearly, those retailers who are likely to have a healthy future are those which combine a strong high street presence with an interesting and closely related e-tail offer.



3.0 Planning Policy Context

Introduction

3.01 Given that this Study seeks to provide evidence to assist in the production of the Local Development Framework (LDF), it is important to review key policy advice and explore how current national planning policy may impact upon the delivery of local policy.

Planning Policy Statement 4: Planning for Sustainable Economic Growth

3.02 The Government published the much anticipated Planning Policy Statement 4: Planning for Sustainable Economic Growth (PPS4) in December 2009, which provides essential guidance to assist in achieving the over-arching aim of sustainable economic growth. The document seeks to support growth which can be sustained within environmental limits, but also enhances environmental and social welfare and avoids greater extremes in future economic cycles.

3.03 In order to achieve such growth, paragraph 10 of the document sets out a number of key objectives for planning which can be summarised as follows:

- To build prosperous communities by improving economic performance;
- To promote regeneration and tackle deprivation;
- To deliver more sustainable patterns of development and reduce the need to travel;
- To promote the vitality and viability of established towns and other centres; and
- To raise the quality of life and environment in rural areas.

3.04 As well as providing guidance on the need to gather evidence and to monitor and manage the evidence base over time, the document is essentially sub-divided into two sections, with the first section focussing on plan making policies, and the second section on development management policies. In addition to PPS4 – which is a much more simplified document compared to the various statements and guidance that it replaces – there is lengthy accompanying Practice Guidance which provides additional detail on key retail policy tests including impact and the sequential approach. The Practice Guidance must be read in conjunction with the relevant sections of PPS4 which deal with retail planning matters and town centres.



3.05 In terms of planning for economic development, Policy EC2.1 of PPS4 indicates that local planning authorities should ensure that their development plan:

- Sets out a clear economic vision and strategy for their area which encourages sustainable economic growth;
- Supports existing business sectors, but with sufficient flexibility to respond to changes in economic circumstances;
- Plans for the location, promotion, and expansion of clusters or networks of high technology industries;
- Ensures the most efficient and effective use of land and prioritises the re-use of previously developed land;
- Identifies, protects and promotes key distribution networks, and locates development which generates substantial transport movements in accessible locations;
- Plans for the delivery of sustainable transport and other infrastructure required to support economic growth;
- Where appropriate, safeguards land from other uses in order to meet the needs of future economic development;
- Encourages new uses for vacant and derelict buildings;
- Considers how sites for different business types can be delivered, including through the use of compulsory purchase powers and other planning tools, including Area Action Plans, simplified planning zones and local development orders; and
- Facilitates new working practices such as live/work.

3.06 In terms of planning for established town centres, the statement reiterates much of the guidance set out in the previous PPS6 but introduces, through Policy EC3.1, a requirement for flexible policies to be set for established centres which are able to respond to changing economic circumstances. Furthermore, the same policy also requires local planning authorities to consider establishing floorspace thresholds for the scale of edge-of-centre and out-of-centre development which would need to be subject to an Impact Assessment (as required by Policy EC16.1 of the statement).



3.07 Furthermore, the guidance seeks to encourage local planning authorities to proactively plan to promote competitive town centre environments and enhance consumer choice. Policy EC4.1 states that this should be achieved by:

- Supporting a diverse range of uses which appeal to a wide range of age and social groups;
- Planning for a strong retail mix which meets the requirements of the local catchment area, recognising that smaller shops can significantly enhance the character and vibrancy of a centre;
- Supporting shops, services, and other important small scale economic uses (including post offices, petrol stations, village halls and public houses) in local centres and villages;
- Identifying sites in the centre, or failing that at edge-of-centre, capable of accommodating large format developments;
- Retaining and enhancing existing markets and, where appropriate, re-introducing or creating new ones; and
- Taking measures to conserve and, where appropriate, enhance the established character and diversity of centres.

3.08 As part of the plan making process, PPS4 confirms that local planning authorities should assess the need for future economic development, including retail and town centre uses, and then identify an appropriate range of sites to accommodate the identified need. Policy EC5.1 indicates that, in identifying sites to accommodate future need, the sequential approach to site selection should be applied.

3.09 With regard to the sequential approach, Policy EC5.2 states that the first priority is to identify sites within existing centres which are likely to become available within the plan period, followed by edge-of-centre locations with preference given to sites which are or will be well connected to the centre. Only then should out-of-centre sites be considered, again with preference given to those sites which are or will be well served by a choice of means of transport, and are closest to the centre and have a higher likelihood of forming links.

3.10 Policy EC5.3 states that sites which best serve the needs of deprived areas should be given preference when considered against alternatives with similar location characteristics.



- 3.11 Having identified the necessary sites to accommodate the need required, Policy EC5.4 indicates that the impact of the development of these sites should then be assessed, particularly for development over 2,500 sq.m or for development greater than any locally set threshold.
- 3.12 In seeking to determine planning applications for economic development, PPS4 states that local planning authorities should adopt a positive and constructive approach towards planning applications, and that applications that secure sustainable economic growth should be treated favourably. In seeking to assess planning applications for economic development, Policy EC10.2 states that such applications should be assessed against the following impact considerations:
- Whether the proposal has been planned over the lifetime of the development to limit carbon dioxide emissions, and minimise vulnerability and provide resilience to climate change;
 - The accessibility of the proposal by a choice of means of transport and the effect on local traffic levels and congestion after public transport and traffic management measures have been secured;
 - Whether the proposal secures a high quality and inclusive design;
 - The impact on economic and physical regeneration in the area including the impact on deprived areas and social inclusion objectives; and
 - The impact on local employment.
- 3.13 Where planning applications for economic development are not in accordance with an up to date development plan, Policy EC11.1 states that local planning authorities should weigh market and other economic information alongside environmental and social information, take full account of any long-term benefits as well as the costs, and consider whether those proposals help meet the wider objectives of the development plan.
- 3.14 In dealing with applications for main town centre uses, the most significant change in respect of the previous guidance set out in PPS6, is the removal of the need test. Whilst this could be seen as a significant shift in policy, it must be noted that the guidance still requires the production of an Impact Assessment which would include an assessment of the impact on the trade/turnover in the centre and the wider area, and how this relates to future consumer expenditure capacity in the catchment area defined. Therefore, although on the one hand the guidance suggests that the well established test of need is removed, PPS4 Policy EC16.1 still sets out a requirement to examine the turnover of proposed development and how this would impact upon the trading performance of existing facilities within the defined catchment, which in some cases will be a very similar exercise.



- 3.15 The requirement to apply a sequential approach to development, in order to identify centrally located sites which are available, suitable and viable development prospects, remains and is set out by Policy EC15.1.
- 3.16 Policy EC17.2 states that, where no significant adverse impacts have been identified, planning applications should be determined by taking account of the positive and negative impacts of the proposal, as well as the likely cumulative effect of recent permissions, developments under construction, and completed developments. The statement stresses that judgements about the extent and significance of any impact should be informed by the development plan.

Draft National Planning Policy Framework

- 3.17 It is recognised that PPS4 (along with other such national policy statements) is to be replaced by a single, consolidated National Planning Policy Framework (NPPF) document, a draft of which was published for consultation on 25 July 2011. The NPPF sets out a strong presumption in favour of the grant of planning permission for sustainable development, except where the adverse impacts of development would significantly and demonstrably outweigh the benefits when assessed against the policies in the Framework as a whole. The NPPF also maintains a 'town centre first' approach to retail development and a requirement for such planning applications to demonstrate a sequential approach to site selection.
- 3.18 The draft broadly corresponds with the provisions of PPS4 in respect of retail development. In any event, given its draft status, only limited weight can currently be attributed to it.

Regional Spatial Strategy for the North West – North West of England Plan Regional Spatial Strategy to 2021

- 3.19 Although the Secretary of State announced the revocation of all Regional Spatial Strategies with immediate effect on 6 July 2010, this decision has since been overturned following the legal challenge by Cala Homes and the High Court's ruling of 10 November 2010. The abolition of Regional Spatial Strategies will therefore be achieved through the Localism Act 2011, which received Royal Assent on 15 November 2011. However, at the time of reporting, the relevant part of the Act has not been brought into effect and the Regional Spatial Strategy for the North West (RSS) therefore currently remains to be considered as part of the development plan.



- 3.20 The RSS for the North West was published on 30 September 2008 and provides a framework for development and investment in the region over the next fifteen to twenty years.
- 3.21 Policy DP5 of the adopted RSS seeks to reduce the need to travel and increase accessibility. In this respect, the RSS identifies that development should be located so as to reduce the need to travel, especially by car, and to enable people as far as possible to meet their needs locally. This includes accessibility to range of services and facilities, such as retail.
- 3.22 In making provision for development, Policy RDF1 states that the first priority for growth and development should be the regional centres of Manchester and Liverpool followed then by the inner areas surrounding these regional centres. The third priority should then be the towns/cities within the three city regions of Manchester, Liverpool and Central Lancashire. St Helens is identified as one such town. Policy RDF1 goes on to state that, as part of this third priority, development in larger suburban centres within the city regions will accord with the policy provided the development is of an appropriate scale and is located in proximity to where transport networks connect and public transport accessibility is good.
- 3.23 Retail development is considered by Policy W5. This policy states that:

'Plans and strategies should promote retail investment where it assists in the regeneration and economic growth of the North West's town and city centres. In considering proposals and schemes any investment made should be consistent with the scale and function of the centre, should not undermine the vitality and viability of any other centre or result in the creation of unsustainable shopping patterns.'

- 3.24 Although Policy W5 states that Manchester/Salford and Liverpool City Centre should continue to function as the North West's primary retail centres, comparison retail facilities should be enhanced in a number of identified centres (of which St Helens is one) to ensure a sustainable distribution of high quality retail facilities. Investment, of an appropriate scale, in other centres (such as Earlestown) will be encouraged in order to maintain and enhance their vitality and viability, and to ensure that such centres meet the needs of the local community. In addition, the policy recognises that retail development which supports entrepreneurship, particularly that which increases the number of independent retailers, should be supported.



3.25 Policy W5 also states that there will be a presumption against new out-of-centre regional or sub-regional comparison retailing facilities, requiring local authorities to be pro-active in identifying and creating opportunities for development within town centres. The RSS also identifies that there should be a presumption against large-scale extensions to such facilities (defined as those providing more than 2,500 sq.m net floorspace) unless they are fully justified in line with the sequential approach established in national planning policy. There is no justification for such facilities to be designated as town centres with plans and strategies.

3.26 The supporting text to Policy W5 states that the 25 centres identified are well developed as vibrant centres, particularly for comparison goods retailing which has traditionally been concentrated in town centres, and should continue this role. Paragraph 6.22 of RSS states:

'Recent research points to a significant growth in retail spending in the North West, which will in turn require the provision of additional retail floorspace across the region. The network of centres identified in Policy W5 will be the primary focus for this future growth and development, although they are not the only centres that should receive development through to 2021. The policy does not preclude the investment of resources in other centres, particularly where this will assist in the regeneration of the centre and the wider area. Future reviews of RSS may need to consider the impact of changes to retail formats on the pattern of both convenience and comparison retailing.'

3.27 Paragraph 6.23 of the RSS acknowledges that the flow of expenditure between sub-regions generally reflects the proximity of population to centres in adjoining sub-regions. New investment should promote sustainable shopping patterns, which result in a reduced need to travel, especially by private car, to access retail facilities of an appropriate type and nature.

3.28 Paragraph 6.24 indicates that local planning authorities will have to prepare retail need assessment for their local development frameworks and that specific retail development schemes will also require the preparation of detailed needs assessments.

St Helens Unitary Development Plan

3.29 The current retail strategy for St Helens is set out by the 'saved' policies of the St Helens Unitary Development Plan (UDP), which was adopted in July 1998, with relevant policies being 'saved' to remain part of the statutory development plan by Direction of the Secretary of State in September 2007 under the provisions of the Planning and Compulsory Purchase Act 2004. There are two 'saved' policies of general relevance to future retail provision which are as follows.



- 3.30 UDP Policy RET 1 seeks to direct retail and associated service development to locations within or directly adjacent to the Borough identified shopping centres, where the site benefits from goods access to the highway network, is conveniently located in relation to public transport and pedestrian routes, and benefits from a layout which provides for adequate car parking, cycle parking and servicing arrangement.
- 3.31 Policy RET 2 relates to out-of-centre retail development and indicates that any proposal for large scale retailing (defined as having a gross floorspace of around 1,000 sq.m) development outside an existing centre will be subject to certain criteria, which includes the need for the development to:
- Make a positive contribution to the economic and environmental improvement of the urban area and not undermine the plan strategy;
 - Not cause significant harm to the viability and vitality of any defined shopping centre through the diversion of trade and/or by deterrence of investment;
 - Be readily accessible by both public and private transport;
 - Have demonstrated a sequential approach to site selection;
 - Result in no significant harmful environmental effects or undue loss of amenity to neighbouring residential areas and the surrounding locality; and
 - Have good access to the highway network which allows the satisfactory accommodation of estimated peak flow traffic.

St Helens Local Development Framework Core Strategy

- 3.32 The Council is in the process of preparing a series of Local Development Documents which together will constitute the St Helens Local Development Framework. The suite of documents being prepared includes the Core Strategy, Sustainable Development Development Plan Document (DPD), Allocations DPD, Bold Forest Park Area Action Plan (AAP), St Helens Central Spatial Area AAP, Earlestown AAP and the Proposals Map, which will, on their adoption, replace the policies of the UDP.
- 3.33 The St Helens Re-Publication Core Strategy was placed on consultation between 27 January and 9 March 2011, and was formally submitted to the Secretary of State on 1 June 2011.



- 3.34 Policy CSS 1 sets out an overall spatial strategy for St Helens, which states that the majority of all new development will be directed towards the regional town of St Helens and that St Helens Town Centre will maintain and protect its market share within the region by securing further retail and leisure development opportunities. Policy CSS 1 also indicates that Earlestown will remain the second town centre of the Borough.
- 3.35 St Helens Town Centre lies within the St Helens Central Spatial Area, which the Council wish to see enhanced as an accessible destination for shopping, leisure, culture, tourism, employment and housing, with a high quality built environment. Priorities for development are identified by Policy CAS 2 as being the redevelopment of the existing Tesco superstore site at Chalon Way, the replacement Tesco Extra superstore at the former United Glass site, and the enhancement of the Church Square shopping centre. Policy CAS 2 also indicates that the Council will prepare a St Helens Central Spatial Area Action Plan to direct the location, design, access and phasing of future development within the defined Central Spatial Area.
- 3.36 Policy CAS 3.1 relates to development in Newton-le-Willows and Earlestown and states 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. The supporting text accompanying the policy indicates that the Area Action Plan will seek to address its perceived poor environmental quality and its relative fragility in terms of its vitality and viability.



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 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 in the St Helens area. Notwithstanding this, WYG acknowledges that there can be limitations to survey research, particularly with regard to the size of sample 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 St Helens and Earlestown Town Centres and the identification of the centres' catchment area. To this end, WYG commissioned specialist market researchers NEMS Market Research Limited to undertake a comprehensive household telephone survey to identify consumers' habits and preferences.

