Cheshire West and Chester Retail Study

Volume 4: Centre Health Checks

Prepared for:

Cheshire West and Chester Council

March 2025

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Contents

1. Introduction

1. This appendix provides the findings of qualitative and quantitative assessments of the principal centres located within Cheshire West and Chester: Chester; Ellesmere Port; Northwich; Winsford; Neston; and Frodsham.

2. The health check provides an overview of the relative health of the principal centres by examining the centres' current vitality and viability based on the key performance indicators (KPIs) set out in the Planning Practice Guidance (PPG). The PPG states the following twelve KPIs may be relevant in assessing the health of the town centres and planning for the future:

   - diversity of uses;
   - proportion of vacant street level property;
   - commercial rents and yields on non-domestic property;
   - customers' experience and behaviour;
   - retailer representation and intentions to change representation;
   - pedestrian flows;
   - accessibility;
   - perception of safety and occurrence of crime;
   - state of town centre environmental quality;
   - balance between independent and multiple stores;
   - barriers to new businesses opening and existing businesses expanding; and
   - extent to which there is an evening and night-time economy offer.

3. The **diversity of uses** indicator is informed by survey data provided by Experian Goad (where available) which has been subsequently updated based on LSH site visits and examines the current number of outlets and quantum of floorspace for each commercial category. These are Convenience and Comparison Retail, Leisure Services (including food and drink outlets, 'games of chance' venues (e.g. casinos, bingo halls, gambling arcades, and betting shops), sports and leisure facilities, night clubs, cinemas, theatres, concert halls and hotel/guesthouse accommodation), Retail Services (including health and beauty services (beauty salons, tattoo parlours etc.), post offices, dry cleaners & laundrettes, travel agents, photo processing outlets & studios, and other personal services) and Financial & Business Services. Vacancies are also discussed separately.

4. **Pedestrian flows** are considered with reference to footfall data from MSCI Property Intel who harvest data from over 10 million mobile devices. All data is fully anonymised and GDPR compliant. Data is collected daily and MSCI Property Intel can identity footfall levels at different times of the day. The heat maps included in the report also identify concentrations of footfall, green indicating lower levels and orange/red higher concentrations.

5. **Retailer representation** is informed by the site visit. Future retailer requirements are obtained from the Requirement List, which identifies operators' known target locations.

6. **Commercial property indicators** are informed using a variety of sources, including PROMIS, CoStar, and speaking to agents to gather on-the-ground information on current market trends for rents and yields.

7. For **crime and safety**, a postcode within each town centre is chosen as a central point with a ¼ mile radius created to gather crime data within that area for a range of crimes. The crime data, obtained from UK Crime Stats, can be compared across recent years to show any trends. Heatmaps have been generated to highlight where the occurrence of crimes in an area are concentrated.

8. The KPIs help to identify the critical Strengths and Weaknesses of each centre; the Opportunities for future sustainable development; and any current and potential Threats to their overall vitality and vitality, summarised in the main report.

9. The findings of the health check assessments are set out in the following proformas.

2. Chester City Centre Health Check

Overview

10. Chester City Centre is a regional retail, leisure, and tourism destination. It attracts visitors from across the North West of England, North Wales, and across the UK. Its retail and leisure composition is reflective of its City status and the role it plays in the centres hierarchy and the retail and leisure landscape of Cheshire West and Chester.

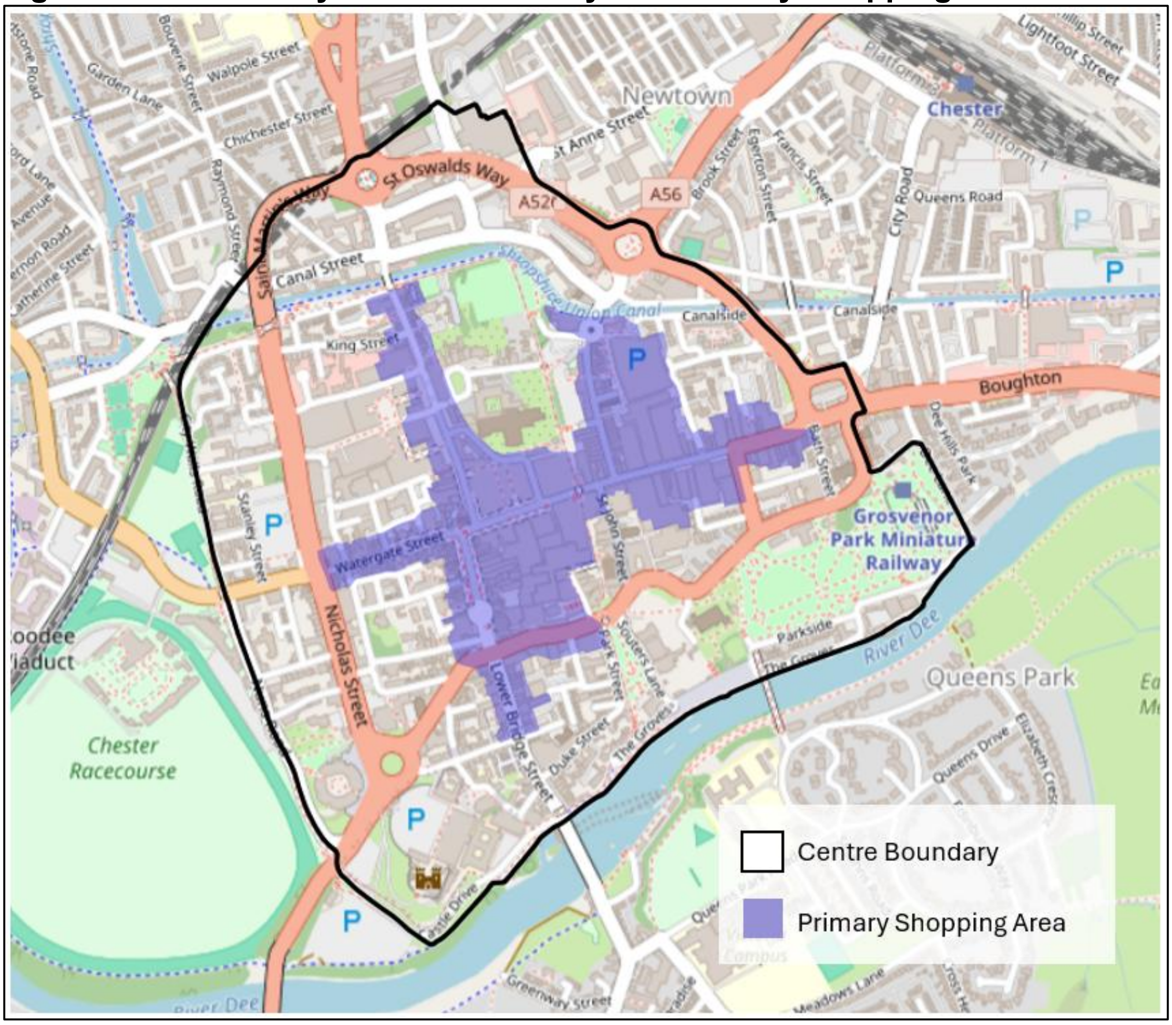
11. The City Centre benefits from a varied retail offer, with the composition including independent boutiques and national multiple brands. The retail experience within the City Centre is enhanced by the unique historic architecture of the city, for example 'The Rows' which comprises of two-tiers with the shopping offer experienced at both ground-level and at an upper-level via a continuous walkway.

12. In addition to its retailing offer, Chester also boasts a vibrant leisure scene, and a strong food and beverage offer. The leisure offer includes the Storyhouse theatre, cinema, library and restaurant which opened in 2017 and offers a range of leisure and cultural activities. The City's food and beverage offer includes a diverse and wide range of restaurants, cafes, bars, and public houses as well as the Indoor Market with its associated mix of traders and food & beverage offer, and wider Northgate development with cinema & hospitality units that make a valuable contribution to Chester's role as a leisure destination.

13. Collectively these attributes help to sustain Chester's role as a key retail and leisure hub that welcomes local shoppers, as well as tourist visitors.

14. Chester's strong retail, leisure, and tourism means that it is a significant regional destination. Notwithstanding this, it faces retail and leisure competition from the other larger cities within the region including Liverpool and Manchester and their differing offers. Chester also faces competition from the unique retailing offer of the Cheshire Oaks Designer Outlet (the popular shopping destination located near Ellesmere Port within the Cheshire West and Chester authority boundary), the nearby Coliseum Shopping Park, and Broughton Shopping Park located within Flintshire adjacent to the Cheshire West and Chester authority boundary.

Figure 1: Chester City Centre Boundary and Primary Shopping Area



Diversity of Uses

15. Experian Goad data from July 2024 has been used to assess Chester's diversity of uses. The figure below shows the area covered by Goad.

Figure 2: Chester Goad Plan

Source: Experian Goad

16. The table below shows that Chester has a total of 727 outlets and that commercial uses comprise a total of 180,300 sqm of gross floorspace. It should be noted that the previous Cheshire Retail Study (published in April 2016) identified that there were 715 units and 178,600 sqm of floorspace within Chester City Centre at August 2015. It is therefore clear that the overall scale of the City Centre offer is relatively unchanged in recent years.

Figure 3: Outlets and Floorspace

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% Total Floorspace	
		Chester	UK Average		Chester	UK Average
Comparison Retail	211	29.0%	26.4%	53890	29.9%	29.4%
Convenience Retail	45	6.2%	9.3%	15150	8.4%	15.6%
Retail Services	71	9.8%	15.9%	8310	4.6%	7.3%
Leisure Services	210	28.9%	25.8%	47400	26.3%	26.7%
Financial & Business Services	52	7.2%	8.3%	13390	7.4%	6.3%
Vacant	138	19.0%	14.1%	42160	23.4%	14.2%
Total	**727**	**100%**	**100%**	**180300**	**100%**	**100%**

Source: Experian Goad (July 2024)

17. The composition of outlets within Chester demonstrates that the provision of both comparison and leisure service outlets exceed the UK average, and that the

provision of convenience retail, retail services, and financial & business services are less than the UK average.

18. As a regional centre, it is unsurprising that the proportion of commercial units in comparison retail use exceeds the UK average figure (29.0% vs 26.4%). Likewise, it is unsurprising that the proportion of floorspace dedicated to comparison retail exceeds the UK average (albeit this is closer at 29.9% vs 29.4%). The composition of comparison retail within the centre includes many national multiples (such as Home Bargains, JD Sports, Marks and Spencer, Next, and Primark). When compared against the previous health check assessment, the number of comparison outlets has reduced from 276 (equating to 38.6% of all units) to 211 comparison outlets (equating to 29%), and the quantum of gross floorspace in this use has decreased from 74,365 sqm to 53,890 sqm.

19. Convenience retail provision in Chester City Centre is below the UK national average figure, with the identified 45 outlets comprising 6.2% of commercial units within Chester (against the UK average of 9.3%). The quantum of floorspace (15,150 sqm) associated with convenience retail also falls below the UK average (8.4% vs 15.6%). The largest convenience retail unit in Chester City Centre is the Tesco superstore, which comprises 6,070 sqm of gross floorspace.

20. Chester market also accounts for 2,390 sqm of gross floorspace and Iceland Foods for 1,120 sqm. The remaining convenience floorspace comprises of units that are sized between 20 sqm and 590 sqm. The number of outlets operated by convenience retailers is broadly consistent with that identified in the previous health check assessment (46 were previously identified in August 2015). However, the associated floorspace has reduced by 2,680 sqm which is reflective of the reduced take up of floorspace as a whole.

21. The provision of retail services and financial & business services outlets (9.8% and 7.2%) fall below the respective UK average figures (15.9% and 8.3%). Collectively these two types of service uses account for 123 of the 727 commercial units within Chester.

22. The quantum of floorspace (8,310 sqm) associated with retail services is also below the UK average (4.6% vs 7.3%). When compared to the previous health check assessment, the number of retail service units in Chester City Centre has decreased from 74 units in August 2015 to 71 units in July 2024. The associated level of gross floorspace dedicated to this use has decreased from 9,525 sqm to 8,310 sqm. The most significant retail service sub-sector is the health and beauty category, which comprises 2,260 sqm of gross floorspace. Other retail services include opticians, travel agents, and Post Offices.

23. The proportion of commercial outlets in financial & business services use in Chester City Centre is below the national average position (7.2% locally compared to 8.3% nationally), however, the proportion of floorspace in such use exceeds the UK average (7.4% vs 6.3%). For comparison in the previous health check assessment (August 2015), financial & business services made up 7.3% (52 units) of the total number of outlets and occupied 5.3% (9,530 sqm) of the total floorspace. This demonstrates that the financial & business services offer across the centre remains

stable, with and increased quantum of floorspace occupied by financial & business services. The composition of financial & business services is also unsurprising given the position of Chester within the hierarchy of centres in Cheshire West and Chester. Financial, legal and property services occupy a significant proportion of the financial & business service outlets (32 units in total). National high street banks and building societies still present in Chester include Barclays, Halifax, HSBC, Lloyds, Nationwide, NatWest, Santander, Skipton, and the Yorkshire Building Society.

Figure 4: Food & Beverage Outlets and Floorspace

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% Total Floorspace	
		Chester	UK Average		Chester	UK Average
Bars and Wine Bars	43	5.9%	2.3%	9850	5.5%	2.4%
Cafes	52	7.2%	5.1%	7070	3.9%	2.9%
Fast Food & Takeaway	23	3.2%	6.1%	3140	1.7%	3.1%
Public Houses	30	4.1%	2.6%	9460	5.2%	3.4%
Restaurants	38	5.2%	5.1%	7470	4.1%	4.3%
Total	**186**	**25.6%**	**21.2%**	**36990**	**20.5%**	**16.1%**

Source: Experian Goad (July 2024)

24. On the whole Chester has a higher proportion of Food and Beverage outlets (25.6% vs 21.2%) and floorspace (20.5% vs 16.1%) than the UK average position. The proportion of bars & wine bars outlets (5.9%) and associated floorspace (5.5%) significantly exceeds the UK average (2.3% and 2.4%, respectively). Cafes and public house outlets and floorspace also exceed the UK average. The provision of restaurants is broadly consistent and marginally exceeds the UK average (5.2% vs 5.1%) – however, the quantum of floorspace is marginally below the UK average (4.1% vs 4.3%).

25. The above average offer is unsurprising given that Chester City Centre is a regional destination for food and beverage – this data demonstrates that there is a strong food and beverage offer focused around bars, public houses, and restaurants. Notable food & beverage national multiples within the centre include Costa Coffee, Caffé Nero, Starbucks, McDonald's, and Nando's. This is balanced by a range of independent operators, including Chez Jules in Chester (French restaurant), Shrub (vegan restaurant), Moules a Go-Go (bar, café and bistro), Marmalade (café) and Just Coffee Chester (coffee shop). These and other independent operators play a key role in creating Chester's unique and distinctive food & beverage offer.

26. The proportion of fast food and takeaways is significantly below the UK average, and accounts for only 3.2% of the total number of units, and 3,140 sqm of the total floorspace.

27. There is an extensive provision of food & beverage outlets which is spread out across the centre including within the new indoor Chester Market at Exchange Square and Coachworks Arcade Chester.

Vacancies

28. As set out by GOAD there are a total of 138 vacant outlets in Chester which represents 19.0% of the overall outlets (higher than the UK average of 14.1%). In total, 23.4% of the floorspace (45,230 sqm) in Chester is vacant (compared to the UK average of 14.2%). This represents an increase from the previous health check assessment which identified 94 vacant units in August 2014 (equating to 13.1% of units) comprising of 21,180 sqm of floorspace (equating to 11.9% of floorspace).

29. The increased figures presented need to be contextualised to accurately reflect redevelopment priorities and the assembly of regeneration sites across the centre.

30. The data identifies that 17.1% of vacant floorspace (7,190 sqm) is located within the Grosvenor Shopping Centre, with 16 outlets vacant. The vacancy rate of the Grosvenor Shopping Centre has been adversely affected by the closure of Debenhams in early 2021, when the company entered liquidation resulting in 3,880 sqm of floorspace (54.0% of the total vacant floorspace within the shopping centre). It should be noted that the floorspace relating to the vacant Debenhams unit only reflects the ground floor (as recorded by Goad). We understand that the actuality of floorspace associated with the vacant Debenhams store may in the region of 15,500 sqm – when accounting for the four floors. Other vacant units range in size from 20 sqm up to 570 sqm.

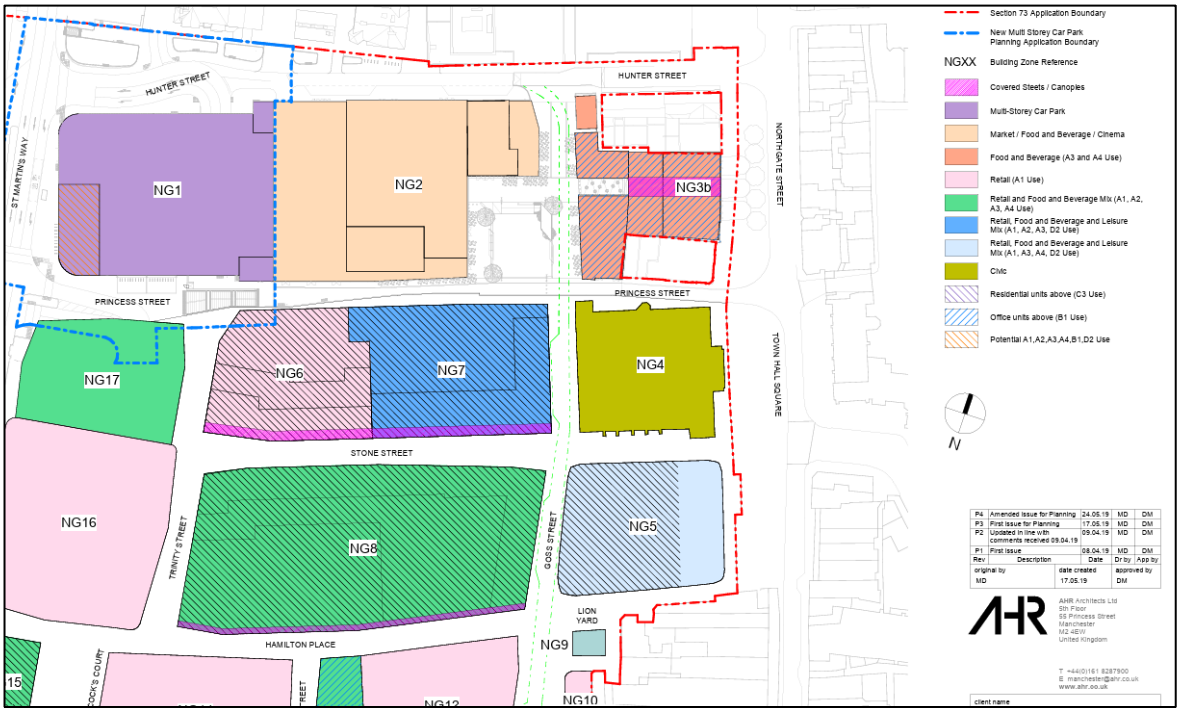
31. In respect of the closure of Debenhams we do understand that in January 2025 planning permission was granted for H Beauty (an offshoot of the Harrods Department Store) to occupy c. 2250 sqm of floorspace on the ground floor of the former Debenhams store.

32. A further 17 outlets are recorded by Experian Goad as being ‘under alteration’ within the Forum Shopping Centre following its closure in 2022. These outlets collectively comprise of 3,190 sqm of floorspace, accounting for 7.6% of vacant units within the City Centre as a whole.

33. A further 4,000 sqm is identified as vacant on Princess Street immediately adjacent to the Forum Shopping Centre and is associated with the former Chester Market.

34. The closure and current vacant nature of these units within the Forum Shopping Centre and the Market is part of the Council’s strategy to prepare this area for future phases of the Northgate development pursuant to LPA Ref: 16/02282/OUT (as amended by LPA Ref: 19/02222/S73). Units NG5, NG6, NG7 and NG8 as denoted by the approved parameters plan below identify that retail and food and beverage are earmarked as the future identified land uses.

Figure 5: LPA Ref: 19/02222/S73 – Parameters Plan



35. When accounting for the removal of the vacant units that are under alteration within the Forum Shopping Centre together with the former Market, the total number of outlets vacant within Chester reduces to 120 and the total of vacant floorspace reduces to 34,970 sqm.

36. The impact of the removal of these vacant outlets on the composition of outlets as a whole, and on the vacancy rate for Chester is set out in the figure below.

Figure 6: Diversity of Use Table (accounting for the removal of 'vacant under alterations' outlets and floorspace of the Forum Shopping Centre and Market)

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% Total Floorspace	
		Chester	UK Average		Chester	UK Average
Comparison Retail	211	29.8%	26.4%	53890	31.1%	29.4%
Convenience Retail	45	6.3%	9.3%	15150	8.8%	15.6%
Retail Services	71	10.0%	15.9%	8310	4.8%	7.3%
Leisure Services	210	29.6%	25.8%	47400	27.4%	26.7%
Financial & Business Services	52	7.3%	8.3%	13390	7.7%	6.3%
Vacant	120	16.9%	14.1%	34970	20.2%	14.2%
Total	**709**	**100%**	**100%**	**173110**	**100%**	**100%**

37. As the figure above shows, the overall total number of units falls from 727 to 709 and the percentage of outlets associated with each 'use' has changed accordingly (for example comparison outlets has risen from 29% to 29.8% of the overall units). The overall floorspace has fallen from 180,300 to 173,110 to account for the removal of the 3,190 sqm of floorspace associated with the 17 outlets within the Forum

Shopping Centre and the 4,000sqm associated with the former market. The number of vacant outlets is now 120 (as opposed to the 138 presented in Figure 3) – this equates to 16.9% of the total number of outlets (as opposed to the 19% presented in Figure 3). The quantum of vacant floorspace has fallen from 42,160 sqm to 34,970 sqm, resulting in the total percentage of floorspace vacant falling to 20.2% (as opposed to the 23.4% presented in Figure 3). Whilst these changes are relatively marginal in the grand scheme of things, it does positively impact the vacancy position for Chester.

Markets

38. As noted in the NPPF, markets play an important role in supporting the vitality and viability of centres and local communities and there is policy support for the retention and enhancement of existing markets and creation of new ones.

39. Chester Market located in the Forum Shopping Centre closed in October 2022 after 60 years of trading. The market was relocated to a new site at the heart of the Northgate regeneration project that seeks to regenerate and revitalise this area of the City Centre.

40. The new market provides an open and modern environment and places a focus on local produce and independent stall holders. It also provides a comprehensive food and beverage offer with a wide range of food outlets, cafes, a large bar, and seating area with over 400 seats. The market in its current form offers a vibrant food and beverage destination, and an offer that is different from the traditional market format previously seen in Chester, and across other centres within Cheshire West and Chester.

41. The market is open Tuesday – Sunday between the hours of 8am – 9pm.

42. In addition to the indoor market, Chester also benefits from a regular series of outdoor markets including a farmer's markets which is held every third Saturday of the month outside the Town Hall, the Maker's Markets which is held every first Saturday of the month outside the new Chester market hall and in front of the town hall, and Christmas Market which takes place on Town Hall Square between November and December.

Retailer Requirements

43. Demand from retailers and leisure operators for representation in a centre is an important indicator of a centre's overall health and viability. The latest published market demand report is set out in the table below:

Table 1: Retailer Requirements List, Chester

Recorded Date	Operator	Sector	Min Sqm	Max Sqm
Dec 24	The Climbing Hangar	Leisure Service	1,000	2,300
Dec 24	On Air	Leisure Service	250	510

Recorded Date	Operator	Sector	Min Sqm	Max Sqm
Dec 24	Slim Chickens	Leisure Service	185	325
Dec 24	Chuck E Cheese	Leisure Service	930	1,390
Dec 24	Pizza Dawgz	Leisure Service	55	280
Dec 24	Fone World	Comparison Retail/ Retail Service	30	90
Dec 24	Brook Taverner Menswear	Comparison Retail	140	140
Dec 24	Chopstix Noodle Bar	Leisure Service	50	230
Dec 24	Bensons for Beds	Comparison Retail	370	740
Nov 24	200 Degrees Coffee	Leisure Service	110	280
Nov 24	Escape Hunt	Leisure Service	280	420
Nov 24	Amber Taverns	Leisure Service	185	185
Nov 24	Clip ‘n Climb	Leisure Service	460	460
Nov 24	Scamp & Dude	Comparison Retail	90	170
Nov 24	Cakebox	Convenience Retail	70	110
Nov 24	Sleep Haven	Comparison Retail	30	650
Nov 24	Cornish Bakery	Convenience Retail	30	280
Nov 24	Rodd & Gunn	Comparison Retail	90	230
Nov 24	Factory Outlet Sofa Superstore	Comparison Retail	460	930
Nov 24	Boojum	Leisure Service	140	230
Nov 24	Bodycare	Comparison Retail	280	460
Nov 24	iCrack	Comparison Retail/ Retail Service	25	100
Nov 24	Dickeys Barbecue Pit	Leisure Service	100	140
Nov 24	Evapo	Convenience Retail	30	90
Oct 24	Pins	Leisure Service	1,390	2,800
Oct 24	Kick Air	Leisure Service	3,700	5,600
Oct 24	Big Fang Collective	Leisure Service	1,390	3,700
Oct 24	JD Gyms	Leisure Service	1,390	2,800
Oct 24	Rush Trampoline Park	Leisure Service	2,800	5,600
Oct 24	Heavenly Desserts	Leisure Service	175	215
Oct 24	Insomnia Cookies	Leisure Service	75	140
Oct 24	My Delhi	Leisure Service	280	560
Oct 24	Subway	Leisure Service	30	185

Recorded Date	Operator	Sector	Min Sqm	Max Sqm
Oct 24	Yum Cha	Leisure Service	140	215
Oct 24	Deichmann	Comparison Retail	370	560
Sep 24	Formula One Autocentres	Retail Service	370	650
Sep 24	M&S Food	Convenience Retail	560	2,300
Sep 24	Katie O'Brien's	Leisure Service	185	740
Sep 24	Ben Sherman	Comparison Retail	90	140
Sep 24	Blank Street	Leisure Service	55	140
Sep 24	COOK	Convenience Retail	85	130
Sep 24	Consol Tanning Studio	Retail Service	115	325
Sep 24	Escapism Bars	Leisure Service	280	420
Sep 24	Gyros Street	Leisure Service	65	185
Sep 24	Willow	Leisure Service	280	420
Sep 24	Aagrah Restaurant	Leisure Service	460	460
Sep 24	The Lost Estate	Leisure Service	460	2,800
Sep 24	Olive Tree Brasserie	Leisure Service	30	650
Sep 24	House of Cavani	Comparison Retail	460	740
Sep 24	Shake Down	Leisure Service	70	140
Sep 24	Dough Club	Leisure Service	25	50
Sep 24	Menkind	Comparison Retail	140	370
Aug 24	Jamaya	Leisure Service	185	325
Aug 24	Scope	Comparison Retail	140	230
Aug 24	Hijingo	Leisure Service	560	560
Jul 24	KFC	Leisure Service	110	230
Jul 24	Baldwins Travel	Retail Service	80	110
Jul 24	Calendar Club	Comparison Retail	75	185
Jul 24	Haute Dolci	Leisure Service	15	280
Jul 24	Age UK	Comparison Retail	130	460
Jul 24	Beleza Rodizio	Leisure Service	370	460
Jul 24	Ji the Chicken Shop	Leisure Service	35	120
Jul 24	The Food Warehouse	Convenience Retail	930	1,390
		Total	**23,490**	**48,125**

Source: The Requirement List

44. As of January 2025, a review of published operator requirements identified 63 recorded requirements from retail and leisure operators since July 2024, seeking a combined maximum floorspace of up to 48,125 sqm.

45. It should be noted that these are not necessarily operators seeking representation within the centre itself but potentially out-of-centre locations and retail parks.

46. It is also possible that these operators are not looking for opportunities in Chester specifically, rather they are looking for opportunities in areas similar to and including Chester.

47. Independent/smaller operators do not tend to document their desire for retail space in the same way as the larger national multiples and fast-growing organisations, and so gauging the demand for retail space from these businesses is harder.

Commercial Rents and Yields

48. Over recent years the UK Retail sector has experienced a significant number of corporate failures, which has often resulted in Creditor Voluntary Arrangements (CVAs) or pre-pack administrations. Retailers and restaurateurs have frequently used these processes to effectively impose lower rentals, turnover rents, and flexible leases onto landlords. The upshot of this is rental levels can vary widely, even for identical shops adjacent to each other.

49. In light of the above and current vacancy rates, solvent retailers have adopted aggressive positions at lease renewal seeking to drive rents down and reduce lease commitments, regardless of comparable evidence.

50. The impact of the pandemic has exaggerated this trend, and flexible leases and turnover linked rents are becoming more common place. In many cases landlords have adopted the policy that keeping a shop occupied, and thereby mitigating void costs is preferable to maintaining a rental tone within a retail location.

51. Based on agent sources, Property Market Analysis estimate that top achievable prime rents in Chester were around £135/psqf Zone A as of mid-2024.

52. In terms of investment yields, retail as an asset class has seen a significant fall in value over the past decade. Transactional volumes in 2023 were subdued with high interest rates and global political uncertainties impacting on investor sentiment. Clearly, there are many factors that impact on town centre retail yields including lease length, tenant covenant and basis of rent review but in the broadest terms we would comment as follows:

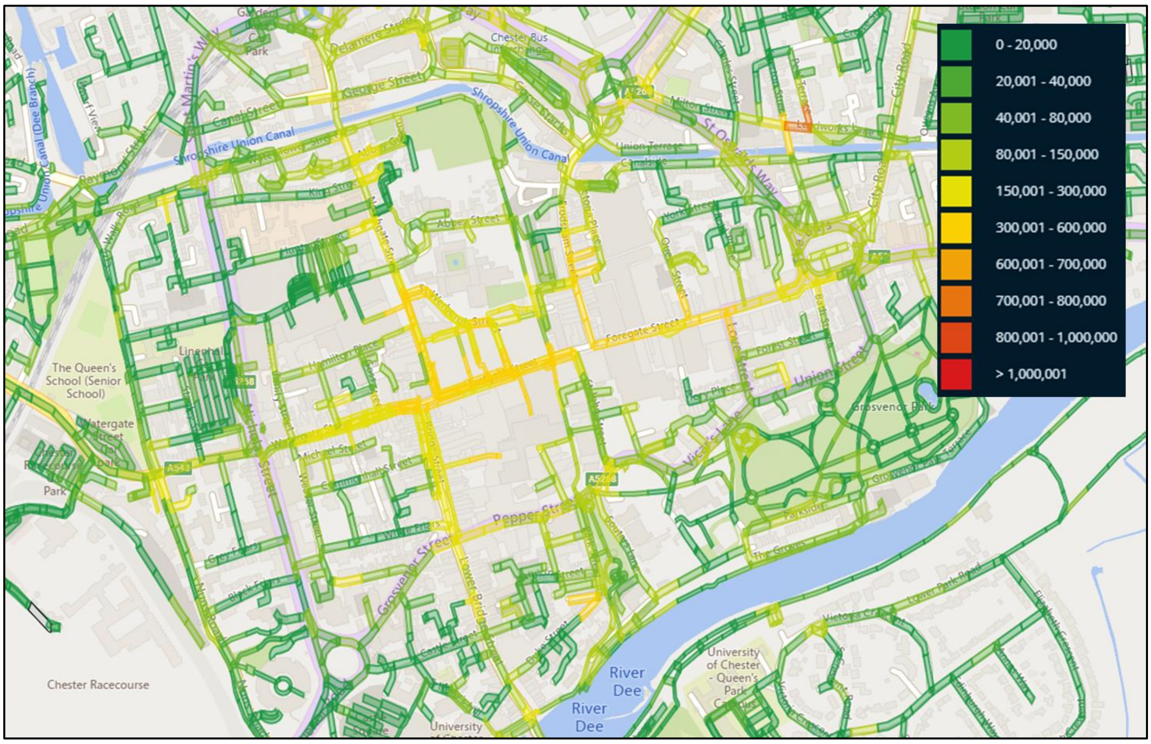
- Prime high street yields – 6.75%
- Good secondary high street yields – 9%
- Secondary high street yields – 12%.