Household Telephone Survey

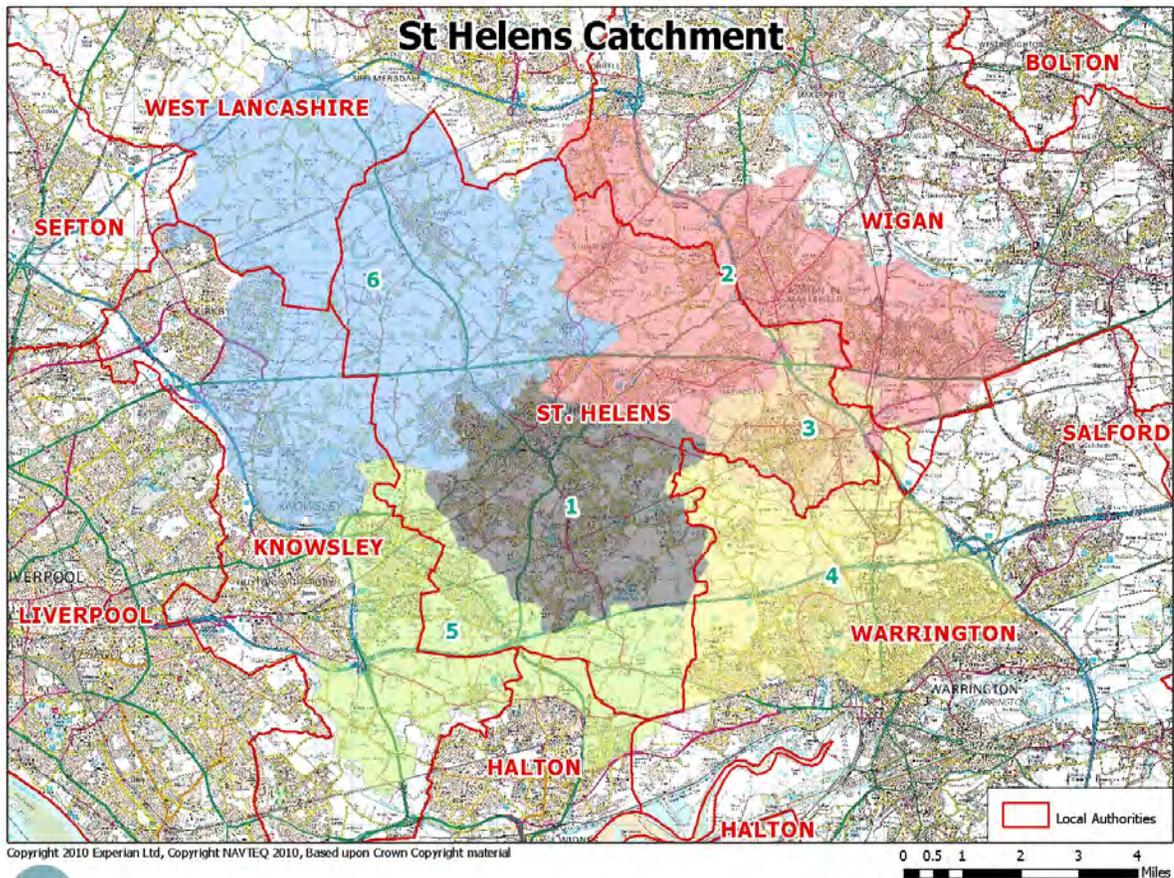
- 4.03 In March and April 2011, a survey of 1,000 households was undertaken within a defined Study Area, derived from that previously used for the 2005 St Helens Retail Capacity Study, but with an amendment in respect of those zones in proximity to Warrington, Widnes, Prescot and Huyton. The household survey undertaken for the 2005 Study indicated that that the flow of expenditure from these peripheral areas to St Helens was limited and it was therefore considered appropriate to revise the catchment boundary accordingly. The catchment is still drawn so as to take into consideration not only St Helens Borough but also adjacent and accessible parts of the Halton, Knowsley, Warrington, West Lancashire and Wigan administrative areas, as residents living in these areas will often naturally gravitate towards conveniently located retail facilities in St Helens. A map of the catchment is provided overleaf at Figure 4.1 and at greater scale at Appendix 1.
- 4.04 The defined catchment has been broken down into six survey zones on a geographic basis (broadly speaking relating to the following areas: central; north east; east; south east; south west; and north west). The zones are numbered 1 to 6 and Table 4.1 sets out the post code areas which define each of the six zones.
- 4.05 The questions and full tabulation of results from the St Helens Household Survey are provided at Appendix 2.



Table 4.1: Post Codes by Survey Zone

Survey Zone	Post Code 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

Figure 4.1: Study Area and Zones





On-Street Survey

- 4.06 To supplement the household shopper survey, NEMS undertook an on-street survey of users of St Helens and Earlestown Town Centres in April 2011. The survey consisted of a total of 250 face-to-face interviews of a random sample of visitors to St Helens (150 interviews¹⁹) and Earlestown (100 interviews).
- 4.07 One of the objectives of the pedestrian survey was to establish the postcode origin of respondents, so as to verify the robustness of the assumed catchment area. Other key questions related to respondents' reasons for travelling to the centre, their mode of travel, the length of their visit, their expenditure whilst visiting the centre, and the strengths and weaknesses of the centre. The tabulated results of the on-street survey are provided at Appendix 3. A summary of the key findings is set out below.

Main Purpose of Visit to the Centre

- 4.08 The single most popular reason to visit both St Helens and Earlestown was to undertake food shopping, with 27% of respondents in St Helens and 50% of respondents in Earlestown making the visit to either undertake a main or 'top-up' food shop (reflecting the relative influence of the Tesco store at Earle Street, Earlestown). The difference in function of each of the town centres was also illustrated by the number of respondents in each centre who visited principally to shop for clothes/shoes, with 17% of those questioned in St Helens suggesting that this was their primary reason to visit, compared to just 1% in Earlestown. St Helens also proved to be a greater draw in terms of visiting the centre to access banking facilities, with 11% in St Helens citing this as being the reason for their visit, compared to 6% in Earlestown.

Table 4.2: Main Purpose of Visit to the Centre

Centre	Top Four Responses – % of Total Responses in Each Centre							
	1		2		3		4	
St Helens	Clothes shopping	17%	Top-up food shopping	14%	Main food shopping	13%	Banking facilities	11%
Earlestown	Top-up food shopping	39%	Main food shopping	11%	Social/leisure activities	8%	Market	7%

¹⁹ Due to respondents terminating interviews part way through, 138 in-street interviews were completed in St Helens.



Mode of Travel to the Centre

4.09 The method of travel to each of the centres differed most significantly in terms of the incidence of visitors who travelled by bus and on foot. In this regard, 39% of visitors to St Helens Town Centre travelled by bus and 16% travelled on foot; this compares to 22% of visitors to Earlestown Town Centre who travelled by bus and 37% who travelled by foot. Clearly, the more local role of Earlestown encourages a proportion of trips by foot. St Helens' important sub-regional role and its relative accessibility by bus – allied to the higher cost of its car parking when compared to Earlestown – appears to have encouraged a larger proportion of journeys to be taken by this mode of transport.

Table 4.3: Mode of Travel to the Centre

	Car	Bus	Walk	Train	Bicycle
St Helens	41%	39%	16%	2%	1%
Earlestown	38%	22%	37%	3%	0%

Spend on Last Visit on Non-Food Shopping

4.10 The typical spend during each visit to the two town centres would appear to be broadly comparable, with 63% of respondents' most recent trips to St Helens and 54% of most recent trips to Earlestown resulting in the sum of all purchases being less than £20. Earlestown – rather unexpectedly, given its more local role – has recorded a greater proportion of visits resulting in purchases totalling more than £100. Whilst this is not considered to be particularly significant, it may be attributable to the influence of the Tesco store and the market where the purchase of the weekly food shop or a 'big ticket' item (in the case of the former) or numerous items (in the case of the latter) may not be uncommon.

Table 4.4: Spend During Last Visit on Non-Food Shopping

	Up to £10	£11 to £20	£21 to £50	£51 to £100	More than £100
St Helens	25%	38%	21%	8%	8%
Earlestown	29%	25%	21%	8%	17%

Reason that the Centre was Chosen for the Visit

4.11 The convenience of each of the centres (i.e. its proximity to the respondents' home) was cited as being by far the greatest influencing factor in the reason that the centre was chosen for that trip. For both centres, around three out of five respondents indicated that its proximity was the key factor in deciding where to visit. For St Helens, the second most cited factor was the provision of services such as banks and, for Earlestown, it was the presence of the market (both of which were cited by 10% of respondents).



Table 4.5: Reason that the Centre was Chosen for the Visit

Centre	Top Four Responses – % of Total Respondents in Each Centre							
	1		2		3		4	
St Helens	Proximity to home	61%	Provision of services (e.g. banks)	10%	Proximity to work	8%	Ease of access	6%
Earlestown	Proximity to home	60%	The market	10%	Choice of non-food shops	6%	Proximity to work and proximity to friends (joint 4 th)	5%

Types of Shop/Service of Which More are Needed

4.12 For both centres, respondents identified that the type of shops or services which would be of greatest additional benefit to the centre would be further clothing stores. However, this answer was cited more frequently by respondents in Earlestown compared to St Helens (57% compared to 28%). The fact that a high proportion of respondents noted that further non-food facilities would improve Earlestown’s offer is reflective of its currently limited non-food retail offer. Whilst respondents identified that the provision of one or more department stores would be of benefit to both centres, this response is considered to be more relevant to St Helens (where the centre’s sub-regional role may reasonably be able to support such facilities), with 23% of respondents suggesting that the centre would benefit from a new department store.

Table 4.6: Types of Shops/Service of Which More are Required

Centre	Top Four Responses – % of Total Respondents in Each Centre							
	1		2		3		4	
St Helens	Clothing stores	28%	Department stores	23%	Footwear stores (joint 3 rd)	12%	Restaurants/cafes (joint 3 rd)	12%
Earlestown	Clothing stores	57%	Footwear stores	34%	Department stores	20%	Household goods stores	19%

Type of Leisure Facilities of which more are needed

4.13 In terms of the leisure uses which would improve the centres, the most frequently cited facility for Earlestown was a cinema (mentioned by 44% of respondents), which is indicative of the lack of any such provision in the town. We note that a perceived need for a children’s activity centre and bowling alley were identified by significant numbers of respondents in both St Helens and Earlestown (13% and 20% of respondents respectively in St Helens, and 22% and 14% of respondents respectively in Earlestown).



Table 4.7: Types of Leisure Services of Which More are Required

Centre	Top Four Responses – % of Total Respondents in Each Centre							
	1		2		3		4	
St Helens	Bowling alley	20%	Children's activity centre	13%	Parks/gardens	11%	Museums	10%
Earlestown	Cinema	44%	Children's activity centre	22%	Bowling alley (joint 3 rd)	14%	Parks/gardens and swimming pool (joint 3 rd)	14%

Measures to Improve the Centre

4.14 A high proportion of respondents in Earlestown were able to identify measures which would improve the centre, with almost half (48%) considering that it would benefit from an increased choice and range of shops. By comparison, almost a quarter (24%) of respondents in St Helens suggested that the centre would benefit from the same improvement. The second and third most popular suggested improvements were the need for a general 'facelift' (9%) and more speciality shops/more entertainment/improved cleanliness (each mentioned by 8% of respondents) in St Helens, and more speciality shops (21%) and improved cleanliness in Earlestown (17%).

Table 4.8: Most Popular Suggested Measure to Improve the Centre

Centre	Top Four Responses – % of Total Respondents in Each Centre							
	1		2		3		4	
St Helens	Increased choice/range of shops	24%	Give it a general 'facelift'	9%	More speciality shops (joint 3 rd)	8%	More entertainment/facilities and improved cleanliness (joint 3 rd)	8%
Earlestown	Increased choice/range of shops	48%	More speciality shops	21%	Improved cleanliness	17%	More entertainment	15%

Biggest Weaknesses

4.15 Similarly, in terms of the centres' biggest weaknesses, respondents tended to be able to identify the same weaknesses with greater frequency in Earlestown as opposed to St Helens. In St Helens, a single weakness was identified by more than 20% of respondents, this being the choice/range of non-food shops (21%). However, in Earlestown, three separate weaknesses were identified by 20% of respondents or more, these being the limited choice/range of non-food shops (48%), the range of independent and specialist retailers (25%), and the general town centre environment (20%).



Table 4.9: Biggest Weaknesses of the Centre

Centre	Top Four Responses – % of Total Respondents in Each Centre							
	1		2		3		4	
St Helens	Choice/range of non-food shops	21%	Range of specialist/independent retailers (joint 2 nd)	7%	Town centre environment (joint 2 nd)	7%	Empty shops	4%
Earlestown	Limited choice/range of non-food shops	48%	Range of specialist/independent retailers	25%	Town centre environment	20%	Leisure facilities	13%

Proportion of Shoppers Visiting the Market

4.16 Given that the Market at Earlestown was not being held on each day that the in-street survey was undertaken, the proportion of shoppers who planned to make a visit to the market has been analysed for St Helens only. In this regard, 47% of all St Helens respondents intended to visit the market at some point during the day.

Table 4.10: Proportion of Respondents who Planned to Visit the Market on the Day of Survey

	Yes	No
St Helens	47%	53%

Biggest Strengths of the Market

4.17 In St Helens, more than a quarter of respondents (28%) cited the biggest strength of the market to be its value for money, followed then by the friendly atmosphere (13%), the quality of non-food items (11%) and the variety of traders (8%). In Earlestown, a third (33%) of respondents were particularly effusive in their praise for the market, stating that its biggest strength was 'everything'. The second most frequently identified strength of Earlestown market was the fact that it provides value for money, which was recognised by 14% of respondents, followed then by the market's friendly atmosphere (13%) and the range of non-food items available (8%).

Table 4.11: Biggest Strengths of the Market

Centre	Top Four Responses – % of Total Respondents in Each Centre							
	1		2		3		4	
St Helens	Value for money	28%	Friendly atmosphere	13%	Quality of non-food items	11%	Variety	8%
Earlestown	Everything	33%	Value for money	14%	Friendly atmosphere	13%	Range of non-food items	8%



Business Survey

4.18 A questionnaire was distributed to all local businesses within St Helens and Earlestown Town Centres to gain an understanding of the views of local operators. In St Helens, a total of 442 questionnaires were distributed, with 90 being returned; in Earlestown, 124 were distributed, with 32 being returned. This equates to response rates of 20% and 25% respectively, which are considered to be broadly typical for this type of research. The complete results of the St Helens and Earlestown Business Surveys are provided at Appendix 4. The principal findings are set out below.

Business Performance

- 31% of respondents in St Helens indicated that their business was a non-food retailer. A further 19% of St Helens respondents were retail services, 15% leisure services, 15% 'other' uses, 9% food retailers, 8% professional services, and 3% charity shops. In Earlestown, the largest single group of respondents comprised leisure services, which included 26% of respondents. Following this, 23% of respondents were leisure services, 19% non-food retailers, 13% food retailers, 13% professional services, and 6% 'other' uses.
- As would be expected, given its more local role, there appears to be a greater proliferation of independent traders in Earlestown, with 87% of respondents describing their business as such, compared to 56% in St Helens. Conversely, 13% of respondents in Earlestown and 38% in St Helens consider their business to be part of a national group or chain. An additional 6% of respondents in St Helens considered their operation to take another form (e.g. charitable trust, Rugby Club shop, public sector, and so on).
- In terms of how long businesses have been established in each of the centres, 34% of respondents in St Helens had traded in the centre for 20 years or more, with 28% being in operation between 11 and 20 years, and 23% between 6 and 10 years. In Earlestown, an even greater proportion of respondents had been in business 20 years or more (45%), with 19% having traded for between 11 and 20 years, and 6% for between 6 and 10 years.
- A clear majority of respondents at both centres leased their premises (75% in St Helens and 71% in Earlestown).
- During their time in St Helens, 44% of respondents indicated that their businesses had either declined moderately or declined significantly, 19% stated that business had remained largely static, and 37% stated that trade had grown moderately or significantly. In Earlestown, 45% of respondents reported that business had either declined moderately or significantly, 23% indicated that it had remained largely static, and 32% stated that it grown moderately or significantly.