Pedestrian Flows

53. The figure below illustrates the pedestrian flows for Chester in the form of a heat map showing total pedestrian movements for November 2024. As can be seen, it

shows a particular concentration along Foregate Street, Eastgate Steet, Bridge Street, Northgate Street, and Frodsham Street.

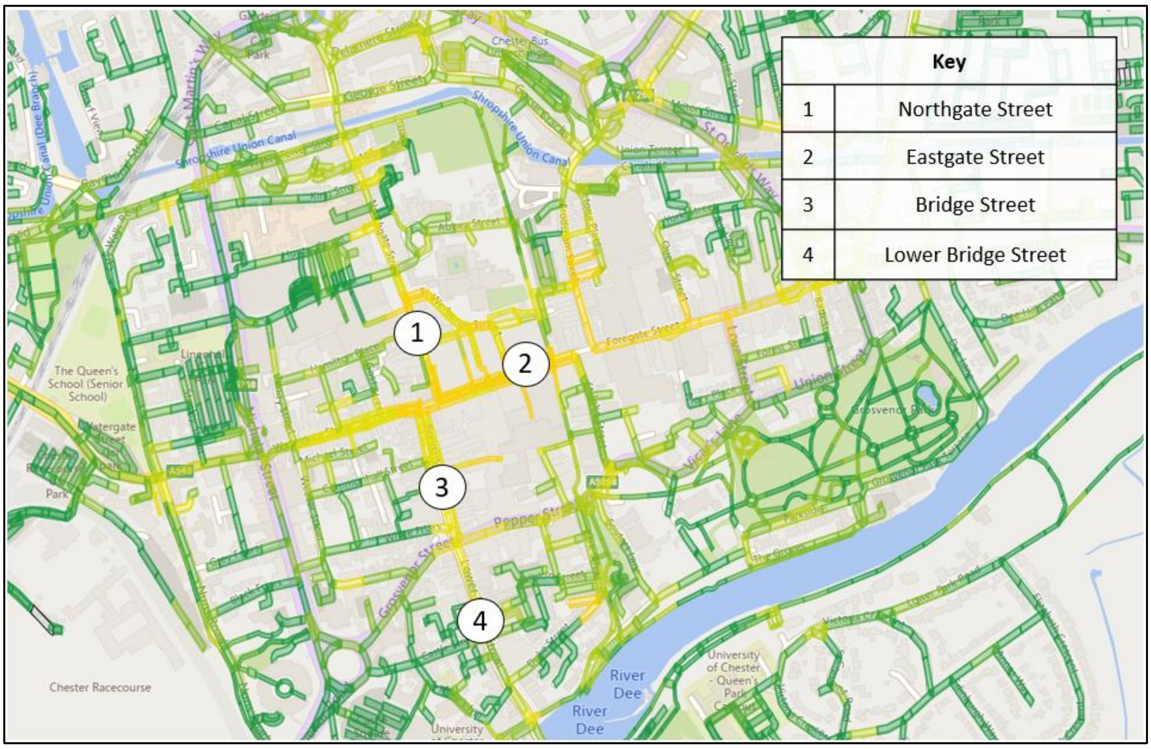
Figure 7: Chester Footfall Heat Map, November 2024



Source: MSCI

54. Four locations within the centre have been sampled to assess footfall trends over recent years: Northgate Street, Eastgate Street, Bridge Street, and Lower Bridge Street. These locations can be seen mapped in the figure below.

Figure 8: Chester Footfall Sample Locations

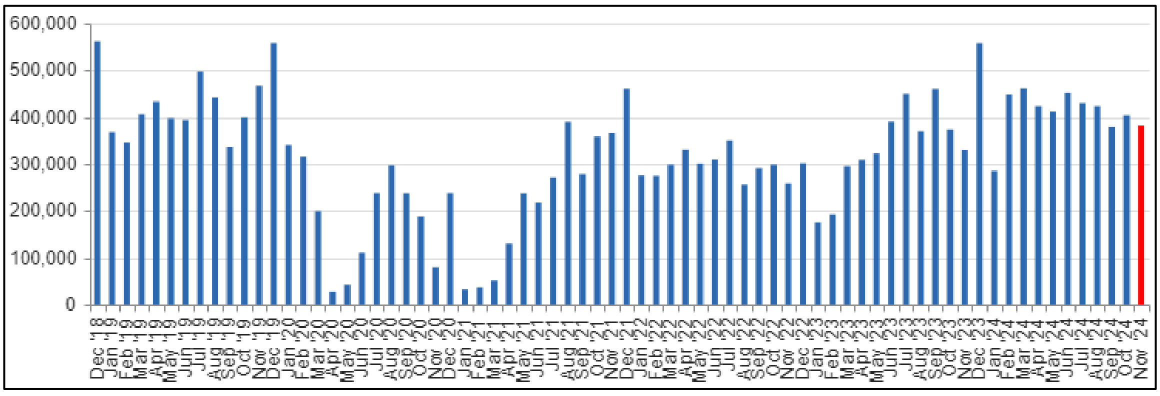


Source: MSCI

55. The figure below shows how footfall levels have changed between December 2018 and November 2024 at Northgate Street. The data shows that pedestrian activity dropped dramatically in line with the height of the pandemic-related restrictions on travel and movement (February 2020 – April 2021). Figures began to grow and stabilised from mid-2021, and activity has now returned (in the most part) to the levels seen before the pandemic in late 2019.

56. Figures for 2024 showed positive signs of consistent footfall activity. The monthly figures throughout 2024 (with the exception of January 2024) were consistently around the 400,000 mark. The activity seen throughout 2024 is much more consistent and largely surpasses that seen before the pandemic.

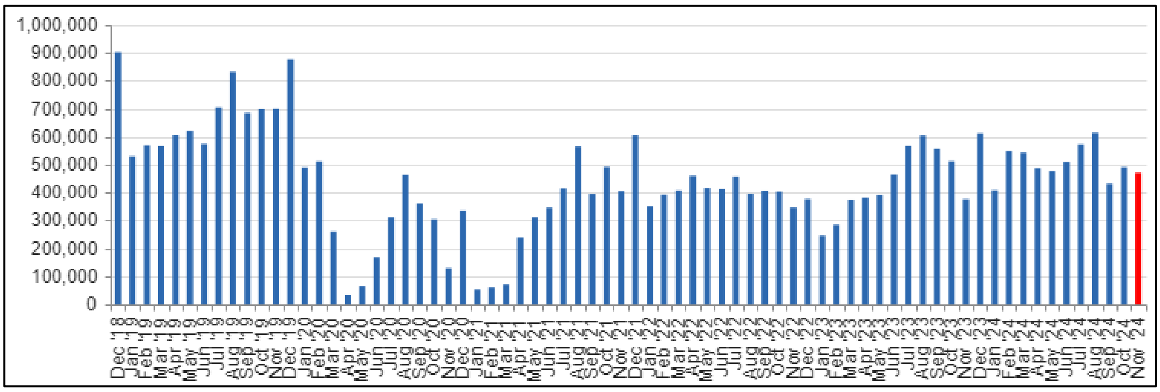
Figure 9: Monthly Footfall Activity, December 2018 – November 2024, Northgate Street



Source: MSCI

57. The figure below shows how footfall levels have changed between December 2018 and November 2024 along Eastgate Street. As can be seen pedestrian activity dropped dramatically in line with the heights of the pandemic-related restrictions on travel and movement between February 2020 – April 2021. Figures have grown and stabilised from mid-2021 onwards but have not returned to anything like the levels seen in late 2019 (600,000+). Monthly numbers are stable and are consistently above 300,000 monthly movements, with upwards of 500,000 monthly movements being surpassed on several occasions.

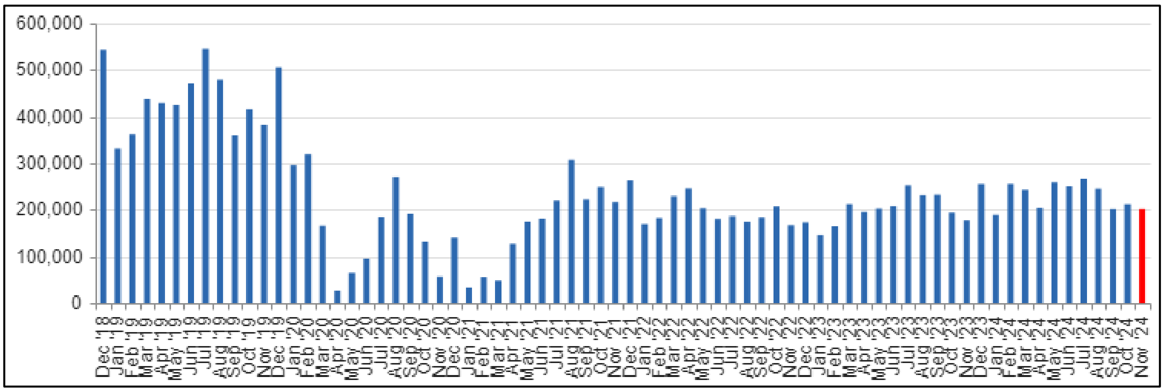
Figure 10: Monthly Footfall Activity, December 2018 – November 2024, Eastgate Street



Source: MSCI

58. The figure below shows how footfall levels have changed between December 2018 and November 2024 along Bridge Street. As can be seen pedestrian activity dropped dramatically in line with the heights of the pandemic-related restrictions on travel and movement between February 2020 – April 2021. Figures have grown and stabilised from mid-2021 onwards but have not returned to anything like the levels seen in late 2019 (300,000+). Monthly numbers are stable and are consistently around 200,000 monthly movements.

Figure 11: Monthly Footfall Activity, December 2018 – November 2024, Bridge Street

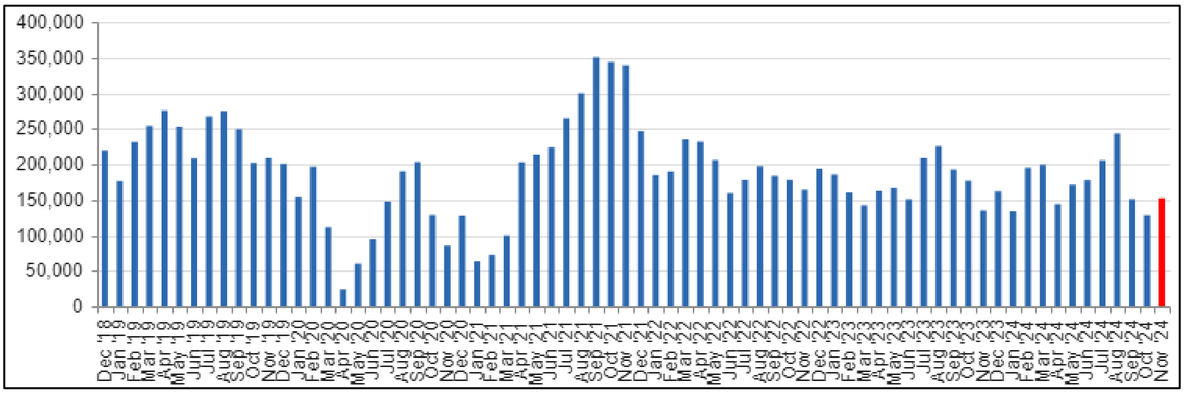


Source: MSCI

59. The figure below shows how footfall levels have changed between December 2018 and November 2024 along Lower Bridge Street. As can be seen pedestrian activity dropped dramatically in line with the heights of the pandemic-related restrictions on

travel and movement between February 2020 – April 2021. Figures have grown and stabilised since, with the peak period being September 2021 – November 2021 with footfall being around 350,000 per month. Since then, figures have decreased and have fluctuated with footfall activity ranging from below 150,000 in January 2024, up to nearly 250,000 in December 2021 and August 2024.

Figure 12: Monthly Footfall Activity, December 2018 – November 2024, Lower Bridge Street



Source: MSCI

Accessibility

60. Chester is well connected by road, with the A5268 surrounding the centre boundary. The A548 cuts off from the A5268 towards the west of the centre boundary, providing connections to the west from Garden City and beyond. The A51 cuts off from the A5268 towards the east of the centre boundary, providing connections to the east from Boughton and beyond.

61. Chester Train Station is situated beyond the centre boundary, approximately 0.6 kilometres east from the defined centre boundary. The train station provides regular services to destinations such as London, Liverpool, Manchester, Leeds, Birmingham and Cardiff.

62. Chester City Centre has ample parking provision, with the largest provision found in The New Market's multi-storey car park. Over 800 spaces are available, including disabled bays and electric vehicle charging stations. Other notable parking locations include Tesco car park (500 spaces) and Grosvenor Shopping Centre multi-storey car park (410 spaces).

63. Chester Bus Interchange is located within the centre boundary towards the northeast, providing regular bus services to destinations such as Liverpool (1), Wrexham (1), Warrington (9A) and Ellesmere Port/ Runcorn (2).

64. Cycle infrastructure, including cycle lanes, is available across the City Centre. Cheshire West and Chester have identified cycling routes around and into the city-centre from the residential areas of Chester (https://atfest.uk/links-resources/), with each colour coordinated with signage to make the routes user friendly. Cycle parking can be found in a number of locations across the centre. This includes a cycle storage space which can be found in the Cycle hub, located within New Market

Parking on Hunter Street. This has an availability of 50 cycle storage spaces, free e-bike charging and a tool station.

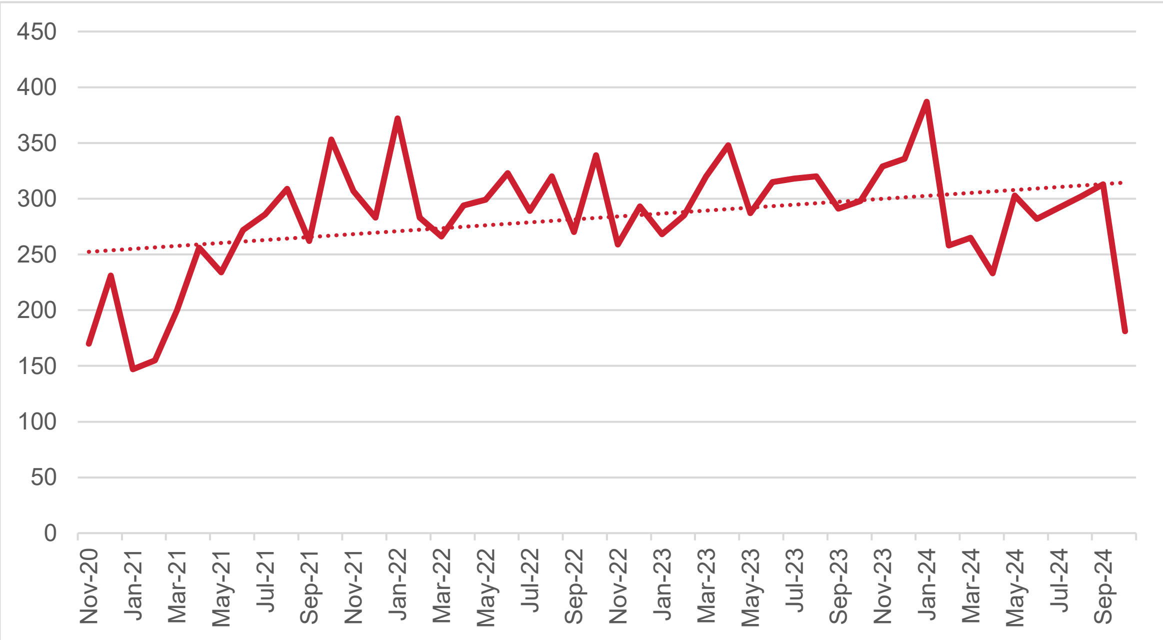
65. The pedestrian accessibility of the centre is deemed to be good, with the central core of the centre being pedestrianised during peak hours such as Northgate Street/ St. Werburgh Street Junction and Eastgate Street which provides a safe space for visitors to enjoy. Ample benches and seating areas are available across the centre, further strengthening the centre's pedestrian accessibility credentials.

Crime and Safety

66. A central postcode (CH1 1ED) within Chester was used to review total crime data within a ½ mile radius between November 2020 and October 2024. The figure below outlines the total crime rate month by month within this period, as well as a trendline to show the overall change in criminal activity over the four years.