Retail Improvement Measures

- The survey indicated that in St Helens 32% of traders relied upon residents from in or around St Helens Town Centre for the majority of their business, with a further 31% principally relying on trade from residents from across the Borough. In Earlestown, 49% of traders indicated that trade was principally derived from residents of the Earlestown/Newton-le-Willows area (reflecting the centre's relatively local role), with a further 17% suggesting that business is predominantly derived from across the Borough.
- When asked about measures that would improve St Helens Town Centre, 81% of respondents suggested that an increased choice/range of shops would have this effect, 73% indicated that a new department store or lower parking charges would improve the centre²⁰, and 58% suggested an improvement in public toilet provision. With regard to Earlestown Town Centre, 87% of respondents suggested that an increased choice/range of shops would have a positive beneficial effect, 84% indicated that greater marketing/promotion of the centre would do the same, and 65% suggested the introduction of more independent/specialist traders.
- Only 33% of respondents in St Helens and 25% of respondent in Earlestown considered that the centres had a good existing balance between shops and non-retail uses, with around half (48% in St Helens and 50% in Earlestown) considering there to be too many non-retail uses. A smaller proportion of respondents in both of the centres considered there to be too many retail uses (20% in St Helens and 25% in Earlestown).
- Respondents in St Helens Town Centre identified the main barriers to a strong trading performance as being the price of car parking (57%), the poor quality of the town centre environment (54%), high rents and overheads (52%), and the lack of passing trade (also 52%). In Earlestown Town Centre respondents suggested that the poor quality of the environment (74%), the lack of day visitors to the town (71%), the lack of passing trade (58%), and high rents and overheads (42%) were the greatest barriers to a strong trading performance.
- In St Helens, 43% of respondents indicated that they had no plans to alter their business in any way over the next five years, with 15% planning to expand their range of products and 9% planning to refurbish their existing floorspace. In Earlestown, 30% of traders suggested that they had no plans to alter their business over the next five years, 22% indicated that they intend to expand their product range and 14% stated that they intended to relocate to another centre.

²⁰ In considering the proportion of respondents who indicated that the centre would be improved by lower car parking charges, it is relevant to note that research by Virgin Money Car Insurance found St Helens to be the UK's most 'car friendly town' in 2011. The cost of car parking is one criterion considered in undertaking the research, which suggests that charges are not notably above what would be expected for a town the size of St Helens. WYG's own observations visiting St Helens and other nearby towns performing a similar role corroborate this view.



- Warrington was considered to be St Helens' biggest competitor by the largest proportion of respondents, followed by Wigan and then Widnes. In Earlestown, respondents identified St Helens to be the centre's biggest competitor, followed by Warrington and then Ashton-in-Makerfield.

Internet Shopping

- 67% of respondents in St Helens and 40% of respondents in Earlestown indicated that their business currently has its own website.
- Of those St Helens respondents whose business does have a website, the main services provided were contact information (83%), the ability to browse goods (61%), the ability to contact the business directly via e-mail (41%), and the ability to order goods directly from the website (39%). Of those businesses in Earlestown with a website, the main services provided were again contact information (100%), the ability to browse goods (42%), the ability to order goods directly from the website (42%) and the ability to contact the business via email (33%).
- Over half (55%) of respondents in St Helens stated that their website was either 'very important' or 'essential' to their business. A further 14% felt that their website was 'important' to their business and 31% stated that it was 'fairly important' or of 'little importance'. In Earlestown, 50% of respondents considered their website to be either 'very important' or 'essential' to their business, 25% felt it to be 'important' to their business and 25% stated that it was only 'fairly important' or of 'little importance'.
- 80% of businesses in St Helens and 73% of businesses in Earlestown with an internet presence indicated that their website attracted custom from outside the wider St Helens area.
- 73% of businesses in St Helens and 55% of businesses in Earlestown with an internet presence stated that customers make visits to their store after browsing the website.
- A significant majority of respondents (80% of St Helens businesses and 67% of Earlestown businesses) indicate that less than 25% of their sales are generated via the internet.
- Of those businesses based in St Helens which do not have a website, the main reasons given for the lack of internet presence were the fact it is not relevant/necessary (27%) and that the business does not have the skills required to produce or update a website (20%). In Earlestown, the principal reasons provided by businesses were that a website is not relevant/necessary (50%) and that they were in the process of designing a website (19%).

Strengths and Weaknesses of the Town Centres

- The business survey asked respondents to rate a number of different aspects of their respective centre in terms of whether they were considered to be 'good', 'average' or 'poor'. The majority of



aspects were rated as being 'average' by the largest proportion of respondents. However, a number of aspects were rated as being 'poor' by the greatest proportion of respondents.

- For St Helens, these aspects were: vehicular access to the town centre (with 51% of respondents deeming this to be poor); the amount of car parking (43%); the price of car parking (50%); the number of shops (49%); the range of shops (65%); the number of restaurants (44%); the market (47%); the amount of events which take place in the centre (50%); the range of these events (47%); the amount of marketing and promotion of the centre (55%); the range of marketing and promotion (60%); and, the image of the centre (58%).
- For Earlestown, aspects of the town centre considered to be poor by the highest proportion of respondents were: the appearance of entrances to the centre (65%); the amount of car parking (45%); the number of shops (68%); the range of shops (77%); the number of high street multiple traders (45%); the attractiveness of the public realm (52%); the cleanliness of the public realm (42%); the number of events which take place in the town centre (65%); the range of these events (68%); the amount of marketing and promotion of the centre (84%); the range of marketing and promotion (87%); and, the image of the centre (87%).
- A majority of respondents failed to identify any one characteristic of St Helens as being 'good'. In Earlestown, the following aspects were scored as being good by the greatest number of respondents: accessibility by public transport (45%); the pricing of car parking (52%); the number of service uses (45%); and, the number of fast-food outlets (61%).

Earlestown Market Traders Survey

- 4.19 The business survey was supplemented by an additional survey which sought to identify particular issues relating to Earlestown market and the difficulties traders may experience in running their business. The survey was undertaken by officers of St Helens Council on a face-to-face basis in March 2011 and the principal findings are reported below.

Variety of Traders

- 4.20 In total, 32 businesses agreed to be interviewed for the survey; the composition of these businesses is summarised in Table 4.11 below. Whilst there is a relatively wide range of items traded from Earlestown market, certain goods categories, which would generally be expected to be bought from a market, are particularly well represented. In this regard, the three most popular goods types traded from the market are clothes and footwear (which account for 31% of traders who participated in the survey) and household goods and food (both of which account for 16% of traders).



Table 4.12: Types of Goods Traded from Earlestown Market

CDs, Books etc.	Chemist/Beauty	Clothes	DIY	Electrical	Food	Furniture	Household	Recreation	Total
13%	6%	31%	9%	3%	16%	3%	16%	3%	100%

Length of Time Trading in Earlestown Market

4.21 In general, traders seem to either be very well established at the market or relatively new to Earlestown. As can be identified from Table 4.13, 29% of traders haven been operating from Earlestown market for less than two years, whereas 39% have traded from the market for more than 10 years.

Table 4.13: Length of Time Trading from Market

Up to 6 months	6-12 months	1-2 years	2-5 years	5-10 years	10-20 years	20+ years	Total
10%	6%	13%	19%	13%	13%	26%	100%

Performance of Earlestown Market and the Trader's Business

4.22 Market traders were asked two separate questions relating to the performance of the market over time and the performance of their business. In responding to each question, a majority considered that both general footfall and their own trade had declined since they commenced trading at the market. However, it is evident that a greater number of respondents considered that the market as a whole had suffered from less visitors, relative to the number of traders who considered that their own trade had declined.

Table 4.14: Performance of Earlestown Market Over Time

Declined significantly	Declined moderately	Largely static	Grown moderately	Grown significantly	Fluctuates	Total
56%	28%	6%	8%	0%	3%	100.0%

Table 4.15: Performance of Trader's Own Business Over Time

Declined significantly	Declined moderately	Largely static	Grown moderately	Grown significantly	Fluctuates	Total
32%	35%	13%	16%	3%	0%	100%

Trader's Current Performance and Aspirations

4.23 Traders were questioned about their current performance and whether they intended to trade from Earlestown in the future. Only one on five traders adjudged their current performance to be poor,



with 63% stating that they were performing moderately, and 17% indicating that they were performing well. In terms of their future aspirations over the next five years, a very large majority (88%) expressed their intention to continue to trade from Earlestown, with 6% stating that they intend to retire, 3% indicating that they planned to relate their stall to alternative Friday market, and a further 3% (representing a single respondent) expressing the pessimistic belief that the market will close over the five year time period.

Table 4.16: Traders' Current Performance

Poor	Moderate	Good	Total
20%	63%	17%	100%

Table 4.17: Traders' Aspirations Over the Next Five Years

Continue to trade from Earlestown	Relocate	Retire	'Market will close'	Total
88%	3%	6%	3%	100%

Earlestown Market's Strengths and Weaknesses

4.24 Traders were asked about a range of factors relating to the market and whether they judged such aspects to be 'good', 'average' or 'poor'. Whilst the responses indicate Earlestown market's strengths, with a large majority rating its location (97%), cleanliness (78%) and the variety of traders (67%) as being good. Only two factors were identified by more than one third of respondents as being poor, these being the marketing and promotion of the market (52% stating this to be poor) and the storage and servicing facilities (36%).

Table 4.18: Rating of the Market

Characteristic	Good	Average	Poor	Total
Appearance of Stalls	33%	50%	17%	100%
Appearance of Street	35%	48%	16%	100%
Number of Traders	35%	32%	32%	100%
Variety of Traders	67%	30%	3%	100%
Location in Earlestown	97%	3%	0%	100%
Marketing and Promotion	17%	31%	52%	100%
Cleanliness	78%	9%	13%	100%
Support Services	40%	33%	27%	100%
Storage and Servicing	36%	29%	36%	100%



5.0 Assessment of the Vitality and Viability of St Helens and Earlestown Town Centres

Introduction

5.01 PPS4 emphasises the importance of maintaining a 'healthy' town centre as it helps to foster local pride and local identity, and can contribute towards the aim of sustainable development. PPS4 also states that by monitoring town centres on a regular basis, signs of decline can be identified early.

5.02 Annex D of PPS4 sets out a number of indicators which can be used to ascertain the relative health of a particular centre. The indicators comprise the following:

- Diversity of main town centre uses (by number, type and amount of floorspace);
- The amount of retail, leisure and office floorspace in edge-of-centre and out-of-centre locations;
- The potential capacity for growth or change of centres in the network;
- Commercial operator representation and intentions to change representation;
- Shopping rents;
- Proportion of vacant street level property;
- Commercial yields on non-domestic property (i.e. the capital value in relation to the expected market rental);
- Land values and the length of time key sites have remained undeveloped;
- Pedestrian flows;
- Accessibility;
- Customers' and residents' view and behaviour;
- Perception of safety and occurrence of crime; and
- State of the city/town centre environmental quality.

5.03 Appropriate consideration of each of these factors (where detailed and up to date data allows) and our observations in visiting both town centres is principally provided through the detailed health check assessments which comprise Appendix 5 of this study. An appraisal of customers' and residents' views is provided by the previous section of this report. These surveys identified some concern as to the variety of non-food shopping provision in the centres – particularly in Earlestown – and the relative lack of specialist and independent retailers. However, in St Helens at least, only a handful of perceived weaknesses were identified by numerous respondents, which suggests that the centre is subject to few issues which act to significantly impair its enjoyment by shoppers. In Earlestown, the



survey responses clearly identify the market as being key to the town centre's future vitality and viability.

- 5.04 The commentary below provides an overview of our analysis of the health of both town centres, with particular reference to their performance over time. In this regard, we compare the two centres' current performance to that identified by the previous 2005 Study. The summary provided below considers the performance of St Helens and Earlestown in turn, but should be read in conjunction with the detailed health checks.

St Helens Town Centre

Position within the Retail Hierarchy

- 5.05 The previous 2005 St Helens Retail Capacity Study identified the position of St Helens in the hierarchy of town centres using the Management Horizons Europe's (MHE) UK Shopping Index 2003/2004. The centre was ranked 92nd out of 1,672 shopping venues surveyed nationally, an improvement of 19 places from its earlier ranking of 111th in 2000/2001. However, since the previous Retail Study was undertaken, the most recent data from MHE has identified that the ranking of St Helens has declined, with the town centre being ranked as 118th in 2008.
- 5.06 The MHE data has since been superseded by Venuescore's UK Shopping Venue Rankings which identified that St Helens has experienced a decline in its rankings from 126th position in 2007 to 135th position in 2010. Whilst, in our experience, rankings can fluctuate year on year without the manifestation of any significant underlying issues, the decline in St Helen's ranking may be attributable to its failure to add significantly to its town centre offer in recent years, whilst some other nearby centres have managed to do so, namely Liverpool City Centre with the Liverpool One development, Wigan with Grand Arcades, and Warrington with Golden Square. Notwithstanding this, the fall in ranking over a relatively short period is not considered to be of particular concern, as relatively small changes in performance can often have a notable effect on the ranking of the centre.

Diversity of Uses

- 5.07 A direct comparison between the current diversity of uses in St Helens Town Centre and that evident at the time of the previous Retail Study is not possible due to changes in the town centre boundary, as defined by Experian Goad. As a result of the amendments to the centre as considered by Experian Goad, the total number of units in St Helens has increased significantly from 355 units in 2004 to 439



units in 2011, with an increase in the amount of floorspace in the town centre from 90,042 sq.m in 2004 to 116,390 sq. m in 2011 (excluding those units classified as 'miscellaneous').

Table 5.1: Diversity of Use by Unit in St Helens Town Centre

	No. of Units (2004)	% of Units (2004)	No. of Units (2011)	% of Units (2011)
Convenience	38	10.7%	39	8.9%
Comparison	178	50.1%	136	31.0%
Services	110	31.0%	208	47.4%
Vacant	29	8.2%	56	12.8%
Total	355	100.0%	439	100.0%

Retailer Representation

5.08 WYG noted in the 2005 Retail Capacity Study that St Helens Town Centre accommodated 166 multiple retailers, including 18 'key attractors' which were most likely to improve the consumer appeal of a centre because of their strong branding or comprehensive product mix, including Boots, Marks & Spencer and Woolworths. It was also noted that the majority of the independent retailers were located in units within the secondary shopping areas of the town centre.

5.09 More recently, and in line with the wider national high street trends, a number of multiple retailers have ceased trading in St Helens, notably Woolworths and TJ Hughes. The closure of these stores in December 2008 and August 2011 has resulted in a significant amount of vacant floorspace in the Hardshaw Centre, with TJ Hughes previously being the largest department store in St Helens. The closure of TJ Hughes has also significantly reduced the amount of comparison goods floorspace in the town centre. Despite these closures, St Helens still provides reasonable representation from national retailers. The town centre, for example, contains 11 of the 'Top Twenty Retailers' (as identified by Focus in 2009), including Argos, BHS and Superdrug, with the Ravenhead Retail Park on the outskirts of St Helens accommodating other key retailers, including B&Q, JJB and Next.

Intentions to Change Retailer Representation

5.10 The surveys of St Helens businesses in 2005 and 2011 identified that approaching half of all retailers had no plans to change their business in any way during the next five years (recorded as being 45.0% and 42.9% of respondents, respectively), with only a small percentage seeking to close their store (2.5% in 2005, increasing to 3.3% in 2011). There has been a slight decline in the percentage of businesses seeking to relocate either to alternative premises in St Helens Town Centre or to out-of-centre locations, with a significant reduction in the number seeking to extend their trading floorspace



(from 12.5% to 1.1% in 2011). It should be noted that the 2011 business survey also recorded two additional responses, namely whether the retailers were currently seeking to expand the range of products sold (15.4% of businesses) and if they were seeking to relocate to another town centre (6.6%).

5.11 As Table 5.2 below indicates, since 2005 there has been a marked decline in confidence of the retailers in the town centre, with the percentage of respondents who noted that their business was performing either very well or well decreasing from 51.3% in 2005 to only 18.9% in 2011.

Table 5.2: Business Survey Results

How is your business performing?	2005 Business Survey	2011 Business Survey
Very well	10.3%	2.2%
Well	41.0%	16.7%
Moderately	41.0%	50.0%
Poorly	7.7%	31.2%
Total	100.0%	100.0%

Note: The 2005 business survey only asked respondents if their business was performing 'poorly', whilst the 2011 survey asked if their business was performing 'poorly' (25.6%) or 'very poorly' (5.6%)

5.12 The business surveys of 2005 and 2011 allowed the respondents the opportunity to put forward their views on the main threats experienced by their store, though as the wording of the responses varied between the two surveys, a direct comparison between the data is not possible. The principal issues of concern raised in both 2005 and 2011 related to an apparent inadequate level of customer car parking, an overall lack of day visitors or tourists to St Helens, and the high rents/overheads of the business. Other issues noted include the lack of footfall outside the business premises, poor security, and the poor quality of the town centre shopping environment.

5.13 The 2011 survey allowed the respondents to note their general comments on St Helens, with a high number of individuals making reference to the town centre containing too many take away units and discount stores. Other issues of concern relate to the lack of free parking in the town centre, with many businesses noting that the current parking restrictions are dissuading shoppers from visiting St Helens. A number of respondents also noted that the town is currently lagging behind other centres which are perceived to be more vibrant, such as Widnes and Warrington, with additional inward investment needed to ensure that St Helens can effectively compete with these neighbouring areas.



Retailer Requirements

- 5.14 The number of retailers seeking to locate in St Helens Town Centre has decreased significantly from the previous Study which identified a total of 36 retailer requirements listed in October 2004, including La Senza, Carphone Warehouse and Peacocks. In March 2011, only five retailers were seeking representation within St Helens, including Linen Warehouse and Costa. Whilst the reduction in retailer demand is significant, it is broadly reflective of general economic climate being experienced nationally and should therefore not be taken to demonstrate a particular weakness in retailer demand in St Helens Town Centre.

Vacancies

- 5.15 The 2005 Retail Capacity Study identified 29 vacant units in St Helens Town Centre, representing 8.2% of all retail units. Our site visit in March 2011 identified a total of 56 vacancies within the redefined Goad boundary, with these units representing 12.8% of all units and comprising a total of 13,800 sq.m of vacant floorspace. The percentage of units and amount of vacant floorspace was noted as being below the national average figure in 2005. Conversely, the site visit in March 2011 identified that St Helens had an above average percentage of vacant units and floorspace in comparison to the UK average. Of particular relevance is the fact that the largest vacant unit – 17 King Street, which has a gross floorspace of 2,620 sq.m – has remained vacant since November 2009, with the former Woolworths store on Church Street also vacant at the time of survey. Whilst the majority of the former Woolworths unit is now occupied by 99p Stores, the 2,850 sq.m former TJ Hughes unit has been vacated since the undertaking of the survey.

Commercial Rents and Yields

- 5.16 The 2005 Study noted that average Zone A rental values, as provided by Focus, had increased steadily between 1996 and 2000, with levels then remaining static to 2005. Subsequently, Zone A rents have remained relatively stable, with moderate increase recorded from June 2007.
- 5.17 The retail yields of St Helens have also decreased slightly from 7.00% in 2005 to 6.25% in 2007. The most recent figures from the Valuation Office Agency identified a yield of 6.50% in July 2008, which may suggest increased investor confidence in the town centre.

Pedestrian Flows

- 5.18 Neither this nor the 2005 Retail Study have been informed by commissioned pedestrian counts. However, the previous Study did make reference to the investment which had at that time recently taken place in the town centre, including new street paving, soft landscaping and street furniture, which were considered to provide a safe and inviting area for shoppers. St Helens remains a relatively



popular and relatively busy town centre with strong levels of pedestrian activity noted throughout the central shopping area.

Earlestown Town Centre

Position within the Retail Hierarchy

- 5.19 The retail ranking of Earlestown, based on Venuescore’s UK Shopping Venue Rankings, identified that the ranking of the town centre had declined by 179 places between 2007 and 2010, from 1,134th to 1,313th position. However, this fall in ranking is considered to be relatively minor, particularly as relatively small changes in performance can have a notable effect on the ranking of the centre.

Diversity of Uses

- 5.20 The diversity of use figures for Earlestown have been based on the same shopping town centre area boundary, therefore comparisons can be made between the previous Study data and this report.

Table 5.3: Diversity of Use by Unit in Earlestown

	No. of Units (2004)	% of Units (2004)	No. of Units (2011)	% of Units (2011)
Convenience	11	9.2%	11	9.1%
Comparison	40	33.3%	34	28.1%
Services	55	45.8%	60	49.6%
Vacant	14	11.7%	16	13.2%
Total	120	100.0%	121	100.0%

- 5.21 Overall, whilst there has been no change in number of convenience units, there has been an increase in both the number of service units and vacant units between 2004 and 2011. There has also been a decline in both the number and amount of comparison goods floorspace, with Earlestown identified as being increasingly under-represented in such retailers when compared to national average figures.

Retailer Representation

- 5.22 The 2005 Study had noted that the majority of units within Earlestown were independent operators, with reference made to a modest representation from other regional and national retailers and businesses including Barclays, Boots, Max Spielmann, Savers, Somerfield, Tesco and Woolworths. The Study identified that the market in the centre of the town acted as the main attractor for shoppers to Earlestown.



5.23 Whilst the majority of units in the centre continue to be operated by local retailers, national operators are still important for attracting shoppers to Earlestown. Our survey of the centre has identified that, since the undertaking of the previous Study, a number of the multiple stores have been taken over by new operators, including the former Woolworths store which is now Heron Foods, the former Somerfield store which now operates as Wilkinson, the Savers store which is now a Superdrug, and most recently, the Netto store which opened as a Morrisons foodstore in May 2011. Three units which previously accommodated national operators in Earlestown centre are now vacant, namely the former Johnsons dry cleaners, Max Spielmann and the Halifax estate agent.

Intentions to Change Retailer Representation

5.24 The previous 2005 Retail Study noted that almost half of business survey respondents (45.5%) stated that they had no plans to alter their business in any way during the next five years, 27.3% indicated that they would refurbish their existing unit, and 9.1% stated that they planned to close the business or re-locate out-of centre. The 2011 business survey identified a number of variations, particularly in respect of the fact that a reduced percentage of businesses did not plan to alter their business over the next five years (29.7%). A high number of respondents stated that they would expand the range of products traded (21.6%) or relocate to another town centre (13.5%).

5.25 Since 2005, there has been a marked decline in confidence of the retailers in Earlestown, with the percentage of respondents who noted that their business was performing either very well or well, as noted in Table 5.4, decreasing from 34.4% in 2005 to 29.0% in 2011.

Table 5.4: Business Survey Results

How is your business performing?	2005 Business Survey	2011 Business Survey
Very well	6.3%	3.2%
Well	28.1%	25.8%
Moderately	30.6%	38.7%
Poorly*	25.0%	32.3%
Total	100.0%	100.0%

Note: The 2005 business survey only asked respondents if their business was performing 'poorly', whilst the 2011 survey asked if their business was performing 'poorly' (25.6%) or 'very poorly' (5.6%)

5.26 The business survey in 2005 and 2011 allowed the respondents the opportunity to put forward their views on the main threats felt by their business, with the two key issues identified during both surveys relating to a lack of day visitors/tourists to the town (noted by 14.9% of respondents in 2005 and 16.7% in 2011) and a poor quality town centre shopping environment (noted by 13.5% in 2005 and



17.4% in 2011). Other important issues which were noted include the lack of passing trade outside business premises and high rents/overheads.

Retailer Requirements

- 5.27 A Focus report, which would provide details of the retail requirements of the town centre, is not available for Earlestown. However, given the general difficult economic conditions and the fact that there are a number of vacant units in the centre, we consider it likely that current retailer requirements for the centre are limited.

Vacancies

- 5.28 The 2005 Study stated that there were 14 vacancies in Earlestown, representing 11.4% of all town centre units. The site visit in March 2011 identified that there had been a slight increase in the number of vacant units within the defined Goad town centre boundary to 16, with these units representing 13.2% of all stores and comprising a total of 1,530 sq.m of vacant floorspace. The percentage of units and amount of vacant floorspace was noted as being above the national average figures in both 2005 and 2011.
- 5.29 The location of the vacant units, as noted in the 2005 Study, are dispersed throughout the centre, with a surprisingly high number of vacancies continuing to be located within the primary shopping area on Market Street. These units are considered to detract from the overall environmental quality of Earlestown.

Commercial Rents and Yields

- 5.30 We again note that a Focus report, which would provide relevant Valuation Office Agency data, is not available for Earlestown.

Pedestrian Flows

- 5.31 Once again, neither this nor the 2005 Retail Study have been informed by commissioned pedestrian counts. The previous Retail Study did make reference, however, to the pedestrianised sections of Market Street and the traffic calming measures which were in operation throughout the rest of the centre. The site visit in March 2011 identified a relatively high level of pedestrian activity on Market Street, with a concentration of pedestrian movement at the outdoor market on Market Square. It was also noted that the presence of regular pedestrian crossings and bollards which help to prevent vehicular access have successfully helped to aid movement on foot for shoppers around centre.



Summary

- 5.32 St Helens and Earlestown Town Centres both retain an important retail and service role. However, a number of the health check indicators suggest some decline in the centres' performance over the period 2005 to 2011.
- 5.33 With regard to St Helens, since the previous Retail Study reported in 2005, the centre has dropped down the retail rankings to 135th position (which will occur when a town fails to significantly add to its retail offer, whilst other centres do); it has fewer comparison goods retailers; fewer outstanding retailer requirements; and a greater number of vacancies.
- 5.34 However, it is important to recognise that such characteristics, to some extent, are attributable to the performance of the economy as a whole and will be apparent in many other centres across the North West and beyond. Furthermore, whilst the vacancy rate is above national average, it is not yet at a level which yet causes particular alarm. It is considered that the centre's future health will be linked to the delivery of appropriate large-scale retail floorspace which meets the needs of modern retailers, such as that planned at Chalon Way, and the Council will need to carefully monitor the progress of this committed scheme in formulating its future strategy for the town centre.
- 5.35 The situation is similar in Earlestown Town Centre, with a reduction in retail ranking over recent years; a reduction in the provision of comparison goods floorspace; and a (relatively modest) increase in the number of vacancies. Again, such changes are not yet of a level which suggests any significant deterioration in Earlestown's role since the undertaking of the last retail study. However, given the more limited role, function and range of over of Earlestown, its future vitality and viability is particularly vulnerable to any significant retail provision proposed within this part of the Borough. The future impacts of any such development would need to be carefully considered in judging proposals' merits. The future health of Earlestown is also considered to be closely linked to the ongoing success of its market.



6.0 Household Survey

Introduction

- 6.01 The results of the household survey are utilised in estimating the market share claimed by each existing retail facility within the Study Area, a process which is considered in Section 7 of this report.
- 6.02 The household survey is also of assistance in identifying broad shopping patterns, including the frequency of visit, the incidence of linked trips, the most popular means of accessing town centre facilities, the use of other town centre facilities, and so on. The key findings of the survey are set out below, with reference to the results gathered in support of the Borough-wide retail studies of 2000 and 2005. These earlier surveys utilised a sample of 750 and 1,000 households respectively, albeit across a slightly different catchment area; the 2011 household survey has purposely reduced the southern part of the catchment area as previously surveys have demonstrated that households in this location do not look to St Helens and Earlestown to provide for their retail needs. In summary, and with reference to the zones used by the 2005 Retail Study, the amendments comprise: Zones 4 and 5 have been reduced in size along their southern boundary; Zone 6 has been subsumed into Zone 5; and Zone 7 has been renamed Zone 6. Accordingly, the zones which remain unaltered and which bear direct comparison with previous household surveys are Zones 1, 2 and 3 (with Zone 6 being directly comparable to the previous Zone 7). The large majority of the population of the St Helens administrative area are resident in Zones 1, 2 and 3.
- 6.03 It should be noted that the shopping patterns analysis provided in this section relates to the proportion of trips made to each retail destination and does not take into consideration the expenditure committed at the destination. A consideration of expenditure market share (i.e. the proportion of overall available expenditure which is committed at each destination) follows at Section 7.
- 6.04 It should also be noted that the analysis relates to physical trips and that internet spending and other forms of special forms of trading²¹ have been 'stripped out' from the data. For information, the level of purchases recorded as being committed through special forms of trading for each main goods category is as follows.

²¹ Special forms of trading comprise 'non-store retailing', including internet sales, TV shopping and so on.



Table 6.1: Market Share of Special Forms of Trading – Convenience (2011)

Zone	Market Share (%)	
	Main Convenience	'Top-Up' Convenience
Zone 1	0.9	0.6
Zone 2	1.0	0.0
Zone 3	1.1	0.0
Zone 4	2.8	0.0
Zone 5	2.0	0.0
Zone 6	1.0	0.0
Total	1.6	0.1

Source: Derived from March 2011 Household Survey
Based on proportion of purchases

Table 6.2: Market Share of Special Forms of Trading – Comparison (2011)

Zone	Market Share (%)							
	Clothing & Footwear	Books, CDs, etc.	Household Goods	Toys, etc.	Chemist	Electrical	Furniture	DIY
Zone 1	4.2	28.6	5.7	11.2	2.8	8.3	1.4	0.6
Zone 2	2.6	26.0	8.1	12.3	0.5	10.3	2.9	0.6
Zone 3	5.2	20.7	7.2	16.1	4.1	10.0	1.5	1.4
Zone 4	4.3	30.5	5.1	11.6	1.0	14.0	2.0	0.0
Zone 5	4.1	38.4	4.6	11.9	2.1	13.0	2.8	0.8
Zone 6	2.1	23.9	4.4	11.8	0.0	13.0	0.0	0.0
Total	3.7	29.0	5.8	12.0	1.6	11.4	2.0	0.5

Source: Derived from March 2011 Household Survey
Based on proportion of purchases

Main Food Shopping Patterns

- 6.05 Whilst it is evident from comparison of the previous household surveys that convenience stores within the Borough of St Helens witnessed a relatively sharp decline in main food market share between 2000 and 2005, this trend was to some extent reversed between 2005 and 2011. In particular, there was a very strong increase in the market share of St Helens Borough's facilities in Zone 2 – with the Borough's retention of main food shopping trips rising from just 29% in 2005 to 52% in 2011 – and, to a lesser degree, in Zone 3, which was the subject of a nine percentage point rise to 69%. Conversely, the market share of St Helen's food shopping facilities claimed from expenditure which originates in Zone 1 has fallen from 93% in 2005 (and, before that, from 95% in 2000) to 89%.
- 6.06 The increase in market share in Zones 2 and 3 is principally attributable to the improved food shopping offer in Haydock and Earlestown, in particular in the form of the two Tesco stores which



opened subsequent to the undertaking of the 2005 Study household survey. The market share of expenditure originating in Zone 1 appears to have been diluted slightly by recent improvements in food shopping facilities elsewhere, most notably the opening of the large Tesco Extra store at Cables Retail Park in Prescot and the extension to the Marks & Spencer store at Gemini Retail Park in Warrington.