67. As can be seen, recorded crime levels have increased over the analysis period, rising from 250 crimes committed per month to over 300. Over this period January 2024 represents the peak month for criminal activity (387 recorded crimes).

Figure 13: Chester Recorded Crimes, November 2020 to October 2024



Source: UKCrimeStats

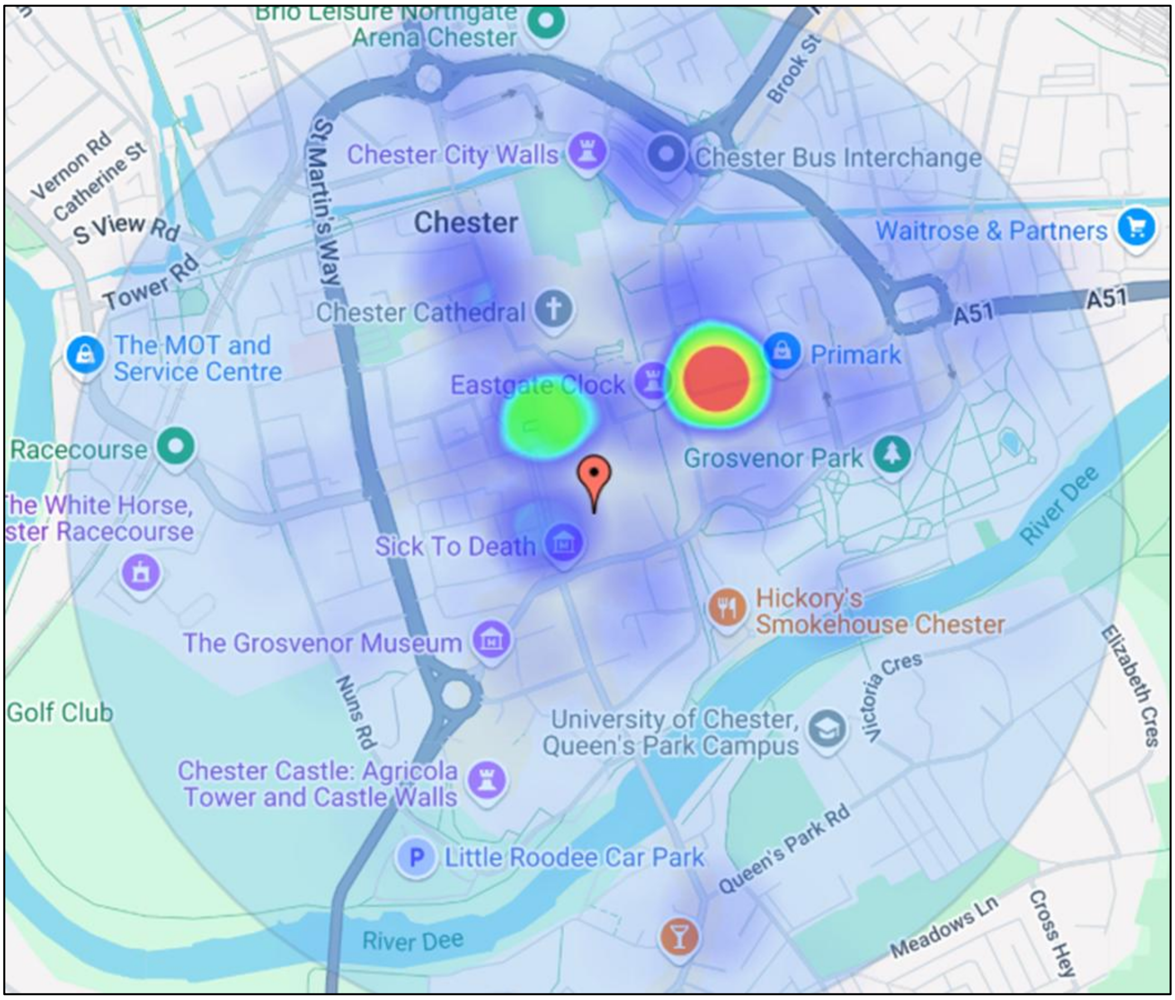
68. The figure below shows a heat map representing criminal activity within the same area and for the same period outlined previously. As can be seen, criminal activity is predominately concentrated around two locations along Foregate Street.

69. The top three types of crimes recorded within this area during this period are anti-social behaviour (2,792 recorded incidences), public order offence (1,739 recorded incidences) and shoplifting (1,573 recorded incidences).

70. In 2025 Chester has retained its Purple Flag accreditation for its evening and night-time economy having first achieved Purple Flag status in 2018. The Purple Flag

recognises the promotion of safety and wellbeing of visitors and residents using the evening and night-time economy.

Figure 14: Chester Crime Heat Map, November 2020 to October 2024



Source: UKCrimeStats

Environmental Quality

71. Chester city centre has a welcoming environmental feel, with modern and historic elements contributing to its environmental quality. The centre's strong historic atmosphere is visually distinct and attractive, which increases its appeal as a destination to spend time in and is reflective of the high proportion of leisure outlets present.

72. The centre is part of the Chester Conservation Area, a designation which seeks to protect and enhance its historic and architectural character. There are many Listed Buildings and Buildings of Special Local Interest within the centre, particularly along Eastgate Street, Northgate Street and Watergate Street, that reflects its Roman and medieval heritage. Notable listed buildings include Chester Cathedral (Grade I listed) and Ye Olde Edgar (Grade II listed). Additionally, the Chester Rows are a unique and integral feature of Chester's urban grain which reflects Chester's medieval commercial history. The numerous historical structures within Chester

provide a sense of character that enhances the town centre's visual appeal, making it a prominent tourist and architectural destination.

73. Abundant planting, greenery and decorative elements such as hanging baskets are present within the centre which enhances the overall vibrancy of the area. The centre also includes easily accessible green spaces such as Grosvenor Park and the River Dee waterfront which softens the urban environment.

74. Street furniture is of high quality, with ample benches and cycle parking within the centre. Bin provision is well-considered throughout the centre, and waste management is visible yet unobtrusive. Streetlamps are distinct and integrate well into the historic environment.

75. The quality of Eastgate Street, Northgate Street, Bridge Street and Watergate Street (and others within the centre) is impacted by its trafficked nature which gives rise to conflict between vehicles and pedestrians.

76. Overall, Chester city centre is a vibrant, dynamic, and aesthetically pleasing area, with a mix of historical and modern amenities. The overall atmosphere is welcoming, with a balance of functional spaces and attractive surroundings. However, the pedestrian environment is compromised the trafficked nature of the centres road network. Chester's city centre remains a highly desirable location for both residents and visitors, offering an engaging and immersive environment.

Evening and Night Time Economy

77. A strong evening and night time economy can often be a good indicator of a strong, vital, and viable centre. A vibrant evening and night time economy is largely underpinned by a quality leisure offer within a centre, and so a sample of predominantly leisure outlets within Chester have been selected with their opening times and more importantly closing times recorded to get a sense of the provision of the evening offer.

Table 2: Leisure Operator Sample

Retailer Name	Type	Open	Close
Picturehouse	Cinema	10am	11pm
Storyhouse	Theatre	Varies but The Kitchen restaurant opens at 8am	Varies but The Kitchen restaurant closes at 11pm
Six One Six	Bar & Restaurant	12pm – 5pm	10pm – 1am
The Botanist	Bar & Restaurant	11am	11pm
The Coach House	Bar & Restaurant	10am – 12pm	10:30 – 11:30pm

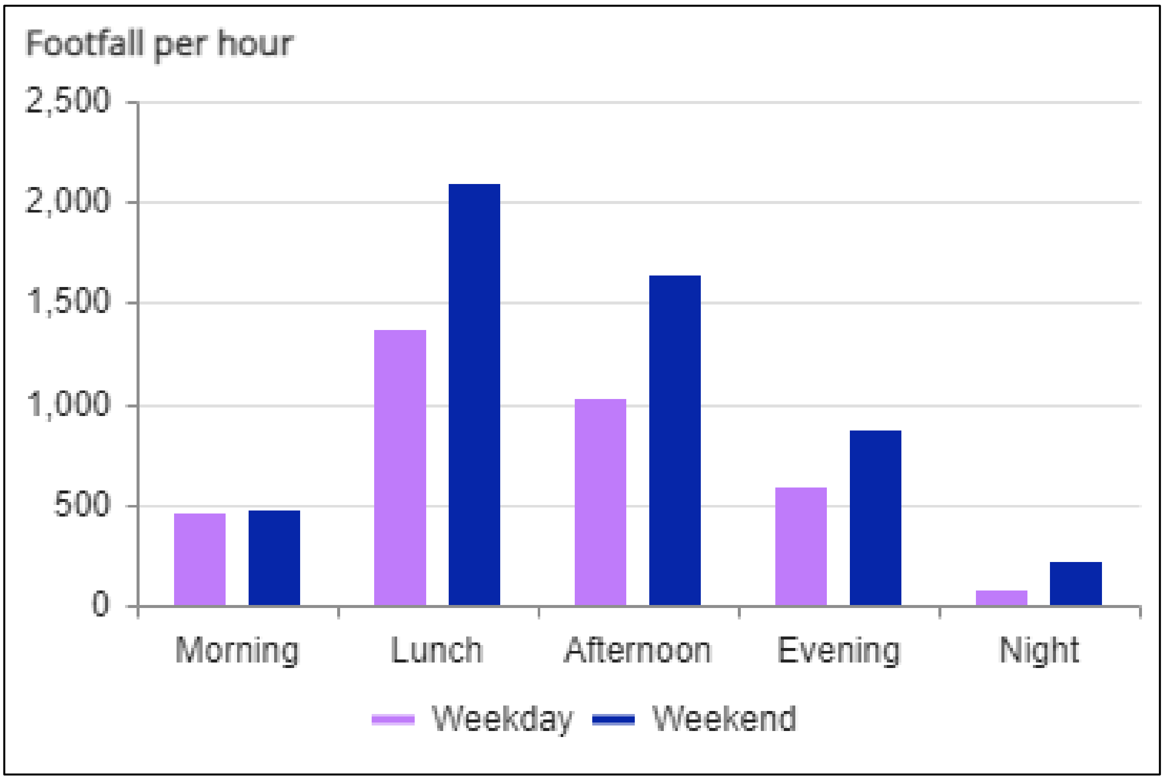
Retailer Name	Type	Open	Close
The Forge	Bar & Restaurant	12pm	9:45pm
The Love Shack	Bar	2pm – 4pm	12am – 1am
The Old Dukes	Bar	12pm – 4pm	12am
The Venetian	Bar	12pm – 5pm	1am
The Church	Bar & Restaurant	4pm	1am
The Watergates	Public House	12pm	11pm
The Brewery Tap	Public House	12pm	11pm
The Liverpool Arms	Public House	11am	11pm – 2am
The Shropshire Arms	Public House	11am	11pm – 12am
The Victoria	Public House	11am – 12pm	11pm – 2am
Ye Olde Custom House Inn	Public House	12pm	11pm
Ye Olde Kings Head	Public House	12pm	11pm – 1am
Porta Tapas Bar	Restaurants	12pm	9pm - 10:30pm
Pronto Pasta Bar Rio	Restaurants	12pm	6pm – 9pm
Brazilian Steakhouse	Restaurants	12pm	8:30pm – 10pm
Ristorante Sergio	Restaurants	12pm	9:30pm – 10:30pm
Rileys	Sports Bar	12pm	11pm – 12am

Source: LSH Research

78. The figure below shows how footfall levels differ across different parts of the day. As can be seen, footfall in an evening (5pm – 9pm) only drops as the day moves from afternoon to evening, suggesting that the area is able to retain footfall and visitors through a healthy provision of evening leisure provision on both weekdays

and weekends. The is reflective of the strong leisure offer available in Chester given its role as the key centre within Cheshire West and Chester.

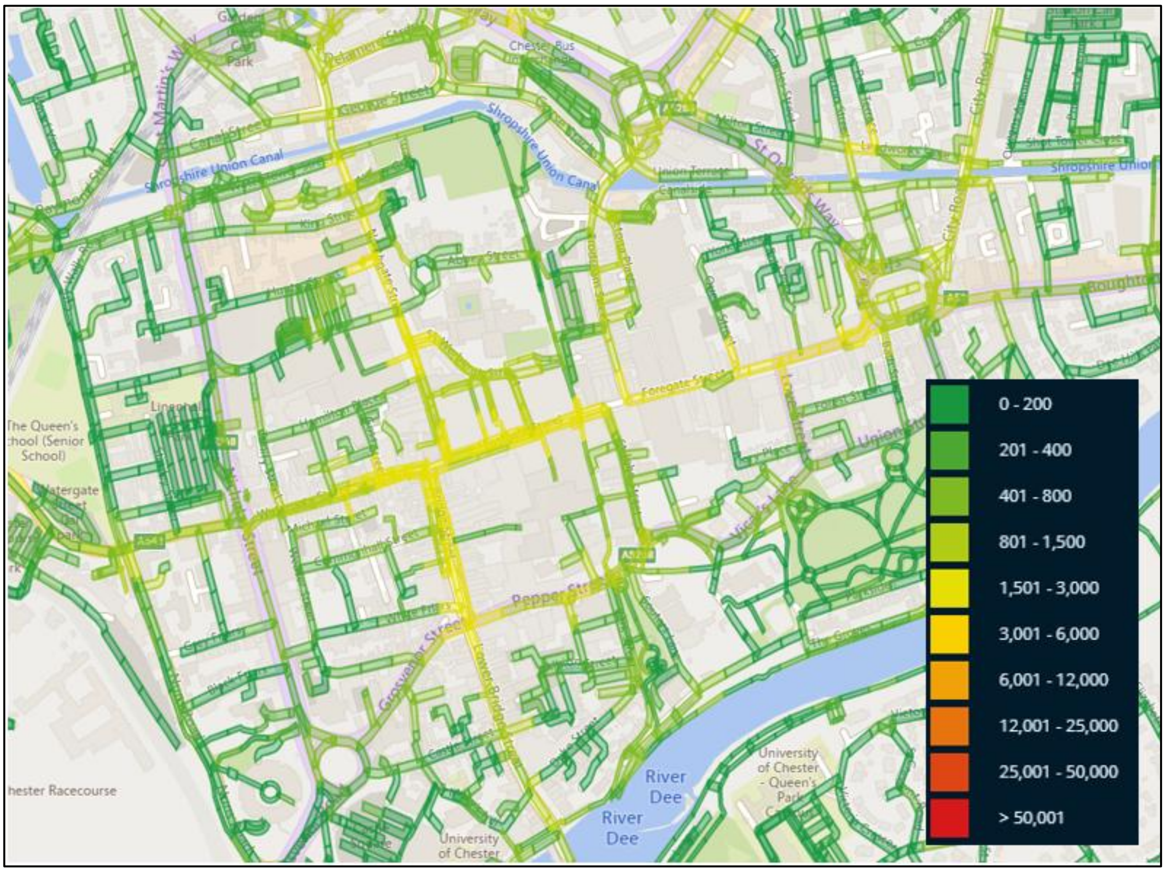
Figure 15: Evening Footfall, The Cross (November 2024)



Source: MSCI

79. The figure below illustrates the weekend evening pedestrian footfall for Chester in the form of a heat map showing movements for November 2024. As with the heat map shown within the Pedestrian Flows section above, which represented total pedestrian movements, the weekend evening pedestrian footfall also shows particular concentrations along Foregate Street, Eastgate Steet, Bridge Street, Northgate Street, and Frodsham Street.

Figure 16: Chester Weekend Evening Footfall Heat Map, November 2024



Source: MSCI

Conclusion

80. Overall, the Strengths, Weaknesses, Opportunities, Threats (SWOT) for Chester City Centre can be summarised as follows.

Strengths

- Chester's status as a regional retail, leisure and tourism destination means that it is well placed to attract visits from across the North West, North Wales, and elsewhere in the UK and internationally.
- Storyhouse, Picturehouse, Chester City Walls, Chester Cathedral and Chester Races as cultural and entertainment venues and attractions.
- Good presence of high street banks.
- Strong interest from a range of retailers for representation within the centre.
- Hub for national multiples/ big brands for the region.
- Strong cluster of food & beverage operators.
- The Northgate Phase 1 development has transformed the area next to the Town Hall and Storyhouse with an award-winning market and a vibrant leisure offer including new cinema, restaurants, car parking, and public square.
- Train station and bus station provide major sustainable transport hubs.