Table 6.3: Main Food Market Share Analysis – 2000, 2005 and 2011

Year	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Total
2000	95%	45%	70%	12%	8%	29%	81%	40%
2005	93%	29%	60%	4%	5%	15%	59%	33%
2011	89%	52%	69%	5%	31%	69%	-	49%

Top-Up Food Shopping Patterns

6.07 The market share of top-up shopping achieved by convenience retailers in St Helens appears to have risen sharply since the undertaking of the last survey, with the two zones which are almost wholly located within the St Helens administrative area – Zone 1 and Zone 3 – achieving market shares of 98% and 91% respectively. Whilst such high market shares suggest an improvement in the performance of the Borough’s foodstores, some of this apparent growth may be attributable to an improved and more precise survey methodology, as it is to be expected that most households would undertake occasional food retailing locally. Accordingly, whilst high, the level of market share achieved in Zones 1 and 3 is considered credible and appropriate.

6.08 For the same reason, the limited market share recorded in Zone 4 and Zone 5 is also considered to be robust (and not problematic), given that the majority of these zones are located within Warrington and Knowsley respectively.

Table 6.4: Top-Up Food Market Share Analysis – 2000, 2005 and 2011

Year	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Total
2000	66%	54%	85%	0%	3%	23%	68%	35%
2005	79%	35%	50%	6%	1%	23%	27%	31%
2011	98%	58%	91%	5%	27%	78%	-	55%

Non-Bulky Comparison Shopping Patterns

6.09 It should be noted that the previous retail studies have, for comparison goods, assessed the market share of St Helens Town Centre and its adjacent retail parks, but that in order to provide consistency



with the convenience goods shopping analysis, we again below consider the market share attracted to facilities located within the whole of St Helens Borough. Notwithstanding this revision in methodology, given that the vast majority of the Borough’s significant comparison goods retailers are located either in the town centre or in nearby retail parks, the 2011 market share is considered to bear broad comparison with that previously reported.

6.10 St Helens Borough attracts 40% of all shopping journeys to purchase non-bulky comparison goods items which originate from within the catchment. As indicated by the below Table 6.5, although significant variation exists across the Study Area, Zone 1 is the single zone where St Helens Borough’s facilities attract more than half of all such shopping journeys (actually claiming 75% of such trips). This represents a six percentage point increase in comparison to the share identified by the 2000 and 2005 studies, which may be attributable to the aforementioned revision in our approach. St Helens attracts at least 40% of all non-bulky shopping trips in Zones 2, 3 and 6, but only 4% of such journeys in Zone 4 (which affords excellent access to Warrington Town Centre). Across the whole of the Study Area, Warrington is the second best performing town centre, attracting 24% of non-bulky shopping journeys, with Liverpool attracting 5% of such journeys.

Table 6.5: Non-Bulky Comparison Goods Market Share Analysis – 2000, 2005 and 2011

Year	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Total
2000	69%	25%	46%	3%	13%	34%	48%	30%
2005	69%	23%	37%	12%	10%	24%	36%	27%
2011	75%	40%	48%	4%	29%	55%	-	40%

Bulky Comparison Shopping Patterns

6.11 St Helens Borough attracts 49% of all journeys to purchase bulky comparison items which originate from within the Study Area, which represents an improvement on the 36% market share recorded at the time of the last Study in 2005 and on the 29% market share recorded in 2000. Such an improvement is attributable to significant improvements in the bulky goods ‘offer’ provided at Ravenhead Retail Park. St Helens Borough attracts more than half of all bulky goods shopping journeys originating in three separate zones, these being Zones 1, 2 and 5. The fact that the market share achieved for bulky goods shopping is almost uniformly higher than that achieved for non-bulky shopping across all of the zones, indicates that St Helens is well provided for in terms of such retailers, with generally little requirement for shoppers to travel further afield to source bulky items.



6.12 Across the whole of the Study Area, Warrington is once again the second best performing town centre, attracting 20% of bulky shopping journeys originating from within the Study Area, with Liverpool attracting 4% of such journeys.

Table 6.6: Bulky Comparison Goods Market Share Analysis – 2000, 2005 and 2011

Year	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Total
2000	75%	26%	53%	2%	1%	34%	51%	29%
2005	87%	37%	45%	11%	14%	36%	47%	36%
2011	86%	51%	45%	4%	46%	72%	-	49%

Leisure Patterns

6.13 In addition to assessing shopping patterns, the results of the household survey can also be used to assess the use of leisure facilities within the seven categories of 'indoor sports and fitness', 'cinema', 'bars, pubs and nightclubs', 'restaurants', 'ten-pin bowling', 'bingo' and 'theatres, galleries and museums'. No comparable analysis was provided by previous studies and the market shares set out below at Table 6.7 relate to the 2011 survey only.

6.14 As would be expected, St Helens caters for the principal needs of residents in respect of most leisure activities, with the Borough's facilities securing around four out of five trips originating from the central Zone 1 to indoor sports facilities, to the cinema and to bingo. The market share of trips to these three types of facility which originate from the other zone almost wholly located within the Borough – Zone 3 – is generally less than that secured from Zone 1. This is to be expected given Zone 3's accessibility to centres such as Manchester and Warrington. In particular, a limited proportion of cinema visits originating from within Zone 3 are undertaken within the Borough, which reflects the strong attraction to residents of this zone of the Odeon cinema in Warrington.

6.15 St Helens Borough secures a lesser market share of trips to bars, pubs and nightclubs, and to restaurants. Whilst such facilities secure 70% of journeys which originate from the central Zone 1, the more varied experience offered by Manchester, Liverpool and, to some degree, Warrington means that such centres have a strong influence on the direction of trips, particularly at the periphery of the Study Area. The general popularity of higher order centres for evening entertainment has gained momentum in recent years and the market share recorded by St Helens' facilities is not considered to be symptomatic of any particular weakness in the offer, rather it is an inevitable consequence of the Study Area's proximity to Liverpool and Manchester.



- 6.16 An even more modest proportion of trips to theatres, galleries and museums is directed to facilities located within the Borough, which is again a consequence of a greater number of such attractions being available in the regional centres of Liverpool and Manchester. Again, this is not considered to be problematic, particularly as the survey demonstrates that the type of facility which would be expected 'on the doorstep' – the cinema, gym and so on – is available within the St Helens area.
- 6.17 The single obvious deficiency in provision relates to ten-pin bowling alleys, with all trips originating from the Study Area being directed outside St Helens Borough – in particular, to the LA Bowl at Winwick Quay, which attracts 74% of such trips. This is clearly a result of the lack of any such provision in St Helens.

Table 6.7: Indoor Sports/Health and Fitness Market Share Analysis – 2011

Type of Provision	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Total
Indoor Sports and Fitness	88%	48%	76%	1%	43%	77%	47%
Cinema	93%	51%	36%	1%	67%	78%	53%
Bars, Pubs and Nightclubs	70%	47%	60%	2%	29%	54%	40%
Restaurants	70%	45%	51%	5%	33%	46%	39%
Ten-Pin Bowling	0%	0%	0%	0%	0%	0%	0%
Bingo	83%	38%	63%	10%	20%	80%	46%
Theatres, Galleries and Museums	23%	14%	8%	1%	5%	11%	10%

- 6.18 The questions and full tabulation for the 2011 Household Survey are provided at Appendix 2. A summary of the key trends and patterns of consumer behaviour is provided below.

Key Shopper Trends

Main Food Shopping

- The household survey indicates that three stores located in Zone 1 each individually attract 10% or more of the main food shopping market share, these being: the Asda at Kirkland Street, St Helens (10.9%); the Morrisons at Boundary Road, St Helens (10.9%); and, the Morrisons at Baxters Lane, St Helens (10.0%). Two additional stores attract a market share of more than 7%, these being the Asda at Westbrook Shopping Centre in Warrington (7.6%) and the Tesco Extra at Cables Retail Park in Prescot (7.4%). Cumulatively, these five stores are the destination for 46.8% of all main food shopping trips undertaken within the Study Area.
- More than four out of every ten participants in the survey (42.8%) indicated that the principal reason for choosing their main food shopping destination was its proximity to their home, followed



by the fact that the particular store offers low prices (11.4%) and then due to habit or loyalty to the retailer (9.8%).

- A majority of shoppers (69.2%) do their main food shop at least once a week, with 12.9% undertaking it at least twice weekly and 9.1% undertaking it at least once a fortnight.
- A large majority of respondents use the car in travelling to do their main food shop (87.1%), with the next most popular means of travel being by bus (6.2%) and then on foot (5.0%).
- More than two thirds of respondents (69.1%) do not link their main food shopping trip with any other activity, with the most popular activity of those that do being non-food shopping (13.9%).

Top-Up Food Shopping

- Given the geographical spread of the catchment and the nature of top-up food shopping, a large number of stores have been identified as attracting such expenditure. Four individual stores attracted 4% or more of the total top-up food shopping market share, these being: the Asda at Kirkland Street, St Helens (4.4%); the Morrisons at Baxters Lane, St Helens (4.4%); the Tesco at Church Lane, Haydock (4.3%); and, the Tesco at Earle Street, Earlestown (4.2%).
- As would be expected, the household survey indicates that top up shopping trips tend to be undertaken on a more frequent basis than main food shopping trips, with 10.2% of respondents undertaking such shopping trips on a daily basis, 44.7% at least twice weekly and 34.2% at least weekly.

Non-Food Shopping

- St Helens Town Centre is the most popular retail destination for clothing and footwear (with 27.9% of respondents indicating that this was the destination for their last trip to shop for such goods); for books, CDs and DVDs (34.7%); for small household items (27.0%); for chemist goods (36.1%); for electrical items (24.7%); and for furniture, carpets and floor coverings (24.8%).
- The goods types for which St Helens Town Centre is not respondents' most popular retail destination are toys, games, bicycles and recreation goods (with Warrington securing a market share of 25.8% of all such purchases), DIY goods (with Ravenhead Retail Park securing a market share of 24.8%), and garden centre goods (with Rivendell Garden Centre in Widnes securing a market share of 31.5%). Warrington Town Centre secured the second highest market share for a number of goods categories, including clothing and footwear (20.7%); Books, CDs and DVDs (26.7%); household goods (23.3%); chemist goods (20.1%); electrical items (15.5%); DIY goods (24.1%); and, furniture, carpets and floor coverings (21.3%).

Internet Shopping

- Of those surveyed, more than half (56.5%) make use of internet or TV shopping.



- The most popular types of items to be purchased via electronic home shopping are CDs and DVDs (with 50.4% of respondents purchasing the item in this manner), books (38.7%), clothing (37.1%), and then major electrical items (21.7%).

Leisure

- In terms of indoor sports or fitness activities, the two most frequently visited facilities identified by name are the DW Sports Fitness at Ravenshead Retail Park (comprising 8.7% of respondents' visits) and Queens Park Leisure Centre (6.6%).
- Unsurprisingly, Cineworld at Chalon Way West is by far the most popular facility for the Study Area population, with 52.7% of respondents stating that this was the location for most of their cinema visits. The second most popular cinema is the Odeon at Cromwell Avenue in Warrington, with 29.1% of respondents suggesting that this is their preferred destination to watch a film.
- LA Bowl at Winwick Quay is the most popular venue for ten pin bowling, with 74.0% of respondents who partake in this activity usually using this facility. The next most popular facility is AMF Bowling in Wigan which attracts 13.6% of such visits.
- Three bingo halls each attract more than 10% of respondents' journeys to such facilities, these being Mecca Bingo at Kirkland Street, St Helens (attracting 23.1% of all such visits), Gala Bingo at Prince Henry Square, Warrington (18.6%) and the Hippodrome Social Club at Corporation Street, St Helens (11.1%).
- Liverpool City Centre is by far the most frequently visited cultural destination, with 51.3% stating that it is the centre they visit most often for such purposes.
- St Helens Town Centre was identified as the most popular destination for visits to bars, pubs and nightclubs, and for visits to restaurants, with 30.2% and 27.4% of respondents respectively indicating that the centre was their usual destination for such activities. The next most popular destination was Warrington, which was the preferred location for 19.0% of respondents visiting bars, pubs and nightclubs, and for 19.9% of respondents visiting restaurants.

St Helens Town Centre

- Respondents were asked a series of questions in order to understand their views in respect of the attractiveness of St Helens Town Centre's overall offer. Around two thirds of respondents (67.9%) confirmed that they do, on occasion, visit the centre.
- Of these respondents, 67.8% usually travel to the centre by car (either as the driver or as a passenger), with a further 26.0% travelling by bus and 4.6% travelling on foot. Just 0.3% of respondents usually travelled to the centre by bicycle.
- In terms of respondents' main reason for visiting St Helens Town Centre, 32.2% suggested that it was because of the choice and range of shops, 23.3% suggested it was because of the centre's



geographic convenience, and 12.7% identified that their visits principally were due to the services provided by the centre.

- In terms of frequency of visit, 21.0% of respondents visited more than once a week, 22.2% around once a week, 4.1% less than once a week but more than once a fortnight, 15.3% around once a fortnight, and 37.5% less often than once a fortnight.
- 60.7% of respondents failed to identify any single measure which could be introduced in order to increase the frequency they visited St Helens Town Centre. The most frequently suggested improvements relate to the need to increase the choice and range of shops, the need for cheaper parking, and the need for more car parking.
- Of those respondents who indicated that they did not visit St Helens Town Centre, 26.7% suggested that it is too far away from home or work to merit visiting, 22.6% suggested that it is because of difficulty parking, and 13.7% suggested it was because of weaknesses in the choice and range of shops.

Earlestown Town Centre

- With regard to Earlestown Town Centre, more than three quarters of respondents (75.7%) suggested that they never visit the centre.
- Of the respondents that do visit the centre, 72.6% usually travel by car (either as the driver or as a passenger), with 13.9% travelling by bus and 10.3% travelling on foot.
- With regard to respondents' main reason for visiting Earlestown Town Centre, 37.3% indicated that it was to visit the market, 21.0% suggested that it was because of the choice and range of shops, and 13.1% suggested it was principally because of the centre's geographic convenience.
- In terms of frequency of visit, 18.2% of respondents visited more than once a week, 18.0% visited around once a week, 1.3% less than once a week but more than once a fortnight, 6.8% around once a fortnight, and 55.6% less often than once a fortnight.
- 73.3% of respondents failed to identify any single measure which could be introduced in order to increase the frequency they visited Earlestown Town Centre. The single suggested improvement which was cited with any significant regularity relates to the need to increase choice and range of shops.
- Of those respondents who indicated that they did not visit Earlestown Town Centre, 36.9% suggested that it was because they had not visited before or were unfamiliar with the centre, 31.4% suggested that it is too far away from home or work to merit visiting, and 15.4% of respondents suggested it was because of weaknesses in the choice and range of shops.