- Healthy weekday and weekend evening foot levels along Eastgate Street, Bridge Street, Watergate Street, and Northgate Street.

Weaknesses

- High vacancy rate (unit and floorspace).
- The loss of Debenhams and other fashion retailers as major anchor tenants (albeit it is important to note that Harrods is to lease part of the former Debenhams store to trade under its H Beauty brand).
- Vehicular use of roads within the centre create conflict between pedestrians and the pedestrianisation of the centre.
- Rising crime levels.
- Footfall hasn't generally recovered to pre-pandemic levels.

Opportunities

- Address the large-scale vacancies currently seen throughout the centre through a broader mix of uses (e.g. education, residential and healthcare).
- The proposed redevelopment of the former Chester Market and Forum Shopping Centre (for residential-led redevelopment) as part of the next phase of regeneration for Northgate. An increased city centre population should support additional footfall in the area.
- Further realise Chester's potential as a visitor destination, including the opportunity to provide additional overnight accommodation.
- High levels of interest from retail and leisure operators suggests good potential for future occupancy of currently vacant units.

Threats

- The potential loss of further high street brands leading to further vacancies.
- High/increasing business operating costs.
- The impacts of other nearby regional retail and leisure destinations (e.g. Cheshire Oaks) may impact on the comparison goods market share of Chester and its ability to attract new retailers.
- The need for regeneration initiatives to be delivered in a timely manner, including the wider regeneration of the Northgate area.
- Continued vacancy of units throughout the centre, including premises within Grosvenor Shopping Centre (albeit it is again noted that H Beauty is to occupy part of the former Debenhams department store premises).
- The growth in online shopping and its impact on brick-and-mortar retail outlets
- The vacancy level and associated lack of activity negatively impacting on operators' perceptions and willingness to invest.

81. We therefore conclude that Chester remains the retail and leisure hub for the region, with entertainment and cultural venues drawings in visitors that continue to support the vitality and viability of the centre.

82. Despite that, the current volume of vacant units and floorspace is both a weakness and a threat to the centre's current offer. This however provides an opportunity for

the introduction of a greater mix of uses to enhance the prosperity and vibrancy of the centre, which may be released through the comprehensive regeneration plans in place.

3. Ellesmere Port Town Centre Health Check

Overview

83. Ellesmere Port town centre is the second largest centre within Cheshire West and Chester. The centre is situated to the north west of the authority area, and benefits from direct access from the M53, and the A5032 which runs through the heart of the centre.

84. The centre principally includes the Port Arcade Shopping Centre, a mid-1980s centre and a linear 'high-street' running east-west along Whitby Road / Marina Drive which include retail / leisure outlets of varying sizes. Asda Ellesmere Port, Aldi Ellesmere Port and Ellesmere Port market are also situated within the defined centre.

85. In 2024 it was announced that over £13 million of Levelling Up Funding/Funded By Government will support the transformation of Ellesmere Port market hall/Flea Market and Active Travel links from train station to Market as well as Site Assembly for Low Carbon Homes along Coronation Road and former council offices Civic Way. Planning permission (LPA Ref: 23/02580/FUL) for the demolition and remediation of the existing Council office building was approved in February 2024.

86. The intention is to deliver investment that will stem the cycle of town centre decline through delivering new footfall and spending power into the heart of the town centre and investment into low carbon infrastructure to help mitigate against climate change and rising energy costs.

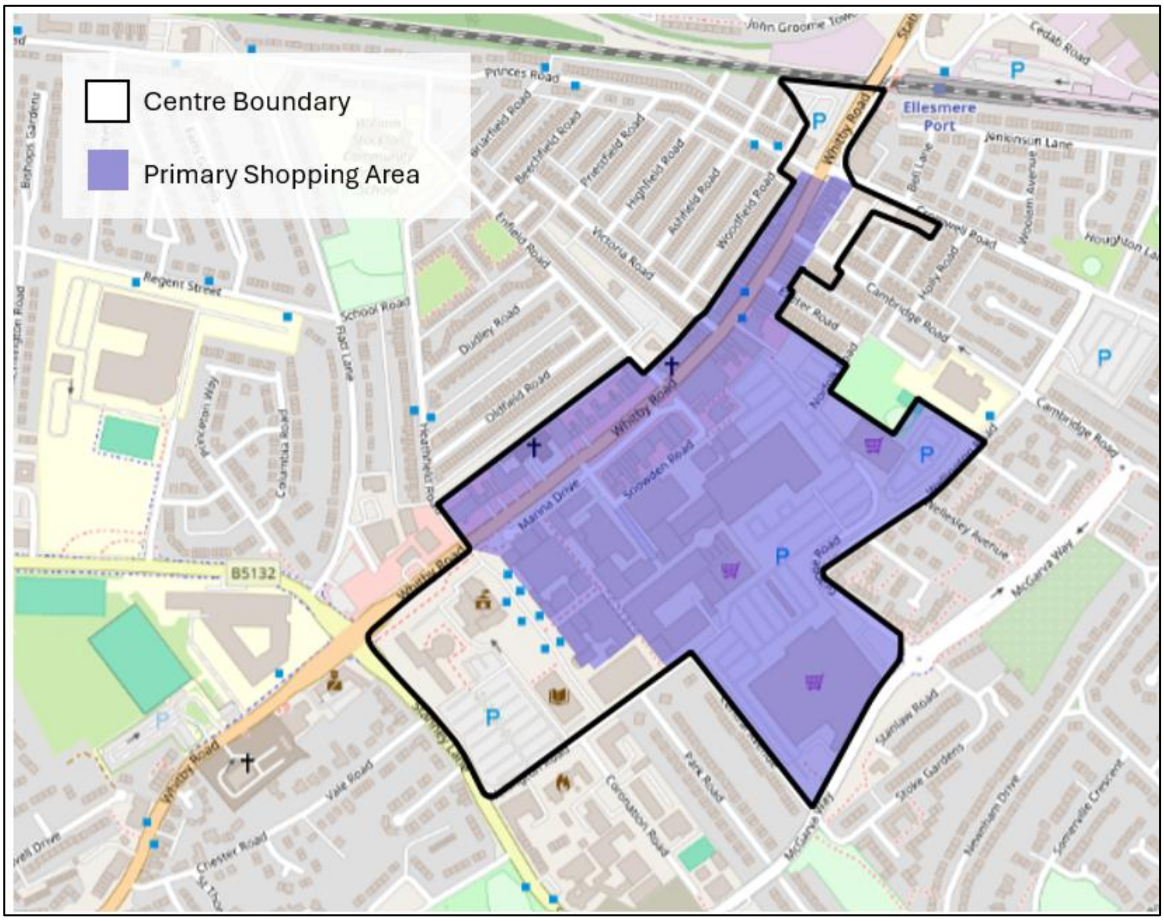
87. Civic Hall and Theatre Porto contribute to the leisure offer of Ellesmere Port, providing space for entertainment, events, performing arts and celebrations.

88. Residential development wraps around the centre on all sides – making it easily accessible for residents of Ellesmere Port.

89. Ellesmere Port is the defined centre that sits closest to Cheshire Oaks Designer Outlet Village – situated approximately 4.8 kilometres to the south of the centre. The Coliseum Leisure Park is also sited adjacent to Cheshire Oaks Designer Outlet Village.

90. The National Waterways Museum is an attractive tourism destination focused around the canal basin c. 1km to the north of the town centre beyond the M53. Given the distance between the museum and the centre, and noting the centre current offer, we believe that linked trips between the two would be limited.

Figure 17: Ellesmere Port Town Centre Boundary and Primary Shopping Area



Diversity of Uses

91. Experian Goad data has been updated based on an LSH site visit in January 2025 to provide an updated view of the retail and leisure mix within Ellesmere Port town centre. The table below shows that Ellesmere Port has a total of 184 units and an overall quantum of 54,780 sqm gross floorspace which represents a reduction in terms of both the number of outlets and the quantum of floorspace when compared to the Ellesmere Port Town Centre composition data presented in the previous Cheshire Retail Study of April 2016.

Figure 18: Outlets and Floorspace

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% Total Floorspace	
		Ellesmere Port	UK Average		Ellesmere Port	UK Average
Comparison Retail	34	18.5%	26.4%	9290	17.0%	29.4%
Convenience Retail	22	12.0%	9.3%	19710	36.0%	15.6%
Retail Services	27	14.7%	15.9%	3250	5.9%	7.3%
Leisure Services	23	12.5%	25.8%	4240	7.7%	26.7%
Financial & Business Services	17	9.2%	8.3%	3100	5.7%	6.3%
Vacant	61	33.2%	14.1%	15190	27.7%	14.2%
Total	**184**	**100%**	**100%**	**54780**	**100%**	**100%**

Source: Experian Goad and LSH Site Visits (January 2025)

92. The provision of comparison retail in terms of both the number of outlets and the quantum of floorspace falls below the UK average. Ellesmere Port's current comparison retail composition should be viewed in the context of the previous health check assessment which shows that the composition has reduced significantly since August 2015. Ellesmere Port Town Centre accommodated 57 comparison retail outlets in August 2015 (comprising of 29.7% of total commercial units), which occupied 18,606 sqm of gross floorspace (33.7% of the total quantum of commercial floorspace), which represents a total net loss of 23 comparison units and 9,316sqm of comparison floorspace between August 2015 and January 2025. The reduction in comparison retail representation is of significant concern and can be attributed to the closure of significant comparison retailers in Ellesmere Port including Poundland (1,870 sqm) which closed in February 2024 (after taking over the former Wilko outlet), and the relocation of B&M from a town centre outlet (1,750 sqm) to occupy the vacant former B&Q unit by Junction 9 of the M53.

93. Contrary to comparison retail, the analysis shows that provision of convenience retail currently exceeds the UK average is respect of both the number of outlets (12.0% vs 9.3%), and associated quantum of floorspace (36.0% vs 33.9%).[1] It also exceeds the number of outlets (15) and quantum of floorspace (18,732 sqm) identified for convenience retail in the previous health check assessment. Asda contributes a significant proportion of floorspace (8,760 sqm) to the convenience retail offer within Ellesmere Port. This, along with the Ellesmere Port market, totals 14,790 sqm of the 19,710 sqm of convenience floorspace. Other convenience operators include Aldi (1,600 sqm) and Farmfoods (450 sqm). These four operators make up 85% of convenience retail floorspace.

94. There is a lower provision of retail services both in terms of outlets and floorspace in Ellesmere Port when compared to the UK average. With 27 units covering just over 3,250 sqm of floorspace, health & beauty operators (19 outlets) dominate the offer. Other services include opticians (such as Specsavers), travel agents (Hays Travel), and the Post Office. The retail service provision is however greater than that identified in the previous health check assessment (there were 22 outlets comprising 2,091 sqm of gross floorspace in August 2015).

95. Similarly to retail services, leisure services are notably under-represented within Ellesmere Port. The total of 23 outlets equates to 12.5% of the total (compared to the UK average of 25.8%). In terms of floorspace, leisure services occupy 7.7% (4,240 sqm) of the total quantum of floorspace within Ellesmere Port, which is much lower than the UK average of 26.7%. The composition of leisure service outlets is also less than that identified in the previous health check assessment (there were 33 outlets comprising of 6,440 sqm of gross floorspace in August 2015).

[1] In the context of this analysis it should be noted that in line with the Experian Goad categorisation the Ellesmere Port market is recorded as a convenience use, therein contributing 6,030 sqm of floorspace to the overall total. In practice the provision of the market is not wholly dedicated to convenience retail and other categories of use (i.e. comparison) occupy space within the market, and in any event, at the time of undertaking the site visit a limited number of market stalls were occupied, and the majority of space unused. The contribution that the market plays to convenience provision of Ellesmere Port should be understood in this context.

96. Financial & business services provision within Ellesmere Port is broadly in line with the UK average position, both in terms of proportion of outlets and floorspace. National high street banks still present in Ellesmere Port include Halifax, Lloyds, Nationwide, and NatWest. Despite being broadly consistent with the UK average the current composition of financial & business service outlets is significantly less than that identified in the previous health check assessment (32 outlets comprising of 5,393 sqm of gross floorspace).

Figure 19: Food & Beverage Outlets and Floorspace

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% Total Floorspace	
		Ellesmere Port	UK Average		Ellesmere Port	UK Average
Bars and Wine Bars	0	0.0%	2.3%	0	0.0%	2.4%
Cafes	4	2.2%	5.1%	640	1.2%	2.9%
Fast Food & Takeaway	14	7.6%	6.1%	1380	2.5%	3.1%
Public Houses	1	0.5%	2.6%	920	1.7%	3.4%
Restaurants	4	2.2%	5.1%	600	1.1%	4.3%
Total	**23**	**12.5%**	**21.2%**	**3540**	**6.5%**	**16.1%**

Source: Experian Goad and LSH Site Visit (January 2025)

97. Whilst a higher proportion of fast food & takeaways can be found in Ellesmere Port when compared to the UK average (7.6% vs 6.1%), all other food and beverage operator types fall below the UK average. As a result, food & beverage operators as a whole make up only 12.5% of units in the centre, and 6.5% of total floorspace. Both of these proportions of the centre are significantly lower than the UK average.

Vacancies

98. There are a total of 61 vacant outlets in Ellesmere Port which represents 33.2% of the overall outlets (higher than the UK average of 14.1%). In total, 27.7% of the floorspace in Ellesmere Port is vacant – this is reflected in the feel and quality of the centre, particularly along Whitby Road.

99. The current vacant rate of the centre is also of concern when compared to the findings of the previous health check assessment which found that 33 outlets were vacant and higher than the UK average. The increased vacancy rate is as a consequence of reduced provision within the centre (relating to comparison retailing). There is a clear need to reduce the vacancy rate as this adversely affects the feel and experience of the centre. Efforts should be made to attract both additional retailers and leisure service uses to support.

Markets

100. As noted in the NPPF, markets play an important role in supporting the vitality and viability of centres and local communities and there is policy support for the retention and enhancement of existing markets and creation of new ones.

101. Ellesmere Port’s indoor market is located within the Port Arcades Shopping Centre. The market is open Monday, Tuesday, Thursday, Friday, and Saturday between 8am – 5pm, and on Sunday’s between 10am – 4pm. The market is closed on

Wednesday. The market consists of over 100 individual stalls offering a variety of good including hardware, garden, tailoring, footwear, fashion, health and beauty, electrical supplies, jewellery, and pet supplies. There are also four cafés in the market. An indoor Flea Market adjoins the market, with traders dealing in all manner of second-hand treasures. The Flea Market is open every Monday, Thursday, and Sunday from 8am until 2pm. The Market Hall has public toilets with disabled facilities.

102. Following the site visits in January 2025 it can be concluded that the market is significantly under occupied.

Retailer Requirements

103. Demand from retailers and leisure operators for representation in a centre is an important indicator of a centre's overall health and viability. The latest published market demand report is set out in the table below:

Table 3: Retailer Requirements, Ellesmere Port

Recorded Date	Operator	Sector	Min Sqm	Max Sqm
Jun 24	Clifton Trade Bathrooms	Comparison Retail	420	650
Apr 24	PDSA	Comparison Retail	90	185
Mar 24	Lidl	Convenience Retail	1,700	2,500
Sep 23	Sense	Comparison Retail	110	560
Aug 23	Poundstretcher	Comparison Retail	560	2,800
		Total	**2,880**	**6,695**

Source: The Requirement List

104. As of January 2025, a review of published operator requirements identified five recorded requirements from retail and leisure operators since August 2023, seeking a combined maximum floorspace of up to 6,695 sqm.

105. It should be noted that these are not necessarily operators seeking representation within the centre itself but potentially out-of-centre locations and retail parks.

106. It is also possible that these operators are not looking for opportunities in Ellesmere Port specifically, rather they are looking for opportunities in areas similar to and including Ellesmere Port.

107. Independent/smaller operators do not tend to document their desire for retail space in the same way as the larger national multiples and fast-growing organisations, and so gauging the demand for retail space from these businesses is harder.

Commercial Rents and Yields

108. Over recent years the UK Retail sector has experienced a significant number of corporate failures, which has often resulted in Creditor Voluntary Arrangements

(CVAs) or pre-pack administrations. Retailers and restaurateurs have frequently used these processes to effectively impose lower rentals, turnover rents, and flexible leases onto landlords. The upshot of this is rental levels can vary widely, even for identical shops adjacent to each other.

109. In light of the above and current vacancy rates, solvent retailers have adopted aggressive positions at lease renewal seeking to drive rents down and reduce lease commitments, regardless of comparable evidence.

110. The impact of the pandemic has exaggerated this trend, and flexible leases and turnover linked rents are becoming more common place. In many cases landlords have adopted the policy that keeping a shop occupied, and thereby mitigating void costs is preferable to maintaining a rental tone within a retail location.

111. A broad estimate of prime rental tone within Ellesmere Port has been analysed based on Whitby Road / Marina Drive and the Port Arcades Shopping Centre. This indicates a rental level in the region of £20/sqft – £25/sqft. Council officers however consider these rental estimates to be too high and suggest that a £10/sqft to £12/sqft range may be more realistic.

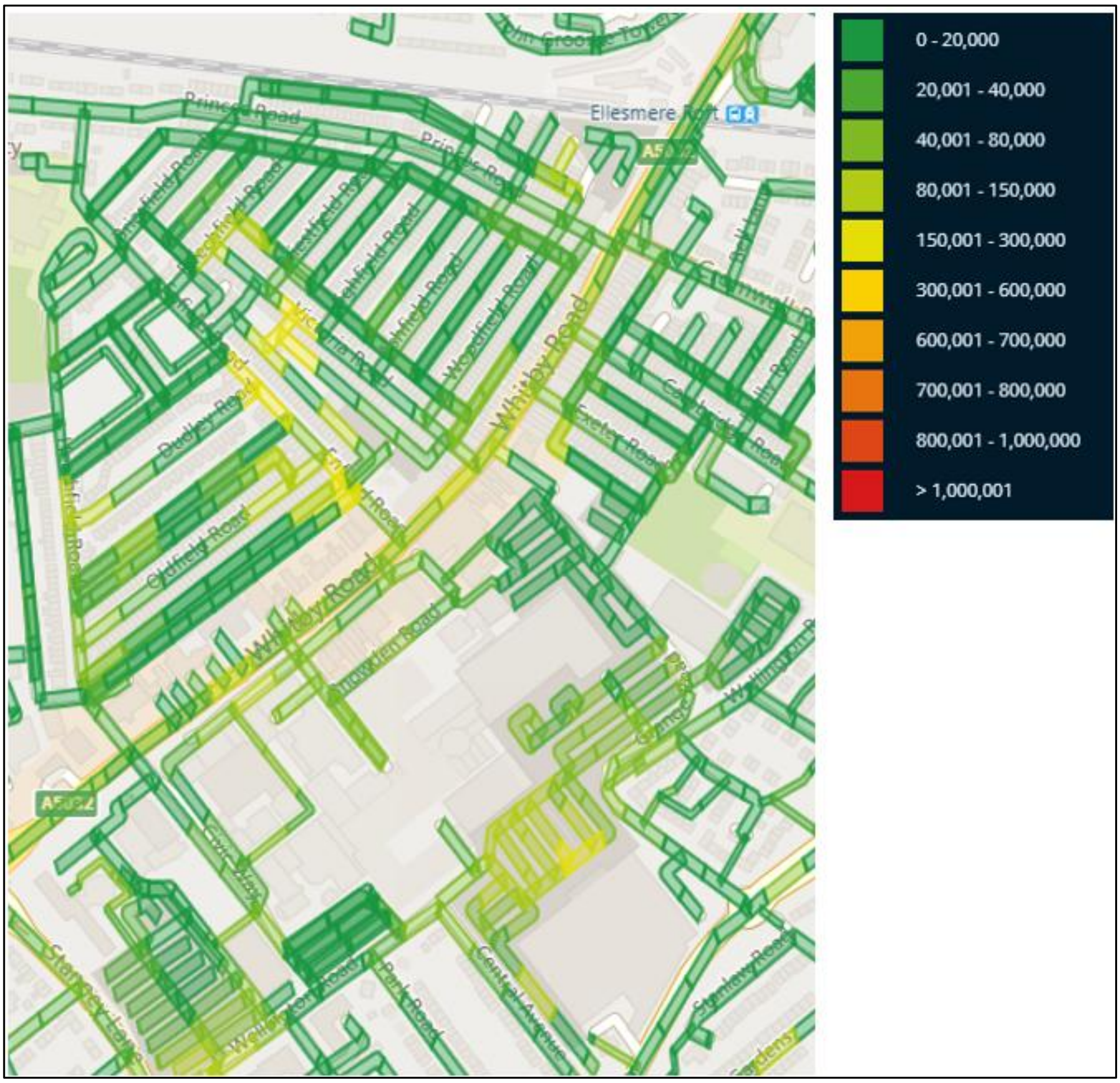
112. In terms of investment yields, retail as an asset class has seen a significant fall in value over the past decade. Transactional volumes in 2023 were subdued with high interest rates and global political uncertainties impacting on investor sentiment. Clearly, there are many factors that impact on town centre retail yields including lease length, tenant covenant and basis of rent review but in the broadest terms we would comment as follows:

- Prime high street yields – 6.75%
- Good secondary high street yields – 9%
- Secondary high street yields – 12%.

Pedestrian Flows

113. The figure below illustrates the pedestrian flows for Ellesmere Port in the form of a heat map showing total pedestrian movements for November 2024. As can be seen, shows the concentration of footfall within Ellesmere Port is along Whitby Road, with some concentrated footfall spilling into connecting streets.

Figure 20: Ellesmere Port Footfall Heat Map, November 2024

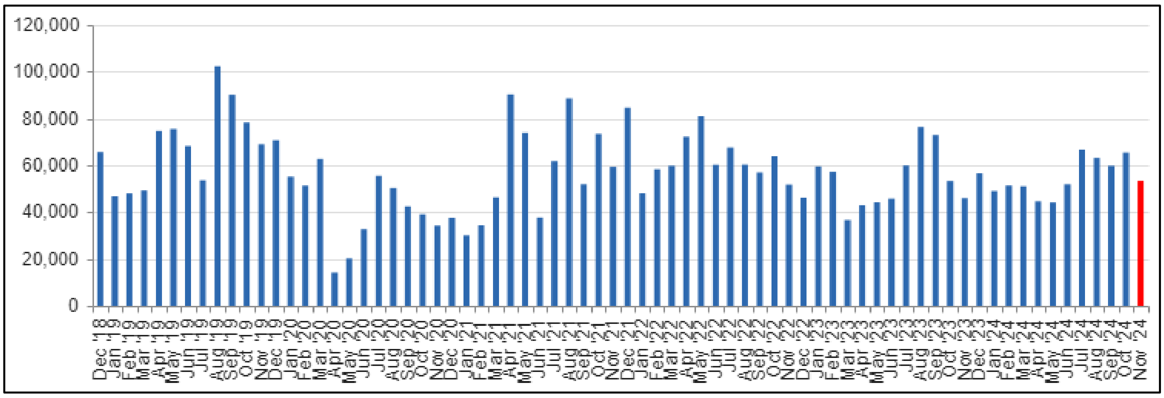


Source: MSCI

114. A section of Rivington Road, where it meets Marina Drive, was sampled to obtain information on how footfall levels have changed between December 2018 and November 2024.

115. As can be seen in the figure below pedestrian activity dropped in line with the heights of the pandemic-related restrictions on travel and movement between February 2020 – April 2021. Whilst figures have grown since, the trend of footfall shows fluctuating activity month on month. The figures show that the peak footfall month for Ellesmere Port was August 2019 (100,000+). Figures since mid-2022 show that footfall trends between 40,000 and 80,000 per month.

Figure 21: Monthly Footfall Activity, December 2018 – November 2024, Rivington Road



Source: MSCI

Accessibility

116. Ellesmere Port is well connected by road, with the A5032 running along the upper boundary, southwest to north of the centre boundary providing connections to the south, joining onto the A41, and to the north, joining onto the M53.

117. Ellesmere Port Train Station sits just beyond the northern edge of the centre boundary. The station provides good connections to destinations such as Birkenhead and Liverpool.

118. Ellesmere Port Town Centre has ample car parking space available, with the largest provision found in the Town Centre car park with 1,088 parking spaces including disabled bays. Additional car parking spaces include the Civic Centre car park (330 spaces) and Westminster car park (68 spaces).

119. Ellesmere Port Bus Interchange is located along Civic Way. This provides frequent buses to destinations such as Runcorn (2), Chester (1, x1), Liverpool (1, x1) and Neston (272).

120. Accessibility to the centre by bike is limited, with the notable absence of cycle lanes. However, cycle storage is present, with bike racks being strategically placed around the centre, including along Marina Drive and outside the Port Arcade Shopping Centre.

121. The pedestrian accessibility of the centre is relatively good, with the central core of Ellesmere Port shopping centre being pedestrianised along Rivington Road which provides easy and comfortable navigation for those on foot. Although the town centre is divided by the A5032 which may present minor barriers to movement, particularly during periods of heavy traffic, traffic light pedestrian crossings and pedestrian island crossings are present along the A5032.

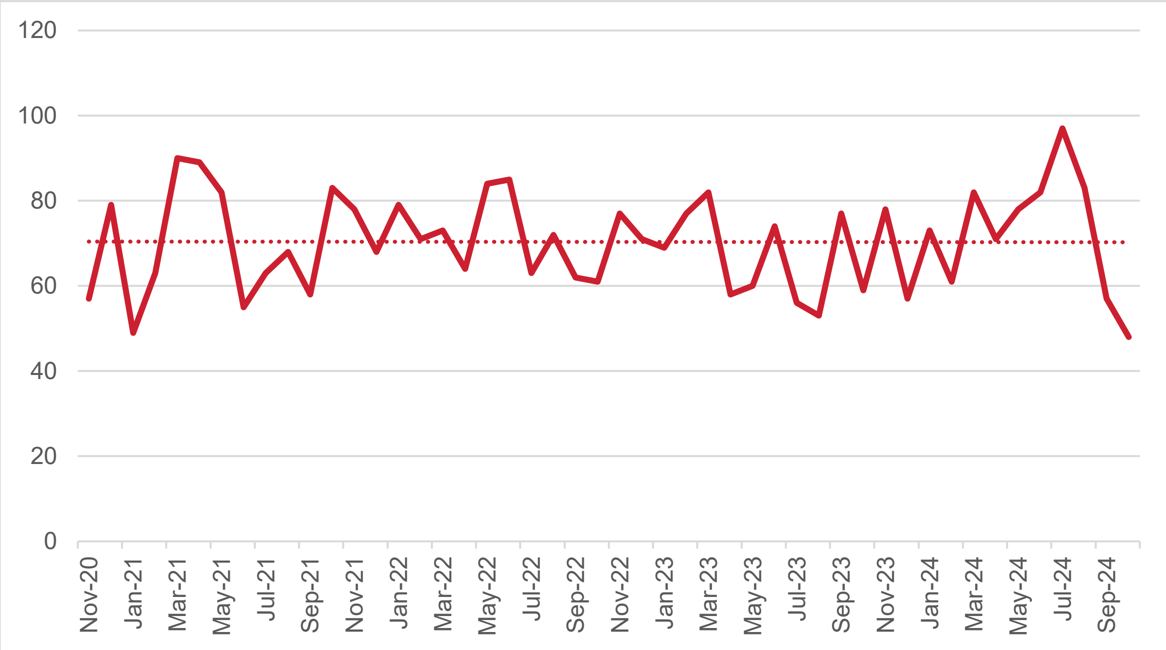
Crime and Safety

122. A central postcode (CH65 0AP) within Ellesmere Port was used to review total crime data within a ¼ mile radius between November 2020 and October 2024. The figure

below outlines the total crime rate month by month within this period, as well as a trendline to show the overall change in criminal activity over the four years.

123. As can be seen, whilst recorded crime levels have fluctuated over this period. When comparing 2020 to 2024 the overall trend demonstrates that crime activity has remained stable over the period. Over this period July 2024 represents the peak month for criminal activity (97 recorded crimes).

Figure 22: Ellesmere Port Recorded Crimes, November 2020 to October 2024

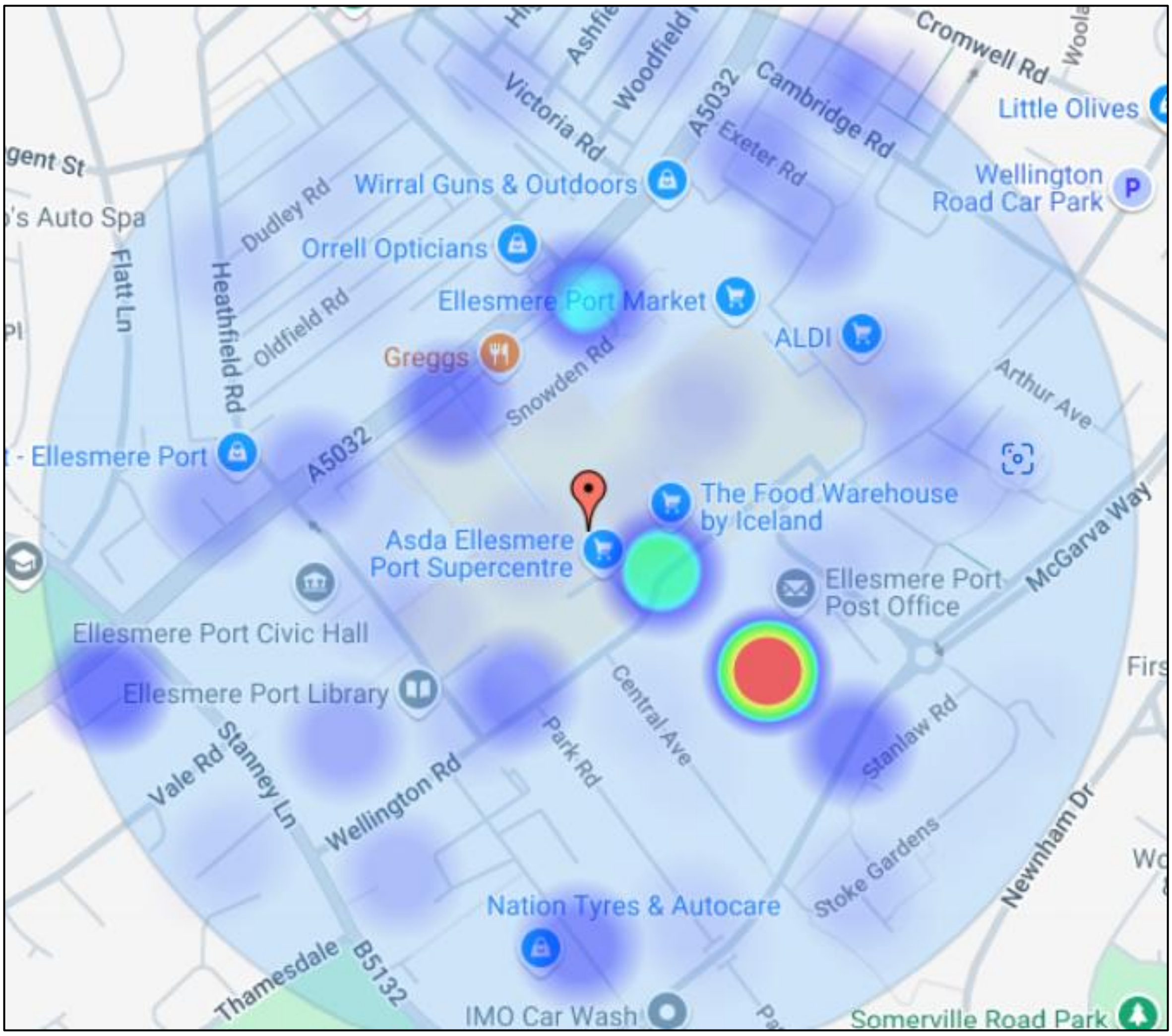


Source: UKCrimeStats

124. The figure below shows a heat map representing criminal activity within the same area and for the same period outlined previously. As can be seen, criminal activity is concentrated beyond Asda Ellesmere Port Supercentre, with two further pockets of concentrated criminal activity around The Food Warehouse by Iceland and The William Jessop Free House. The concentration of criminal activity around these three locations is consistent with top three type of crime recorded within the search area as detailed below.