7.0 Population and Expenditure

Introduction

7.01 This section of the report assesses the current population and expenditure generated (both convenience and comparison goods) within the defined catchment area.

Study Area Population

7.02 The population within each postal code sector has been calculated using Experian Micromarketer G3 data (2011 estimate). The baseline population has then been projected forward based on population projections identified by Experian, derived from mid-year ONS based population estimates for each survey zone, which have then be revised by Experian to take into account anticipated future housing growth.

7.03 Population figures are provided for each of the six survey zones. For the purpose of this Study, population and expenditure has been calculated at five-year intervals to 2026 in accordance with PPS4 (i.e. 2011, 2016, 2021 and 2026).

7.04 On this basis, the identified Study Area is estimated to contain a resident population of approximately 343,700 people in 2011, rising to 349,004 people by 2016, to 355,031 people by 2021, and to 360,098 people by 2026. This represents an increase in population within the Study Area of 16,398 people (or 4.7%) between 2011 and 2026.

7.05 Table 7.1 provides a detailed breakdown of the forecast population change within each survey zone in the period through to 2026.

Table 7.1: Population by Survey Zone (2011 to 2026)

Zone	2011	2016	2021	2026
1.	76,364	77,935	79,507	80,831
2.	88,605	89,689	90,737	91,416
3.	21,029	21,474	21,945	22,313
4.	73,968	76,827	79,840	82,696
5.	49,052	48,970	49,066	49,105
6.	34,682	34,109	33,936	33,737
Total	343,700	349,004	355,031	360,098

Source: Experian Micromarketer G3 data



Retail Expenditure

- 7.06 In order to calculate convenience and comparison expenditure per person, WYG has again utilised Experian Micromarketer G3 data, which provides detailed information on local consumer expenditure that takes into account 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 retail studies of this type.
- 7.07 The base year for the Experian expenditure data is 2010. Per capita growth forecasts have been derived from Experian Retail Planner Briefing Note 9, which was published in September 2011. For the purposes of this Study, the following annual growth forecasts have been applied.

Table 7.2: Expenditure Growth Forecasts

Year	Convenience	Comparison
2011	-0.3%	+0.5%
2012	-0.4%	+1.6%
2013	+0.5%	+2.1%
2014 to 18	+0.5% per annum	+3.0% per annum
2019 to 26	+0.6% per annum	+2.9% per annum

Source: Retail Planner Briefing Note 9 (September 2011)

- 7.08 The latest growth forecasts suggest that the current downturn in the economy will continue to impact upon future expenditure, at least in the short term. However, over the medium to long term it is expected that the forecast levels of growth will increase as the economy recovers to levels broadly commensurate with those identified prior to the recession. In terms of convenience goods, Experian forecasts negative annual growth of -0.3% and -0.4% per annum in 2011 and 2012 respectively, before identifying increased anticipated growth of 0.5% per annum between 2013 and 2018, and of 0.6% per annum between 2019 and 2026. For comparison goods, modest growth of 0.5% per annum and 1.6% per annum is forecast in 2011 and 2012, before anticipated growth of 2.1% per annum in 2013, of 3.0% per annum between 2016 and 2018, and then of 2.9% per annum between 2019 and 2026.
- 7.09 In viewing the above, WYG considers that the growth in expenditure forecast over 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.



7.10 Experian Retail Planner Briefing Note 9 also provides a forecast as to 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 Study period. In this regard, it should be noted that many products which are ordered online are actually sourced from a physical store's shelves or stockroom (particularly in the case of convenience goods). Accordingly, expenditure committed in this manner acts to support stores and should be considered 'available' to tangible retail destinations. Appendix 3 of Retail Planner Briefing Note 9 states that:

'Since the non-store retailing figures include supermarkets and other retailers that source internet goods sales from store space, the share of non-store retailing is over-stated from the point of view of those interested in physical retail outlets, particularly for convenience goods.'

7.11 Due to this 'over-statement', in making an allowance for expenditure committed via special forms for trading, we adopt Experian's adjusted figure (again provided at Appendix 3 of Retail Planner Briefing Note 9) which accounts for internet sales which are sourced from stores. The proportion of expenditure committed through special forms of trading cited below at Table 7.3 is 'stripped out' of the expenditure identified as potentially being available to the Study Area.

Table 7.3: Special Forms of Trading Forecasts

Year	Convenience	Comparison
2011	4.2%	10.0%
2016	5.9%	12.7%
2021	6.3%	12.4%
2026	6.8%	12.1%

Source: Retail Planner Briefing Note 9 (September 2011)

7.12 Using 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 2011, 2016, 2021 and 2026. In doing so, our assessment takes into account both per capita retail expenditure growth and population change.

Convenience Goods Expenditure

7.13 It is estimated that, in 2011, the resident population of the catchment generates some £641.01m of convenience goods expenditure (after deducting purchases made through special forms of trading). This is forecast to increase to £703.02 by 2026, which represents an increase of £62.00m (or 9.7%) between 2011 and 2026.



Table 7.4: Total Available Expenditure – Convenience (£m)

2011	2016	2021	2026	Growth 2011-2016	Growth 2011-2021	Growth 2011-2026
641.01	649.48	676.41	703.02	8.47	35.40	62.00

Main Food and 'Top-Up' Shopping

7.14 For the purposes of this Study, the proportion of convenience goods expenditure directed to respondents' main food shopping destination has been derived directly from a specific question in the Household Survey and has been applied on a zone by zone basis. The survey indicates that across the Study Area approximately 72.5% of expenditure is directed to the main food shopping destination (bulk food shop) and approximately 27.5% is directed to 'top up' shopping destinations (i.e. regular purchases, such as milk, bread, and so on).

7.15 By applying these expenditure estimates to the identified resident population of the Study Area, convenience goods expenditure on main food shopping is estimated to be £464.78m and 'top up' expenditure is estimated to be £176.23m at 2011.

Comparison Goods Expenditure

7.16 In 2011, the resident population within the Study Area is identified as generating £856.40m of comparison goods expenditure. Given the forecast growth in population and expenditure, this is expected to increase to £1,334.41m by 2026. This represents an increase of £478.01m (or 55.8%) between 2011 and 2026. This is clearly a very significant increase and is a result of the forecast increase in catchment population and, in particular, the forecast level of comparison goods expenditure growth over forthcoming years.

Table 7.5: Total Available Expenditure – Comparison (£m)

2011	2016	2021	2026	Growth 2011-2016	Growth 2011-2021	Growth 2011-2026
856.40	955.98	1,131.12	1,334.41	99.57	274.71	478.01

7.17 For the purposes of this Study, comparison goods expenditure has been divided into eight sub-categories: 'Furniture', 'DIY and Gardening Goods' and 'Electrical' (collectively referred to as bulky goods), and 'Clothing & Footwear', 'Books, CDs, DVDs, etc', 'Household Goods', 'Toys, Bicycles and Other Recreational Goods' and 'Chemist Goods' (collectively referred to as non-bulky goods). The proportion of expenditure directed to each sub-category is estimated by Experian on a zone by zone



basis. Across the Study Area, residents' expenditure is directed to each sub-category in the following manner.

Bulky Goods

- 'Furniture' – 8.8%
- 'DIY and Gardening Goods' – 7.4%
- 'Electrical' – 11.9%
- Sub-Total – 28.2%**

Non-Bulky Goods

- 'Clothing & Footwear' – 30.5%
- 'Books, CDs, DVDs, etc.' – 6.6%
- 'Household Goods' – 6.0%
- 'Toys, Bicycles and Other Recreation Goods' – 14.0%
- 'Chemist Goods' – 14.7%
- Sub-Total – 71.8%**

Market Share

- 7.18 Having calculated the likely levels of expenditure which are generated by the resident population with the defined Study Area, it is necessary to identify what proportion of this expenditure is currently attracted to retail facilities located within St Helens Borough (which comprises almost all of Zones 1 and 3, and parts of Zones 2, 5 and 6).
- 7.19 As previously highlighted, this Study has involved the completion of 1,000 household telephone surveys within the defined Study Area. By analysing the results from the survey, it is possible to estimate the levels of expenditure which are directed towards St Helens' shopping facilities. It should be noted that this analysis differs from the commentary provided at Section 6 (at least in respect of the total Study Area market share), as it relates specifically to the distribution of expenditure rather than the direction of shopping journeys.
- 7.20 The market shares for the various expenditure categories are provided in Tables 7.6 and 7.7.



Table 7.6: St Helens Borough Current Market Share – Convenience (2011)

Zone	Market Share (%)		
	Main Convenience	'Top-Up' Convenience	Total [^]
Zone 1	89.4	97.8	91.9
Zone 2	52.3	57.7	53.7
Zone 3	69.4	91.5	77.5
Zone 4	5.1	5.0	5.1
Zone 5	30.7	27.3	29.8
Zone 6	69.4	79.7	72.0
Total	49.0	57.4	51.3

Source: Derived from Expenditure Tables Provided at Appendix 6

[^] Based on cumulative market share of main and 'top-up' food shopping

Based on market share of expenditure

Table 7.7: St Helens Borough Current Market Share – Comparison (2011)

Zone	Market Share (%)								
	Clothing & Footwear	Books, CDs, etc.	Household Goods	Toys, etc.	Chemist	Electrical	Furniture	DIY	Total
Zone 1	63.2	78.5	68.1	71.7	94.3	83.9	77.7	96.0	76.4
Zone 2	31.4	36.0	43.8	36.3	53.7	53.4	43.9	55.7	42.0
Zone 3	41.3	38.7	53.3	32.4	76.2	52.0	62.2	20.4	47.3
Zone 4	3.4	3.4	6.5	4.0	3.4	7.0	5.3	5.0	4.1
Zone 5	27.1	30.6	26.9	34.7	26.5	46.2	39.3	51.6	33.4
Zone 6	47.4	50.9	51.5	54.3	71.7	68.1	63.3	83.8	59.3
Total	32.8	37.9	39.1	38.0	49.6	49.4	44.5	52.5	41.2

Source: Derived from Expenditure Tables Provided at Appendix 6

Based on market share of expenditure

Convenience Goods Market Share

7.21 Table 7.6 indicates that shopping destinations within St Helens Borough account for an estimated 49.0% of main food shopping expenditure generated by residents of the Study Area. However, this figure is significantly reduced by the very limited expenditure which is attracted to St Helens' facilities from Zone 4, which is almost wholly located within the Warrington administrative area. Within the centrally located Zone 1, 89.4% of expenditure is retained within St Helens which is considered to be an appropriately strong performance, given the relatively comprehensive convenience goods retail offer in the Borough.

7.22 In terms of 'top-up' convenience shopping, existing facilities within St Helens Borough attract around 57.4% of such expenditure generated within the Study Area. The proportion of 'top up' expenditure attracted to facilities in St Helens Borough is higher than that recorded for main-food expenditure in



those zones which are substantially located within the Borough itself (i.e. Zones 1, 2, 3 and 6). This is because top-up spending is undertaken on an ad-hoc basis using local facilities. This is to be expected and should be encouraged as it stops unnecessarily long journeys to purchase a handful of items.

- 7.23 Overall, existing facilities within St Helens Borough attract £227.86 m of main food shopping expenditure and £101.15m of 'top-up' convenience expenditure generated in the Study Area in 2011. Accordingly, facilities within St Helens attract a total of £329.00m of convenience goods expenditure generated from within the Study Area (a 51.3% market share).

Comparison Goods Market Share

- 7.24 Within the bulky goods sector, facilities within St Helens Borough are identified as attracting 44.5% of 'furniture' expenditure, increasing to 49.4% of 'electrical goods expenditure' and 52.5% of 'DIY goods' expenditure. In combining the market shares of the above goods types, the bulky goods sector as a whole within St Helens Borough attracts 48.7% (or £117.39m) of such expenditure which originates from within the Study Area. Whilst this market share is relatively moderate, it is largely a consequence of the Study Area being extensive and including areas in Zones 2, 4, 5 and 6 which offer excellent access to Wigan, Warrington, Liverpool and other prominent retail destinations.
- 7.25 In this regard, it is relevant to note that the market share secured by St Helens Borough retail facilities of all bulky goods expenditure originating from within the central Zone 1 is 85.1%, which is considered a reasonably strong performance and not indicative of any particular weakness in provision.
- 7.26 Within the non-bulky goods sector, facilities within the Study Area are identified as attracting 32.8% of 'clothing and footwear' expenditure originating from within the Study Area, increasing to 37.9% of 'books, CDs, DVDs', 38.0% of 'toys and recreation goods', 39.1% of 'household goods' and 49.6% of 'chemist and beauty goods' expenditure. In combining the market shares of the above goods types, the non-bulky sector as a whole within St Helens Borough attracts 38.2% (or £235.23m) of such expenditure originating from the Study Area. This is notably lower than the market share achieved for bulky goods and is reflective of the very strong comparison goods offer provided in nearby retail destinations, such as Warrington (which has been bolstered by the recent successful Golden Square development), Liverpool, Wigan, Manchester and the Trafford Centre. Such destinations generally offer a greater range of non-bulky comparison goods retailers than can currently be found in St Helens Borough, thus resulting in the relatively modest market share of clothing and footwear expenditure.



7.27 Notwithstanding this, it should be noted that St Helens facilities claimed a relatively encouraging 72.9% of all non-bulky goods expenditure originating from within Zone 1, although the retained market share of Zone 1 'clothing and footwear' expenditure was again lower than this at 63.2%.

Forecast Growth in Expenditure Attracted to Study Area

7.28 With forecast growth in convenience goods expenditure predicted to increase at an average of 0.6% per annum across the whole of the Study period from 2011 to 2026, and with the Study Area population expected to grow from around 343,700 to 360,098 people over the same period, it is estimated that the Study Area will experience an increase in convenience goods expenditure of approximately £62.00m by 2026. Assuming a constant St Helens market share of 51.3%, this equates to £31.82m increase in convenience goods expenditure claimed by St Helens facilities.

7.29 The significant predicted increase in expenditure on comparison goods (an average 3.0% per annum increase over the period 2011 to 2026) results in a further £478.01m of comparison goods expenditure being generated within the Study Area by 2026. Assuming a constant market share of 41.2%, existing facilities within St Helens Borough will capture around a further £196.82m of comparison goods expenditure by 2026.

7.30 This analysis is based upon the 'rolling forward' of current market shares achieved by facilities within St Helens for each category of goods. The approach of rolling forward existing market shares is in line with standard practice and does not take into account the desirability or need to 'claw back' expenditure leakage directed to centres elsewhere through improvements in retail provision.

7.31 In any event, in order for the Study Area to capture the significant growth in retail expenditure which is forecast (particularly for comparison goods), it is likely that there will be a need to enhance future retail provision, thereby ensuring that this growth is not lost to competing centres and that the future St Helens market share does not decline.

7.32 It should also be noted that, if an excess of comparison or convenience goods expenditure manifests itself within the Study Area, this does not translate directly into a requirement for additional floorspace. It is also necessary to take account of:



- Existing development proposals;
- Expected changes in shopping patterns;
- The current capacity and efficiency of retail floorspace within the established centres;
- Future changes in business productivity and current development commitments; and
- Potential changes in forecast expenditure growth in the future.



8.0 Retail Capacity

8.01 The quantitative modelling for the capacity assessment has been undertaken for both convenience and comparison goods shopping. This approach is advocated by PPS4, which states at Policy EC1.4 that:

'...when assessing quantitative need, have regard to relevant market information and economic data, including a realistic assessment of:

- i. existing and forecast population levels**
- ii. forecast expenditure for specific classes of goods to be sold, within the broad categories of comparison and convenience goods and for main leisure sectors and**
- iii. forecast improvements in retail sales density.'**

8.02 For the purposes of this capacity exercise, WYG has examined the need for both convenience and comparison goods floorspace. Indicative capacity assessments are provided at 2016, 2021 and 2026, but any assessment over the longer term should be viewed with some caution. Any identified need or capacity identified beyond 2016 is not justification for new retail floorspace outside of centres, as this could prejudice the implementation of emerging town centre redevelopment strategies and the development of more central sites which, although not available for retail development at present, may become available between now and 2016 or after 2016. Tables providing full details of inputs and the step-by-step application of the methodology set out below are provided at Appendix 6.

Capacity Formula

8.03 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 / Deficit (£m).

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. catalogue shopping/internet).

Turnover (£m) – The turnover figure relates to the annual turnover generated by existing retail facilities with 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 density for all major multiple retailers.

Surplus / Deficit (£m) – This represents the difference between the expenditure and turnover figures outlined above. Clearly, a surplus figure will represent an under provision of retail facilities within the Study Area (which, all things being equal, would suggest that additional floorspace is required), whereas a deficit would suggest an over provision of retail facilities (and in these circumstances it would prove difficult to justify additional floorspace).

- 8.04 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, electrical retailers, such as Currys (which is considered a bulky goods retailer), have a much higher sales density than other bulky goods retailers, such as Carpetright, and clothing and footwear (non-bulky goods) operators generally have a higher sales density than bulky goods retailers.

Capacity for Future Convenience Goods

- 8.05 In order to ascertain the likely need for additional convenience goods floorspace within the Borough, it is first necessary to consider the current provision. Given that the Borough is already relatively well provided for with a variety of foodstore operators, it is assumed that the future convenience goods expenditure available to St Helens will be commensurate with its current market share. This current market share is calculated by examining the trading performance of stores in Zones 1 and 3, and the stores located in those parts of Zones 2, 5 and 6 which lie within St Helens Borough.
- 8.06 Table 8.1 sets out the survey-derived turnover of each food retail destination within the Borough. For each destination the survey-derived turnover is compared to a 'benchmark' turnover which indicates the level of turnover which 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.

- 8.07 The 'benchmark' 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. However, for this study, we have been able to draw upon the Council's up-to-date surveys of local centres which have provided an estimation of the trading areas of each recognised centre. It has been assumed that the sales areas of all small-scale local convenience goods floorspace will turnover an average of £3,000 per sq.m, which is considered to represent a realistic and achievable level of turnover for such operators. For each convenience goods store, an assumption has been made as to the proportion of its turnover which is likely to derive from within the Study Area.
- 8.08 Futhermore, as this assessment is based upon a 'goods based' approach which disaggregates expenditure by category type, it is important to recognise that major foodstore operators generally sell an element of non-food goods such as books, compact discs, clothing and household goods. To account for this, the typical ratio between convenience/comparison goods provision for each operator²² has been applied to the estimated net floorspace of each foodstore. This provides an indication of the likely sales area dedicated to the sale of convenience goods at each store.
- 8.09 Whilst survey results are commonly accepted as a means by which to identify existing shopping patterns, their findings should be treated with a 'note of caution' as they tend to have a bias towards larger stores and understate the role of smaller stores and independent retailers.
- 8.10 Table 8.1 indicates that, across the Borough, the expected turnover of existing convenience goods shopping provision is £248.72m, which compares to a survey-derived turnover of £329.00m. This suggests that, cumulatively, convenience goods floorspace is effectively 'overtrading' by some £80.28m.

²² Derived from 'UK Grocery Retailers' report, Verdict, September 2011.



Table 8.1: Trading Performance of Current Foodstores in St Helens Borough

Store	Net F'space (sq.m) ¹	Net Conv F'space (sq.m) ²	T'over per sq.m (£) ³	Bench-mark Turnover (£m)	% from Study Area ⁴	Bench-mark from Study Area (£m)	Survey Estimate (£m) ⁵
Zone 1							
Aldi, Peasley Cross	929	641	4,670	2.99	95%	2.84	2.82
Asda, Kirkland Street	3,579	2,112	13,470	28.45	95%	27.02	59.46
Co-op, Higher Parr Street	232	200	8,264	1.65	100%	1.65	0.27
Co-op, Cambridge Road	232	200	8,264	1.65	100%	1.65	0.68
Co-op, Parr Stocks Road, Parr Stocks	405	348	8,264	2.88	100%	2.88	0.71
Co-op, Sutton Park Drive	184	158	8,264	1.31	100%	1.31	0.90
Co-op, Ashton Green Drive	232	200	8,264	1.65	100%	1.65	0.86
Co-op, Millbrook Lane	139	120	8,264	0.99	100%	0.99	1.17
Co-op, Elephant Lane, Thatto Heath	405	348	8,264	2.88	100%	2.88	1.13
Co-op, Peckers Hill Road, Sutton	175	150	8,264	1.24	100%	1.24	0.68
Farmfoods, Boundary Road	1,804	1,623	5,000	8.12	100%	8.12	2.04
Iceland, Ormskirk Street	446	437	6,167	2.70	100%	2.70	3.82
Iceland, St Helens Retail Park	500	490	6,167	3.02	100%	3.02	3.73
Lidl, Lowe Street	929	734	3,485	2.56	100%	2.56	2.36
Marks & Spencer, Church Street	1,115	1,059	10,536	11.16	95%	10.60	7.05
WM Morrisons, Boundary Road	2,884	2,279	12,035	27.42	95%	26.05	54.64
WM Morrisons, Baxters Lane	3,252	2,569	12,035	30.92	95%	29.37	53.36
Spar, St Helens Linkway	35	31	7,319	0.23	100%	0.23	0.23
Spar, Prescott Road	68	61	7,319	0.45	100%	0.45	0.00
Tesco, Chalton Way West	3,343	2,206	11,942	26.35	95%	25.03	21.93
Tesco Metro, Four Acre Lane	1,171	773	11,942	9.23	100%	9.23	11.86
Other, St Helens Town Centre	-	-	-	11.39	100%	11.39	11.39
Other, Rest of Zone 1	2,918	2,262	3,000	7.88	100%	7.88	1.25
Sub-Total Zone 1	-	-	-	187.10	-	180.73	242.34
Zone 2							
Aldi, Branch Way, Haydock	754	520	4,670	2.43	100%	2.43	2.25
Co-op, Blackbrook Road	139	120	8,264	0.99	100%	0.99	0.50
Co-op, Chain Lane	232	200	8,264	1.65	100%	1.65	1.90
Iceland, Branch Way	686	672	6,167	4.15	100%	4.15	1.72
Spar, Haresfinch View	147	132	7,319	0.97	100%	0.97	0.00
Spar, Island Brow	119	107	7,319	0.78	100%	0.78	0.52
Spar, West End Road	98	88	7,319	0.64	100%	0.64	0.00
Tesco, Church Road	2,175	1,436	11,942	17.15	95%	17.15	32.52
Other, Zone 2	2,160	1,944	3,000	5.83	100%	5.83	5.16
Sub-Total Zone 2	-	-	-	34.59	-	33.73	44.58
Zone 3							
Market, Earlestown	-	-	-	0.30	100%	0.30	0.00
WM Morrisons, Haydock Street	998	788	12,035	9.49	100%	9.49	4.70
Tesco, Earle Street	1,614	1,065	11,942	12.72	95%	12.09	19.62
Local Shops, Earlestown Town Centre	-	-	-	0.63	100%	0.63	0.63
Other, Zone 3	152	137	3,000	0.41	100%	0.41	2.63
Sub-Total Zone 3	-	-	-	23.55	-	22.92	27.58
Zone 5							
Co-op, Warrington Road	498	428	8,264	3.54	100%	3.54	6.18
Other, Zone 5	672	605	3,000	1.81	100%	1.81	5.91
Sub-Total Zone 5	-	-	-	5.35	-	5.35	12.09
Zone 6							
Tesco Express, Greenfield Road	141	93	11,942	1.12	100%	1.12	3.26
Tesco Express, East Lancashire Road	198	131	11,942	1.56	100%	1.56	0.25
Co-op, Church Road, Rainford	174	150	8,264	1.24	100%	1.24	2.72
Other, Zone 6	770	693	3,000	2.08	100%	2.08	1.24
Sub-Total Zone 6	-	-	-	5.99	-	5.99	7.46
Total	-	-	-	256.58	-	248.72	329.00

¹ Gross Floorspace derived from Council surveys, Experian Goad (2011) or IGD Database (2010), net floorspace based on WYG judgement

² Net convenience floorspace derived from Verdict UK Grocery Retailers (2011) where available

³ Sales densities derived from Verdict (2011) or Mintel Retail Rankings (2011) for national multiples and WYG assessment for local shops

⁴ The proportion of store turnover derived from within the Study Area is based on WYG's judgement, informed by the location of the store and the scale of its provision. It is assumed that smaller convenience stores will draw all of their turnover from within the Study Area

⁵ Survey derived turnover derived from Household Survey. Some smaller stores' turnover is modest and has not been picked up by the survey At 2010 prices



- 8.11 Accepting the caveat provided at paragraph 8.09, the survey indicates that a number of stores are performing particularly strongly, these being the Asda store at Kirkland Street and the Morrisons stores at Boundary Road and Baxters Lane in St Helens (which overtrade by 120.0%, 109.7% and 81.7% respectively), and the Tesco at Church Road in Haydock (which overtrades by 99.7%). Conversely, the survey indicates that the Tesco store at Chalon Way in St Helens performs relatively poorly, effectively undertrading by 12.4%.
- 8.12 It should be noted that, although the level of overtrading at the above identified stores is high, such trading performances are not uncommon and will occur at numerous stores operated by the 'big four' supermarket retailers.
- 8.13 In order to appraise the need for additional convenience goods retail floorspace, it is necessary to consider how over-trading may be affected by future growth in expenditure. Accordingly, Table 8.2 sets out the anticipated increase in expenditure which will be available to the Borough's convenience goods retail facilities, assuming that the current market share is maintained. It is also assumed that the turnover of existing floorspace will improve at the rate suggested by Experian Retail Planner Briefing Note 9 through improvements in floorspace efficiency²³.
- 8.14 Following this, at Table 8.3, we then consider the effect existing retail commitments will have in meeting identified convenience shopping needs.

Table 8.2: Estimated Capacity for Convenience Goods Facilities in St Helens Borough

Year	Turnover - £m ¹	Available Expenditure - £m ²	Surplus Expenditure - £m ²
2011	248.72	329.00	80.28
2016	248.43	333.35	84.92
2021	251.93	347.17	95.24
2026	254.46	360.83	106.37

¹ Allows for increased turnover efficiency in line with estimated projections provided by Retail Planner Briefing Note 9

² Assumes constant market share claimed by facilities within St Helens Borough
At 2010 prices

- 8.15 Table 8.2 indicates that, through increases in both population and expenditure, the £80.28m convenience goods expenditure surplus identified at 2011 rises to £84.92m at 2016, to £95.24m at 2021, and to £106.37m at 2026. Existing convenience retail floorspace commitments are limited in number, with the most significant being the Tesco Extra foodstore linked to the St Helens Rugby

²³ By -1.7% per annum in 2012, +0.4% per annum between 2013 and 2018, and 0.2% per annum between 2019 and 2026.



League Football Stadium at the former United Glass factory site²⁴. The additional convenience goods element of this floorspace (over and above the level of provision previously provided by Tesco's store at Chalon Way) would be expected to turn over in the order of £24.48m at 2011, with the total expenditure claimed by all three commitments estimated to be £28.29m at base year.

8.16 However, even accounting for existing commitments, it is evident that there is still significant residual expenditure available to support additional food retail provision. Indeed, the residual of £51.99m identified at 2011 would be sufficient to support the convenience goods element associated with two additional food superstores, and by 2026 the residual would be sufficient to support around three food superstores (or a greater number of smaller stores).

Table 8.3: Quantitative Need for Additional Convenience Goods Floorspace in St Helens Borough

Year	Convenience Goods				
	£m			Floorspace Requirement (Net)	
	Surplus	Commitments	Residual	Min ^{1*}	Max ^{2*}
2011	80.28	28.29	51.99	4,247	10,397
2016	84.92	28.26	56.66	4,634	11,345
2021	95.24	28.66	66.59	5,370	13,148
2026	106.37	28.94	77.42	6,182	15,136

¹ Average sales density assumed to be £12,242 per sq.m (based on the average sales density of the leading four supermarkets as identified by Verdict 2011)

² Average sales density assumed to be £5,000 per sq.m
At 2010 prices

Capacity for Future Comparison Goods

8.17 As highlighted in Section 5 of this report, both St Helens and Earlestown contain a varied range of comparison goods floorspace, including retail warehousing, high street multiples, independent retailers, markets and so on. Given the diverse range of retailers trading in the Study Area, it is considerably more difficult to accurately assess a likely 'benchmark' turnover for each facility. Therefore, the most accurate way to estimate the turnover of existing retail facilities is to analyse the market share of each retail destination identified by the Household Survey.

8.18 Our analysis of the market share of facilities in St Helens indicates that the current level of trade passing through non-food facilities originating from inside the Study Area is £352.62m. This represents 41.2% of the total comparison goods expenditure generated from within the defined Study

²⁴ The Tesco Extra opened on 31 October 2011 and is therefore considered as a 'commitment' as it was not trading at the time the household survey which informs this study was undertaken.



Area. Due to difficulties in ascertaining accurate floorspace figures and reasonable benchmark turnovers for town centre stores which include a high proportion of independent traders, comparison goods facilities are considered to be trading 'in equilibrium' at the base year of 2011. From our knowledge of St Helens and Earlestown, we consider the turnover identified by the household survey to be broadly in line with expectations and the assumption of the current trading performance being 'in equilibrium' is considered to be robust.

Table 8.4: Estimated Capacity for Comparison Goods Facilities in St Helens Borough

Year	Turnover - £m ¹	Available Expenditure - £m ²	Surplus Expenditure
2011	352.62	352.62	0.00
2016	383.26	393.62	10.37
2021	416.96	465.74	48.78
2026	453.63	549.44	95.82

¹ Allows for increased turnover efficiency in line with estimated projections provided by Retail Planner Briefing Note 9

² Assumes constant market share within the Study Area
At 2010 prices

- 8.19 On this basis, WYG has 'rolled forward' St Helens' current market share to examine the likely comparison goods floorspace required to allow the centres' current position within the retail hierarchy to be maintained.
- 8.20 Accordingly, given the forecast increases in comparison goods expenditure and Study Area population, WYG estimates that between 2011 and 2016, an additional £41.00m originating from the Study Area will be spent on all comparison goods (bulky and non-bulky) within the Borough. After accounting for the claim made on this expenditure by existing floorspace, we estimate that £10.37m will be available to support additional comparison goods provision at 2016.
- 8.21 This identified surplus is relatively modest in the short term due to the current repressed market conditions, which result in the limited forecast increases in comparison goods expenditure over the short term set out by Experian Retail Planner Briefing Note 9. However, the identified expenditure surplus is forecast to sharply increase to £48.78m by 2021 and £95.82m by 2026.
- 8.22 In order to account for the differing trading performance of potential end operators, we have applied sales densities of £3,000 per sq.m and £5,000 per sq.m to the identified surplus expenditure (except the committed Tesco Extra comparison goods floorspace at the former United Glass factory site, to which we have applied the Tesco company average sales density sourced from Verdict's UK Food & Grocery Retailers 2011 report). St Helens is already the subject of very significant committed



comparison goods floorspace in the form of the Tesco Extra planning permission, and the proposed Mainsway and Chalon Way developments. Cumulatively, permitted developments provide a total of 31,204 sq.m of comparison goods sales floorspace and will turn over an estimated £163.77m at 2011. Such significant developments therefore negate any need for further comparison goods development over the entire reporting period to 2026 (and beyond)²⁵.