125. The top three types of crimes recorded within this area during this period are anti-social behaviour (714 recorded incidences), public order offences (479 recorded incidences) and shoplifting (392 recorded incidences).

Figure 23: Ellesmere Port Crime Heat Map, November 2020 – October 2024



Source: UKCrimeStats

Environmental Quality

126. The environmental quality of Ellesmere Port Town Centre is mixed particularly between the Ports Arcades Shopping Centre and the northern section of the town centre along Whitby Road. The centre is generally of a functional character and there are some signs that investment is needed in terms of the fabric and maintenance of buildings.

127. Whilst there are several vacant units within the Port Arcades Shopping Centre, it provides a serviceable and pedestrian friendly environment.

128. However, the environmental quality of both Rivington Road and Marina Walk is severely harmed by absence of occupied outlets and the presence of large vacant outlets – which in turn makes the environment suitable for illegal activities. Likewise, the environmental quality of the northern section of Whitby Road is noticeably poor as a result of vacant outlets, outlets in a state of disrepair, and the relationship with and impact of the heavily trafficked Whitby Road.

129. Whilst areas of the centre are pedestrian friendly, the area of the centre that interrelates with Whitby Road is dominated by vehicle movement which impacts on the environmental quality of this part of the centre.

130. There is a noticeable absence of historic or architecturally special buildings within Ellesmere Port town centre, with the only listed buildings being the Grade II Queens Cinema and Ellesmere Port Railway Station located to the north of the centre.

131. Planting and greenery is limited within the centre, and there is limited access to green space. Whitby Road and Marina Drive are separated by a linear area of tree planting which does bring a softness to an otherwise hard landscape. Further efforts could be made to improve the vibrancy and greenery of the centre which would help make it a more pleasant environment.

132. With regards to street furniture, bins can be found across the centre. Provision of seating can be found in multiple locations allowing visitors to sit and rest. Bike racks are also present, allowing convenient storage for those who wish to cycle to and from the area.

133. Overall the environmental quality of Ellesmere Port is relatively low, and investment would be welcome to enhance its overall quality.

Evening and Night Time Economy

134. A strong evening and night time economy can often be a good indicator of a strong, vital, and viable centre. A vibrant evening and night time economy is underpinned by a quality leisure offer within a centre, and so a sample of predominantly leisure outlets within Ellesmere Port have been selected with their opening times and more importantly closing times recorded to get a sense of the provision of the evening offer.

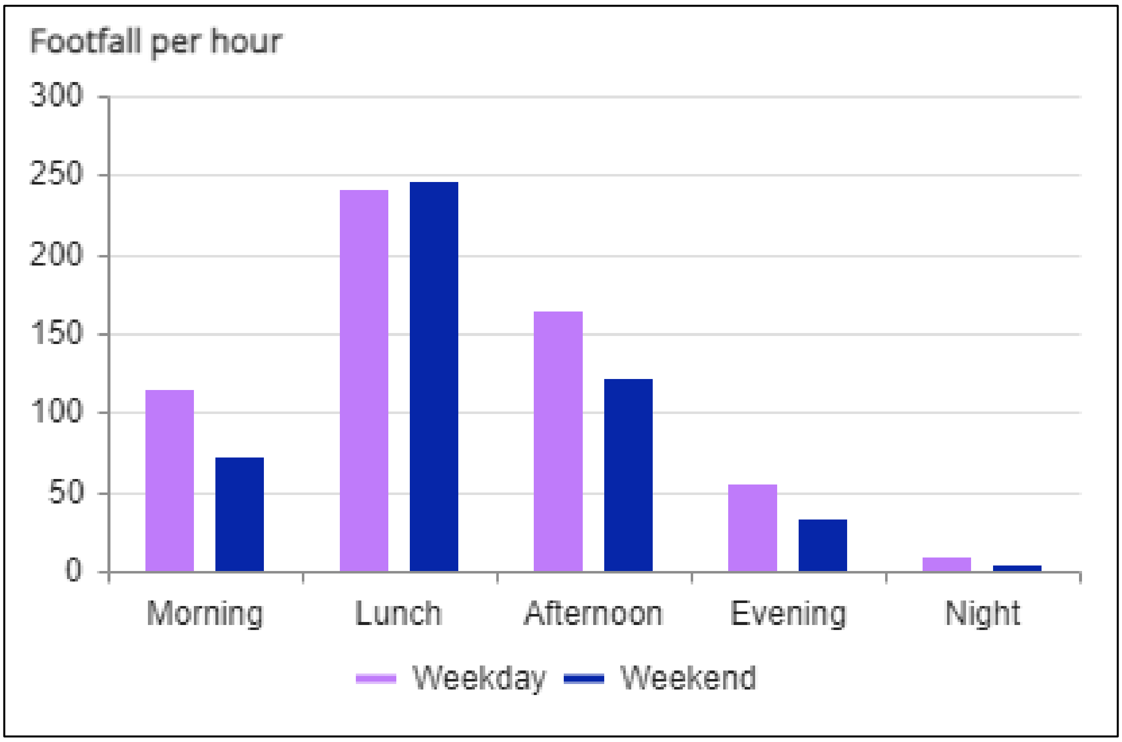
Table 4: Leisure Operator Sample

Retailer Name	Type	Open	Close
Club 3000 Bingo	Bingo Hall	11:15am	12am
Go Pho	Restaurant	11:30am	9pm - 10pm
The William Jessop	Pub	10am	11pm – 1am
Essence of Spice	Restaurant	1pm – 5pm	9:30pm – 11pm
Light of India	Restaurant	4pm – 5pm	9:30pm – 10:30pm

Source: LSH Research

135. The figure below shows how footfall levels differ across different parts of the day. As can be seen, footfall in an evening (5pm – 9pm) sharply drops as the day moves from afternoon to evening, this is as a direct consequence of the areas limited leisure offer. Ellesmere Port is unable to retain evening footfall and visitors on both weekdays and weekends.

Figure 24: Evening Footfall, Rivington Road (November 2024)



Source: MSCI

Conclusion

136. Overall, the Strengths, Weaknesses, Opportunities, Threats (SWOT) can be summarised as follows.

Strengths

- Healthy provision of convenience retail including the presence of Asda, Aldi and Farmfoods.
- Good connectivity via public transport and vehicle with ample parking provision.
- Indoor Market due to be enhanced offering community space, youth space, children's play area, enterprise area, improved central eating areas and market stalls – complemented by an improved Flea Market hosting more events with the aim of attracting higher footfall.
- An emerging events programme relating to the Civic Hall, the redeveloped Flea Market, and Theatre Porto (albeit the latter facility is located a short distance from the town centre at Whitby Park).

Weaknesses

- Overall poor environmental quality which detracts from the appeal of the centre.
- Significant shortfall in the provision of leisure outlets within the centre.
- A vacancy rate that significantly exceeds the national average and has resulted in vacant units detracting from the quality of place through lack of presence and dereliction.

- Severely limited evening and nighttime quality, with food & beverage dominated by fast food takeaways which may not generate footfall at the same rate as other uses due to their increased reliance on delivery services.
- Limited evening footfall.

Opportunities

- Redevelopment of the Civic Offices to unlock and deliver new low carbon homes within the centre that could generate a critical mass of residents.
- Use of Levelling Up Fund monies to provide a re-imagined Market and Flea Market with improvements for cultural events and extended market events.
- Introduction of a broader range of uses to tackle the level of vacancies, e.g. residential and healthcare, leisure, cultural events, crafts, and family activities. There is also an opportunity to support a more expansive evening and night time economy offer.
- Improvements to accessibility for sustainable and active modes of transport (cycling and walking).
- Investment into the public realm to make needed improvements to the environmental quality of the centre.

Threats

- Declining environmental quality continuing to detract from the attraction of the centre.
- Continued decline in the comparison retail offering of the centre.
- Continuing increases in the vacancy rate.
- The need to retain a critical mass of commercial operators in order to underpin Ellesmere Port's role and function to ensure it is an attractive proposition for local residents.

137. We therefore conclude that whilst Ellesmere Port is able to meet many of the straightforward day to day retail and service needs of its immediate catchment, the reduction of its comparison retail offer and an increasing vacancy rate indicates that the health of the centre has been in decline. It should be noted that the reduction in the centre's comparison goods function has likely been exacerbated by the centre's proximity to exceptionally strong out of centre retail provision at Cheshire Oaks, Coliseum Shopping Park, and the Marks & Spencer at Stanney Woods Avenue.

138. Future regeneration aspirations for the town to help underpin its position in the retail hierarchy include:

- improvements at the Civic Square and Civic Hall;
- Town Centre Masterplan to consider additional housing;
- consolidated retail core;
- improved public amenity/public realm;
- further dwell space;
- animation of the town centre; and
- an improved cultural offer and evening/night time economy initiatives.

4. Northwich Town Centre Health Check

Overview

139. Northwich is one of the largest defined centres within Cheshire West and Chester.

140. Northwich is situated to the east of the Authority area and sits in close proximity to the authority boundary with the Cheshire East authority area.

141. Northwich is a historic market town undergoing transformative change as a result of the completion of the Barons Quay development, and the intent to demolish the old market and retail units surrounding Weaver Square and replace with a mixed-use development with public spaces and supporting infrastructure including modern and affordable sustainable town centre living.

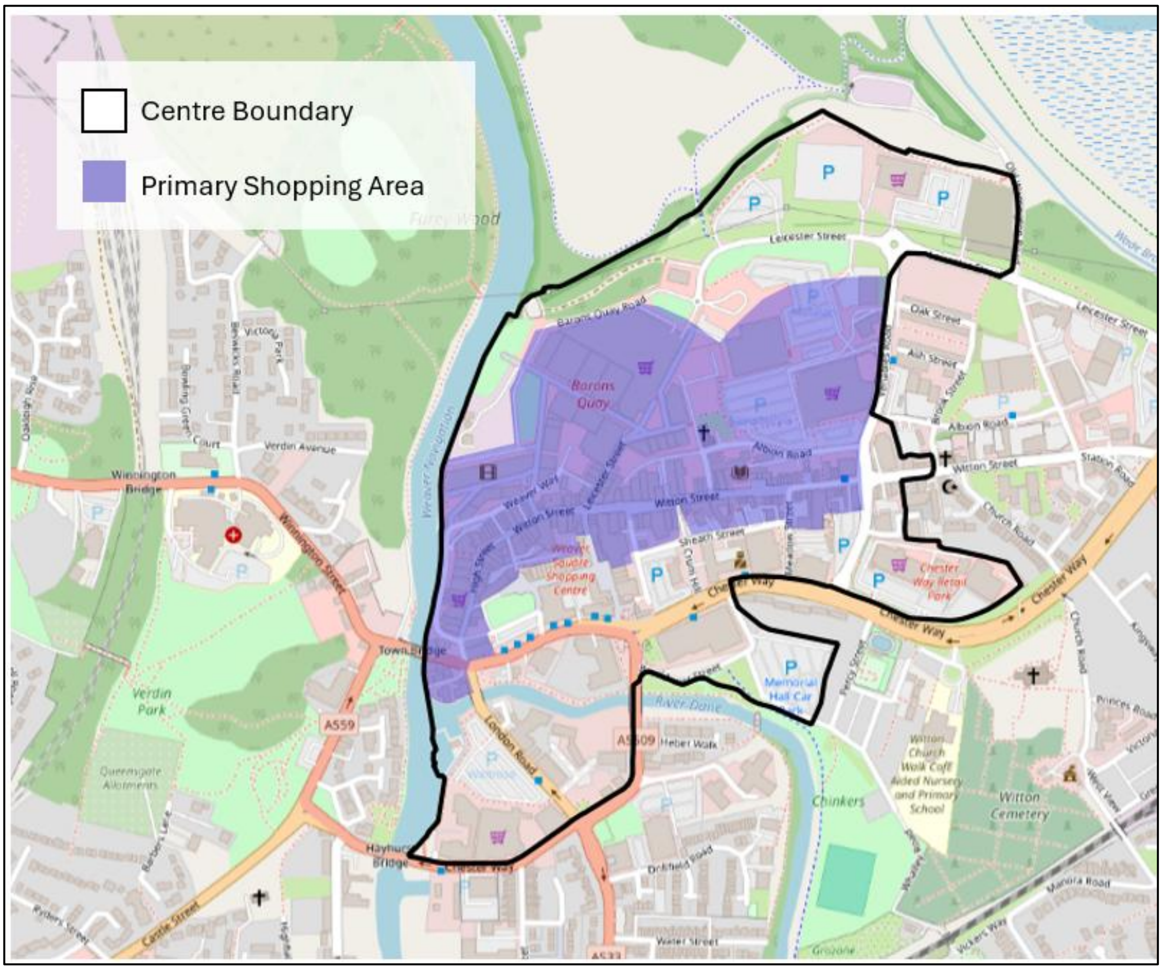
142. The substantial investment in Northwich seeks to revitalise the town centre and enhance its role within the retail hierarchy.

143. The centre covers a large geographical area. Witton Street and High Street form the linear artery of the centre and are lined either side with retail and leisure outlets. The Barons Quay development sits to the north of Witton Street and High Street. Weavers Square is situated to the south, and is now largely vacant, ready for redevelopment. In addition to the traditional town centre format, the Northwich centre also includes satellite ancillary sites in the form of standalone developments of Aldi, Halfords, Matalan, Sainsburys, and Waitrose.

144. The current retail and leisure composition of Northwich is reflective of the regenerative transition currently taking place and the role it plays in the centre hierarchy and retail and leisure landscape of Cheshire West and Chester.

145. Northwich library on Witton Street is currently undergoing extensive investment and refurbishment. Once this building re-opens after extensive capital works project is complete in 2026, it will serve as a community hub, providing skills and employment support.

Figure 25: Northwich Town Centre Boundary and Primary Shopping Area



Diversity of Uses

146. Experian Goad data from November 2023 has been used to assess Northwich's mix of uses and has been updated based on an LSH site visit in January 2025 to provide an updated view of the retail and leisure mix.

147. The table below shows that Northwich has a total of 291 units and an overall quantum of 83,610 sqm in floorspace. In the previous August 2015 health check assessment for Northwich, 260 commercial units comprising of 59,219 sqm of floorspace were identified. At the time of preparing the previous health check, the Barons Quay redevelopment scheme was being pursued but had not been delivered.

148. The current composition of the centre now reflects the associated additional retail and leisure outlets (29 units) and floorspace generated as a result of the completion of Barons Quay.

Figure 26: Outlets and Floorspace

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% Total Floorspace	
		Northwich	UK Average		Northwich	UK Average
Comparison Retail	65	22.3%	26.4%	20980	25.1%	29.4%
Convenience Retail	27	9.3%	9.3%	21170	25.3%	15.6%
Retail Services	38	13.1%	15.9%	3620	4.3%	7.3%
Leisure Services	53	18.2%	25.8%	16540	19.8%	26.7%
Financial & Business Services	37	12.7%	8.3%	7750	9.3%	6.3%
Vacant	71	24.4%	14.1%	13550	16.2%	14.2%
Total	**291**	**100%**	**100%**	**83610**	**100%**	**100%**

Source: Experian Goad and LSH Site Visits (January 2025)

149. Despite the completion of Barons Quay in 2016, comparison retail is underrepresented in Northwich in terms of both the number of outlets (22.3%) and occupied floorspace (25.1%) when compared against the UK averages (26.4% and 29.4%, respectively). Likewise the current number of comparison retail outlets is 20 units less than the 84 identified in the previous health check assessment for Northwich. The quantum of comparison retail floorspace is however comparable (20,980 sqm vs 20,548 sqm). The comparison retail offer within Northwich includes national multiples such as H&M, Matalan, River Island, and Sports Direct. It is expected that larger centres have a propensity to support a greater proportion of comparison goods floorspace, and Northwich's current performance should be viewed in this context.

150. Contrary to comparison provision, the representation of convenience retail outlets is consistent with the UK average (9.3%). The quantum of occupied convenience retail floorspace (21,170 sqm) sits at 25.3%, which does significantly exceed the UK average of 15.6%. The current composition also exceeds the convenience retail offer identified within the previous health check assessment of 24 outlets, and 15,091 sqm (25.5%). It can be concluded that the current high proportion of convenience retail floorspace is as a direct result of the town centre boundary now encompassing an Aldi (1,890 sqm), Asda (4,950 sqm) (delivered as an anchor store to the Barons Quay development), Lidl (1,760 sqm), Sainsbury's (4,790 sqm), and Waitrose (2,730 sqm) which collectively account for 76% of convenience (16,120 sqm). Of the 'big-box' convenience outlets, Asda and Sainsburys are located within the defined primary shopping area. The provision of convenience retail demonstrates that it has a significant role to plays in supporting trips to the centre.