Table 8.5: Quantitative Need for Additional Comparison Goods Floorspace in St Helens Borough

Year	Comparison Goods				
	£m			Floorspace Requirement (Net)	
	Surplus	Commitments	Residual	Min ^{1*}	Max ^{2*}
2011	0.00	163.77	-163.77	0.0	0.0
2016	10.37	177.99	-167.62	0.0	0.0
2021	48.78	193.64	-144.87	0.0	0.0
2026	95.82	210.67	-114.86	0.0	0.0

¹ Average sales density assumed to be £5,000 per sq.m at 2011

² Average sales density assumed to be £3,000 per sq.m at 2011
At 2010 prices

8.23 As indicated at paragraph 8.19, the above assessment is based upon the existing market share achieved by St Helens’ facilities being rolled forward for future design years. However, given the type and scale of the floorspace already committed in and around St Helens Town Centre, it is likely that the centre will retain increasing amounts of comparison goods expenditure as a result of improvements in the retail provision. Even if it is assumed that only a relatively modest increase in market share is achieved – of five percentage points to 46.2% – then a significantly greater expenditure surplus (£162.54m rather than £95.82m) is available at 2026 to support additional floorspace.

8.24 Tables 8.6 and 8.7 set out the quantitative need for additional floorspace assuming an increase in St Helens’ market share of comparison goods expenditure to 46.2%. Table 8.7 indicates that, should the very significant extant commitments be implemented, then there will still be no quantitative need for additional convenience goods facilities in the period to 2021.

²⁵ In order to present our findings in a straightforward manner, we have articulated the floorspace requirement at each of the reporting years as being zero. However, Tables 25b and 25d of Appendix 6 convert the identified negative expenditure residual into a negative floorspace requirement to provide an indication as to how much greater the committed supply of floorspace is compared to the identified quantitative ‘need’.



Table 8.6: Estimated Capacity for Comparison Goods Facilities in St Helens Borough (Increased Market Share)

Year	Turnover - £m ¹	Available Expenditure - £m ²	Surplus Expenditure
2010	352.62	395.44	42.82
2015	383.26	441.42	58.17
2021	416.96	522.29	105.33
2026	453.63	616.16	162.54

¹ Allows for increased turnover efficiency in line with estimated projections provided by Retail Planner Briefing Note 9

² Assumes constant market share within the Study Area
At 2010 prices

Table 8.7: Quantitative Need for Additional Comparison Goods Floorspace in St Helens Borough (Increased Market Share)

Year	Comparison Goods				
	£m			Floorspace Requirement (Net)	
	Surplus	Commitments	Residual	Min ^{1*}	Max ^{2*}
2011	42.82	163.77	-120.95	0.0	0.0
2016	58.17	176.42	-118.26	0.0	0.0
2021	105.33	190.06	-84.72	0.0	0.0
2026	162.54	204.75	-42.21	0.0	0.0

¹ Average sales density assumed to be £5,000 per sq.m at 2011

² Average sales density assumed to be £3,000 per sq.m at 2011
At 2010 prices



9.0 Future Retail Policy

9.01 Policy EC3 of PPS4 requires local planning authorities, as part of their economic vision for their area, to set out a strategy for the management and growth of centres over the plan period. As part of their strategy, local planning authorities should, *inter alia*:

- Define a network (the pattern of provision of centres) and hierarchy (the role and relationship of centres in the network) of centres that is resilient to anticipated future economic changes, to meet the needs of the catchment.
- Define the extent of town centres and their primary shopping area, distinguishing between realistically defined primary and secondary frontages in designated centres and set policies that make clear which uses will be permitted in such locations.
- At the local level, consider setting floorspace thresholds for the scale of edge-of-centre and out-of-centre development which should be subject to an impact assessment (as required by Policy EC16.1 of PPS4) and specify the geographic areas these thresholds will apply to.

9.02 Each of the above three requirements is considered below in relation to St Helens Borough and its principal town centres below.

Hierarchy

9.03 The current retail strategy for St Helens is set out by the 'saved' policies of the St Helens UDP, which was adopted in July 1998, with relevant policies being 'saved' to remain part of the statutory development plan in September 2007 under the provisions of the Planning and Compulsory Purchase Act 2004.

9.04 Schedule 2 of the Retailing chapter of the St Helens UDP identifies a retail centre hierarchy which comprises of:

- i) St Helens Town Centre.
- ii) Earlestown Town Centre.
- iii) Local Shopping Centres, namely:
 - Main Street, Billinge;
 - Boundary Road, West Park;
 - Chain Lane Shopping Precinct, Haresfinch;
 - Chancery Lane, Haydock;



- Clock Face Road;
- Walmesley Road, Eccleston;
- Higher Parr Street, Fingerpost;
- Four Acre Lane, Marshalls Cross;
- Cambridge Road, Newtown;
- High Street, Newton-le-Willows;
- Church Road/Ormskirk Road, Rainford;
- Warrington Road, Rainhill;
- Peckershill Road/Junction Lane, Sutton Village; and
- Elephant Lane/Thatto Heath Road, Thatto Heath.

9.05 The St Helens Re-Publication Core Strategy was placed on consultation between 27 January and 9 March 2011, and was formally submitted to the Secretary of State on 1 June 2011. The Re-Publication document sets out at Policy CSS 1 the overall spatial strategy for St Helens and the proposed hierarchy of town centres, which can be summarised as follows:

- **Regional Town:** St Helens;
- **Second Town Centre:** Earlestown;
- **District Centres:** Rainhill and Thatto Heath;
- **Local Centres:** Billinge, Chain Lane, Chancery Lane, Clipsley Lane, Denton's Green, Eccleston, Fingerpost, Marshall's Cross, Newton-le-Willows, Newtown, Rainford and Sutton.

9.06 The Re-Publication draft of the Core Strategy indicates that St Helens is the major retail and service centre serving the Borough and that this role will be protected. Policy CAS 2 relates to the St Helens Central Spatial Area and indicates that the Council will seek to encourage the town's role as an accessible and welcoming destination for shopping, leisure, culture, tourism, employment and housing.

9.07 The research undertaken during the course of this study indicates that St Helens remains an extremely important retail centre which caters for the majority of its catchment population's comparison goods needs. Accordingly, it is considered that future retail policy must emphasise St Helens' role as a regional town, which should be a focus for significant additional retail and town centre development.

9.08 WYG considers the hierarchy proposed by the Helens Re-Publication Core Strategy document to be appropriate and considers that the wording of Policy CAS 2 makes appropriate provision to direct significant town centre provision to St Helens Town Centre.



Primary Shopping Area

9.09 As indicated at paragraph 9.01 above, it is necessary for local planning authorities to identify the primary shopping area of existing centres as this forms the basis in terms of the application of the sequential approach to development. In this respect, Annex B of PPS4 provides the following definitions for the primary shopping area, the primary frontage and the secondary frontage.

- Primary Shopping Area
'Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are contiguous and closely related to the primary shopping frontage). The extent of the primary shopping area should be defined on the proposals map. Smaller centres may not have areas of predominantly leisure, business and other main town centre uses adjacent to the primary shopping area, therefore the town centre may not extend beyond the primary shopping area.'

- Primary Frontage
'Primary frontages are likely to include a high proportion of retail uses.'

- Secondary Frontage
'Secondary frontages provide greater opportunities for a diversity of uses.'

9.10 Figure 8.1 of the Re-Publication Core Strategy ('Strategy for St Helens Central Spatial Area') defines the extent of the St Helens Primary Shopping Area, the Primary Retail Frontage and the Town Centre Boundary. WYG has reviewed these boundaries as part of this study and considers them to be appropriate.

9.11 Figure 9.1 of the Re-Publication document defines only a indicative Town Centre boundary for Earlestown. Given the requirements of PPS4, it is considered prudent to also define a Primary Shopping Area to assist in locating future retail development. In this regard, we provide our recommendation as to the appropriate extent of the Earlestown Primary Shopping Area (centred around Market Street) on the plan provided as Appendix 7.

9.12 The core of Earlestown Town Centre is already subject to a variety of uses and we do not consider there to be merit in defining shopping frontages which would ultimately act to restrict development outside Use Class A1. Given the character of Earlestown, any such restriction would likely be counter-productive in terms of safeguarding its future vitality and viability.



Thresholds

- 9.13 In accordance with guidance in PPS4, it is appropriate to identify thresholds for the scale of edge-of-centre and out-of-centre development which should be subject to an impact assessment. WYG does not consider that a blanket threshold is suitable for all types of centre across an administrative area. For example, a 500 sq.m convenience store (which could be operated by Tesco Express or Sainsbury's Local) will likely have a greater impact on a small centre than a similar facility would on St Helens Town Centre. Therefore, in developing the policy in the future, it may be more appropriate to have a range of thresholds, depending upon which centre the development applies to.
- 9.14 Accordingly, policy could advocate a tiered approach whereby the threshold applied to planning applications at edge-of-centre and out-of-centre locations varies in relation to the role and function of the particular centre.
- 9.15 For a centre of the size of St Helens, performing the role that it does, it is recommended that development proposals providing greater than 500 sq.m gross floorspace for town centre uses in an edge or out-of-centre location should be the subject of an impact assessment. It is considered appropriate to reduce the threshold for Earlestown and district centres to 300 sq.m gross and for local centres to 200 sq.m gross. In our experience, it will only generally be development of a scale greater than these thresholds which will lead to a 'significant adverse' impact, which could merit the refusal of an application for town centre uses in accordance with the provisions of Policy EC17.1 of PPS4.

Retail Strategy

- 9.16 In terms of convenience goods provision, this Study has identified an immediate requirement throughout the Borough (over and above existing commitments) for an additional 4,247 sq.m to 10,397 sq.m (dependent on format and operator) of convenience goods sales floorspace at 2011. The level of need identified is principally a consequence of current stores' overtrading – particularly the Asda store at Kirkland Street, and the Morrisons stores at Boundary Road and Baxters Lane in St Helens. Whilst the identified capacity is reduced by existing commitments (including the large Tesco Extra superstore at the former United Glass site in St Helens, which is now open for trading), the current need is still such that it could support two further large food superstores or a greater number of smaller stores.
- 9.17 Whilst the need for additional convenience goods provision is forecast to grow further between 2016 and 2026, the rate of growth is relatively restrained, resulting in a requirement for an additional 1,572 sq.m to 3,849 sq.m of convenience floorspace over this later ten year period.



- 9.18 We do have some concerns in terms of the current performance of St Helens as a comparison retailing destination. Although St Helens continues to maintain a relatively healthy market share of many categories of comparison good (most notably those falling within the definition of bulky goods), its market share of 'clothing and footwear' expenditure is considered to be below what could reasonably be expected, with substantial expenditure flowing to Warrington, Liverpool and the Trafford Centre (even from zones centrally located within the Study Area). It is also evident that 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.
- 9.19 In our view, although there has been substantial public sector investment into St Helens Town Centre (most obviously through significant improvements in the quality of the public realm), this has not been replicated by private investment of a commensurate scale. In particular, we note that the former Woolworths store on Church Street remained vacant for almost three years, despite it providing a large floorplate in a very accessible and visible location. It is now only part-occupied by 99p Stores. Given the prime location of this store, the apparently difficulty in securing its letting is of concern.
- 9.20 This study has identified a significant need for additional comparison goods floorspace which could be met, in the main, by the existing Chalon Way commitment. Due to the importance of this single opportunity, any future strategy for St Helens town centre will need to carefully consider the progress being made with the implementation of the scheme.
- 9.21 Given that there has been an apparent lack of progress following the grant of permission for the development in 2010, WYG is concerned that, whilst this development would meet St Helen's future needs over the medium to long term, there is a danger that the scheme may not be realised. Our concern is particularly acute given current market conditions and the relative lack of demand from comparison goods retailers for additional floorspace.
- 9.22 Therefore, in the short term, the Council need to carefully monitor progress and, if there is any indication that the scheme will not be delivered, then the Council may have to take a more proactive approach to securing a successful town centre scheme. The delivery of significant comparison goods floorspace over the medium to long term is considered to be essential to the future health of the centre.



Leisure Strategy

- 9.23 As evidenced by the results of the household survey – which indicates that the Borough secures a respectable market share of trips to the cinema, gym and bingo hall – we consider that the town is generally appropriately provided for in terms of its leisure offer.
- 9.24 The popularity of the bingo hall has suffered throughout the country in recent years – partly as a consequence of the smoking ban – and we believe it unlikely that there will be significant commercial interest in adding to St Helens’s principal bingo destinations (the Hippodrome Social Club and Mecca Bingo) in the near future.
- 9.25 The single cinema in the Borough is the Cineworld at Chalon Way West in St Helens Town Centre, which has 11 screens, with 10 further screens being provided elsewhere in the Study Area at the Odeon in Warrington. There are further cinemas accessible to the Study Area in Liverpool, Wigan and at the Trafford Centre.
- 9.26 Recent research²⁶ indicates that throughout the UK there is an average of six screens per 100,000 people. Given that the Study Area population at 2011 is estimated to be 343,700 people, this would suggest a requirement for around 20.6 screens. On this basis, the 21 screens provided at St Helens Cineworld and Warrington Odeon, and at other locations beyond the Study Area, are considered to be represent an appropriate level of provision.
- 9.27 The survey also indicates that a relatively wide number of gyms are used in St Helens, Earlestown, Newton-le-Willows and Haydock, which appear to act to appropriately meet demand.
- 9.28 Accordingly, the single obvious deficiency in the town’s leisure offer relates to the lack of ten-pin bowling. It is recommended that the Council acts to encourage any appropriate proposal to provide such a facility in an appropriate location, as this would fill a clear gap in the Borough’s leisure offer. Generally, future leisure proposals will be judged on their general merits in accordance with relevant local and national town centre policy. It is considered that greatest opportunity to attract additional leisure operators to the town will be through the incorporation of leisure uses as part of larger mixed-use development. Any such appropriate opportunities should be encouraged so as to further enhance the overall offer of St Helens Town Centre.

²⁶ 2011 BFI Statistical Yearbook, August 2011.

**St Helens and Earlestown Retail and Town Centre
Uses Study**



Appendices



**St Helens and Earlestown Retail and Town Centre
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Appendix 1 – Plan of the Defined Study Area



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Appendix 2 – Household Survey



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Appendix 3 – On-Street Survey



**St Helens and Earlestown Retail and Town Centre
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Appendix 4 – Business Surveys



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Appendix 5 – Health Check Assessments



**St Helens and Earlestown Retail and Town Centre
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Appendix 6 – Quantitative Capacity Tables





**Appendix 7 – Earlestown Primary Shopping Area
Definition**