151. There is a higher provision of financial & business services both in terms of outlets and floorspace in Northwich when compared to the UK average, with a total of 37 units covering 7,750 sqm of floorspace. The provision of financial & business services is also higher than that identified in the previous health check assessment (where 32 units and 4,948 sqm of floorspace were recorded as being in this use).

152. Both retail services and leisure services are underrepresented within Northwich when compared to the national average position. A total of 91 outlets equates to 31.3% of all outlets (which compares to the UK average of 41.7%) and 20,160 sqm

of floorspace represents 24.1% of the total stock (which compares to the UK average of 34%).

153. The provision of retail service outlets exceeds that identified in the previous health check (34), which as a percentage of the total number of outlets is consistent with the current analysis (13.1%). The proportion of the total floorspace occupied by retail service operators is also consistent with the findings of the previous health check (4.0%). The retail service offer is dominated by health & beauty operators (26 outlets). Other services include opticians (such as Boots and Specsavers), travel agents (such as Hays Travel and Barrhead Travel), and the Post Office.

154. The quantum of leisure service outlets (53) is significantly higher than that identified by the previous health check assessment (34). Likewise the total floorspace occupied by leisure service operators is 16,520 sqm (equating to 19.8% of the stock of floorspace) which is also substantially greater than the figure of 9,816 sqm recorded by the previous health check.

155. Beyond food & beverage provision (which is covered below), Northwich has a range of sports and leisure facilities (such as Puddle Ducks and Snap Fitness 24/7), several betting offices (such as Coral and William Hill), and a five-screen Odeon Cinema which is located within the Barons Quay development.

Figure 27: Food & Beverage Outlets and Floorspace

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% Total Floorspace	
		Northwich	UK Average		Northwich	UK Average
Bars and Wine Bars	7	2.4%	2.3%	1700	2.0%	2.4%
Cafes	13	4.5%	5.1%	2000	2.4%	2.9%
Fast Food & Takeaway	8	2.7%	6.1%	940	1.1%	3.1%
Public Houses	6	2.1%	2.6%	1790	2.1%	3.4%
Restaurants	4	1.4%	5.1%	1190	1.4%	4.3%
Total	38	13.1%	21.2%	7620	9.1%	16.1%

Source: Experian Goad and LSH Site Visits (January 2025)

156. The composition of food & beverage outlets and floorspace within Northwich is below the UK average as a whole. Food & beverage operators make up 13.1% of all units in the centre, and 9.1% of total floorspace.

157. The composition of food and beverage outlets is spread out across the centre. Bombay Quay and the Salt House NW are located to the south of the centre at Hayhurst Quay. There is a good representation of operators along Witton Street. Five operators are also located within the Barons Quay development.

158. Notwithstanding the underrepresentation of food and beverage outlets and floorspace, there are a number of national multiples within the centre including Costa Coffee, JD Wetherspoon, and Starbucks.

Vacancies

159. There are a total of 71 vacant outlets in Northwich which represents 24.4% of the overall outlets (higher than the UK average of 14.1%). In total, 16.2% of the

floorspace (13,550 sqm) in Northwich is vacant. This is higher than the 20.0% vacancy rate identified in the previous health check assessment.

160. Whilst the vacancy rate appears high, it is necessary to highlight that 33 (46%) of the vacant units are located within the Weaver Square area of the centre, an area that the Council have identified to be demolished as part of its Development Framework vision that will see delivery of new modern and affordable sustainable town centre living, as part of a mixed-use development with public spaces and supporting infrastructure.

161. Notwithstanding that, the vacancy rate within the Barons Quay development is noticeable. Of the 29 units that make up Barons Quay, nine (31%) are currently sat vacant. It is understood that most of these units are currently under offer, but the take up of space since its completion in 2016 has been slow.

162. However, LSH is aware that the Council have committed to opening a new modern market in Barons Quay in Units 12/13. This will see the Northwich Market move from Weaver Square in Spring 2026. This new market will seek to improve the market experience and complement the existing retailers, leisure and food and drink options already in Barons Quay. The move of the market will also facilitate the Council's comprehensive redevelopment vision of the Weaver Square area.

Markets

163. As noted in the NPPF, markets play an important role in supporting the vitality and viability of centres and local communities and there is policy support for the retention and enhancement of existing markets and creation of new ones.

164. Northwich's indoor market is located on Apple Market Street within Weaver Square. The market is open Tuesday, Thursday, Friday, and Saturday, 9am to 4pm. The market has capacity for 55 stalls, albeit only a third of the units are occupied with a total of 7 traders. A variety of goods, services and the expertise of independent traders are on offer, including healthy living homeware, cards, clothing, computer repairs, pet food, mobile phones, jewellery, and gifts. A café is also available at the market.

165. As highlighted above the Council have committed to opening a new modern market in Barons Quay in Units 12/13 which will see the Northwich Market move from Weaver Square in Spring 2026.

166. An outdoor artisan market is held within Northwich on the 2nd Saturday every month between 10am – 4pm. The market takes place throughout the year and consists of over 100 traders lining Witton Street and the main shopping avenue in Barons Quay.

Retailer Requirements

167. Demand from retailers and leisure operators for representation in a centre is an important indicator of a centre's overall health and viability.

168. In September 2024 SNAP Fitness had a requirement for between 560 – 1,200 sqm of floorspace within Northwich town centre. This requirement has since been

satisfied and SNAP Fitness now occupy 1,800 sqm of floorspace within the Barons Quay development,

169. Before falling into administration, Wilko's had a requirement for between 1,700 sqm and 3,250 sqm of floorspace.

170. The latest published market demand report is set out in the table below:

Table 5: Retailer Requirements, Northwich

Recorded Date	Operator	Sector	Min Sqm	Max Sqm
Sep 24	Formula One Autocentres	Retail Service	420	650
Sep 24	M&S Food	Convenience Retail	560	2,300
Sep 24	COOK	Convenience Retail	85	130
Jun 24	The Range (see further detail below)	Comparison Retail	1,900	7,400
Apr 24	PDSA	Comparison Retail	90	185
		Total	**5,315**	**15,115**

Source: The Requirement List

171. As of January 2025, a review of published operator requirements identified seven recorded requirements from retail and leisure operators since April 2024, seeking a combined maximum floorspace of up to 15,115 sqm.

172. It should be noted that these are not necessarily operators seeking representation within the centre itself but potentially out-of-centre locations and retail parks - The Range being an example. The Council have been aware of their interest but indicate that a suitable unit could not be found within the town centre.

173. It is also possible that these operators are not looking for opportunities in Northwich specifically, rather they are looking for opportunities in areas similar to and including Northwich.

174. Independent/ smaller operators do not tend to document their desire for retail space in the same way as the larger national multiples and fast-growing organisations, and so gauging the demand for retail space from these businesses is harder.

Commercial Rents and Yields

175. Over recent years the UK Retail sector has experienced a significant number of corporate failures, which has often resulted in Creditor Voluntary Arrangements (CVAs) or pre-pack administrations. Retailers and restaurateurs have frequently used these processes to effectively impose lower rentals, turnover rents, and flexible leases onto landlords. The upshot of this is rental levels can vary widely, even for identical shops adjacent to each other.

176. In light of the above and current vacancy rates, solvent retailers have adopted aggressive positions at lease renewal seeking to drive rents down and reduce lease commitments, regardless of comparable evidence.

177. The impact of the pandemic has exaggerated this trend, and flexible leases and turnover linked rents are becoming more common place. In many cases landlords have adopted the policy that keeping a shop occupied, and thereby mitigating void costs is preferable to maintaining a rental tone within a retail location.

178. A broad estimate of prime rental tone within Northwich, when analysing Witton Street / Leicester Street and Barons Quay Shopping Centre would indicate a rental level in the region of £35/sqft – £45/sqft. Information that the Council has from recent rent reviews/ new lettings in the town however show that rents across Northwich town centre are somewhat lower than this (£30/sqft - £40/sqft). The Council also highlight that incentives are often required to secure tenants.

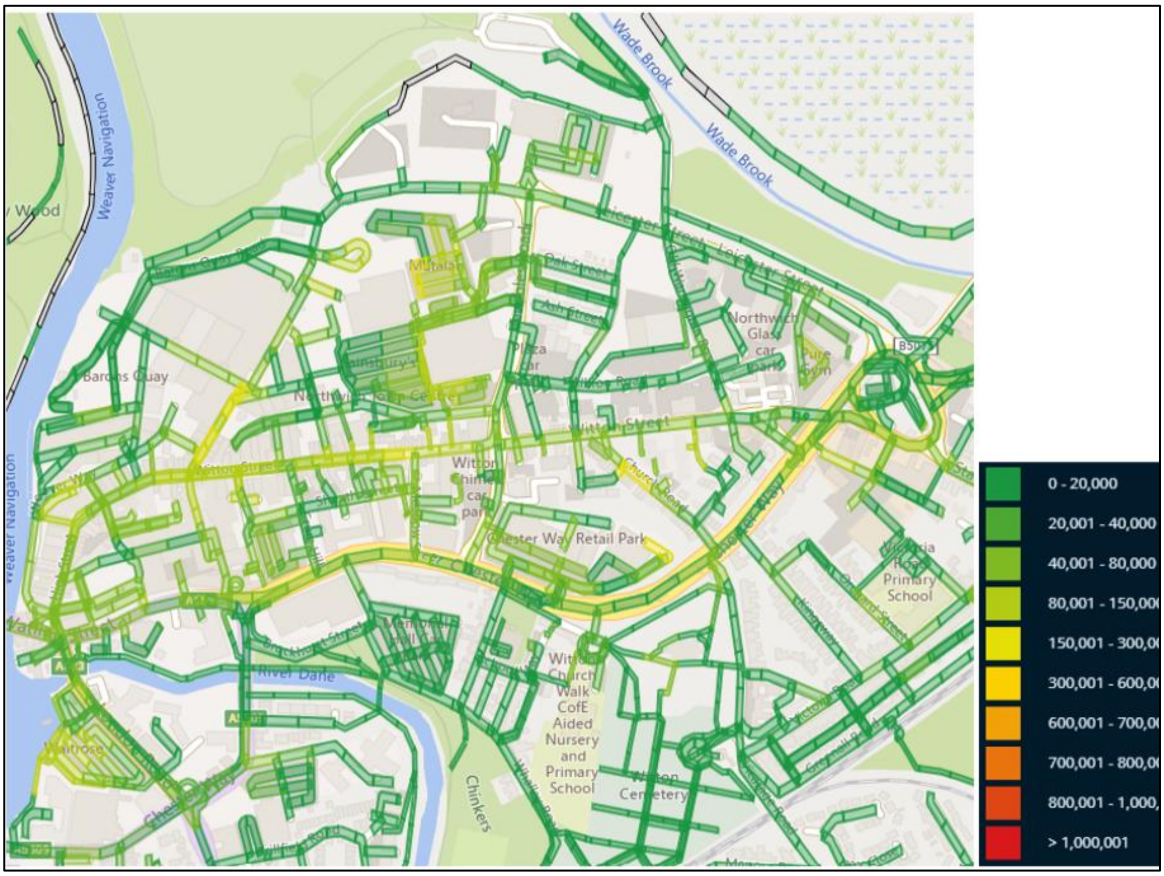
179. In terms of investment yields, retail as an asset class has seen a significant fall in value over the past decade. Transactional volumes in 2023 were subdued with high interest rates and global political uncertainties impacting on investor sentiment. Clearly, there are many factors that impact on town centre retail yields including lease length, tenant covenant and basis of rent review but in the broadest terms we would comment as follows:

- Prime high street yields – 6.75%
- Good secondary high street yields – 9%
- Secondary high street yields – 12%.

Pedestrian Flows

180. The figure below illustrates the pedestrian flows for Northwich in the form of a heat map showing total pedestrian movements for November 2024. As can be seen, there is a concentration of footfall activity on Chester Way to the south of Chester Way Retail Park, along Witton Way, along Leicester Street towards Barons Quay, and around Matalan and Sainsburys.

Figure 28: Northwich Footfall Heat Map, November 2024



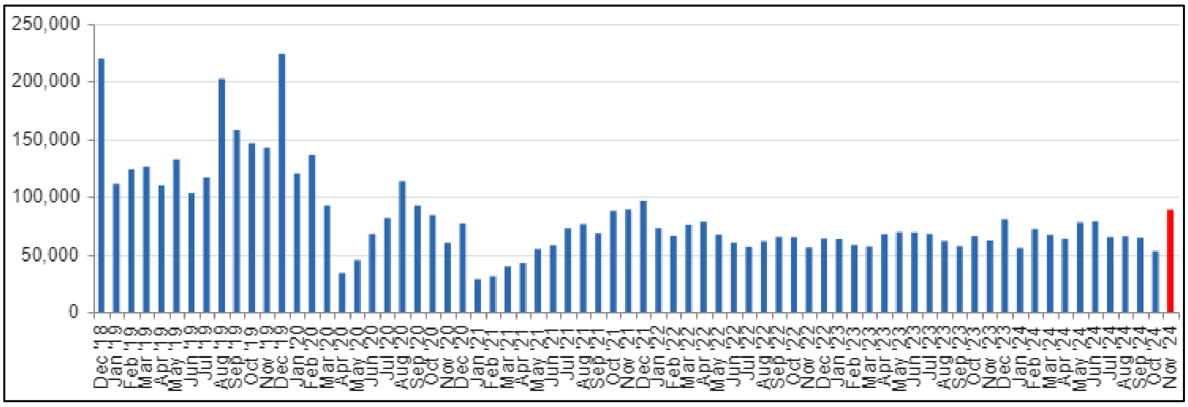
Source: MCSI

181. A busy section of Witton Street was sampled to obtain information on how footfall levels have changed between December 2018 and November 2024.

182. As can be seen in the figure below, footfall levels pedestrian activity dropped dramatically in line with the heights of the pandemic-related restrictions on travel and movement between February 2020 – April 2021. The data evidences that footfall within the centre has not recovered since the pandemic, and footfall movements are significantly less than they were before the pandemic.

183. During the 12-month period from December 2018 – December 2019 (pre-pandemic) to the 12-month period footfall count ranged from 100,000 up to 225,000. Between December 2023 and November 2024, the average monthly footfall count was between 50,000 and 75,000.

Figure 29: Monthly Footfall Activity, December 2018 – November 2024, Witton Street



Source: MSCI

Accessibility

184. Northwich is well connected by road, with the A559 running east to west across the middle of the centre. This provides connections towards Lostock Gralam, eventually merging onto the A556. Additionally, the A533 runs south of the centre, merging onto the A54 towards Middlewich to the south and Widnes to the north.

185. Northwich Train Station is beyond the centre boundary, approximately 0.6 kilometres east from the defined centre boundary. The station provides connections to destinations such as Chester and Manchester.

186. Northwich Town Centre has ample parking provision, with the largest provision found at Barons Quay car park. 900 spaces are available, including disabled bays and electric vehicle charging provision. Other notable parking locations include Sainsbury's car park (356 spaces) and Memorial Hall car park (180 spaces).

187. Northwich Bus Interchange is located southwest within the centre boundary along the A533. These buses provide regular connections to destinations such as Frodsham (48,49), Chester (82), Warrington (9A, CAT9) and Knutsford (89) – albeit it is recognised that bus provision in the evenings is limited.

188. The centre has limited cycle provision, notably with the absence of cycle lanes and limited cycle storage spaces (existing cycle parking can be found in Barons Quay and outside the library).

189. The pedestrian accessibility of the centre is good and legible, with pedestrianisation of roads in the town centre such as parts of Witton Street in the centre and High Street. Pavements are wide and ample seating is provided to support those on foot, creating a safe pedestrian environment.

190. It is noted that the Council have been awarded Active Travel England funding to deliver an active travel route from Northwich town centre (Venables Street/ Witton Street) to Northwich railway station. The scheme is to get underway in summer/ autumn 2025 and seeks to improve pedestrian crossing points at side roads, reduce speed limits to make on-road cycling safer, provide a new signalised crossing for

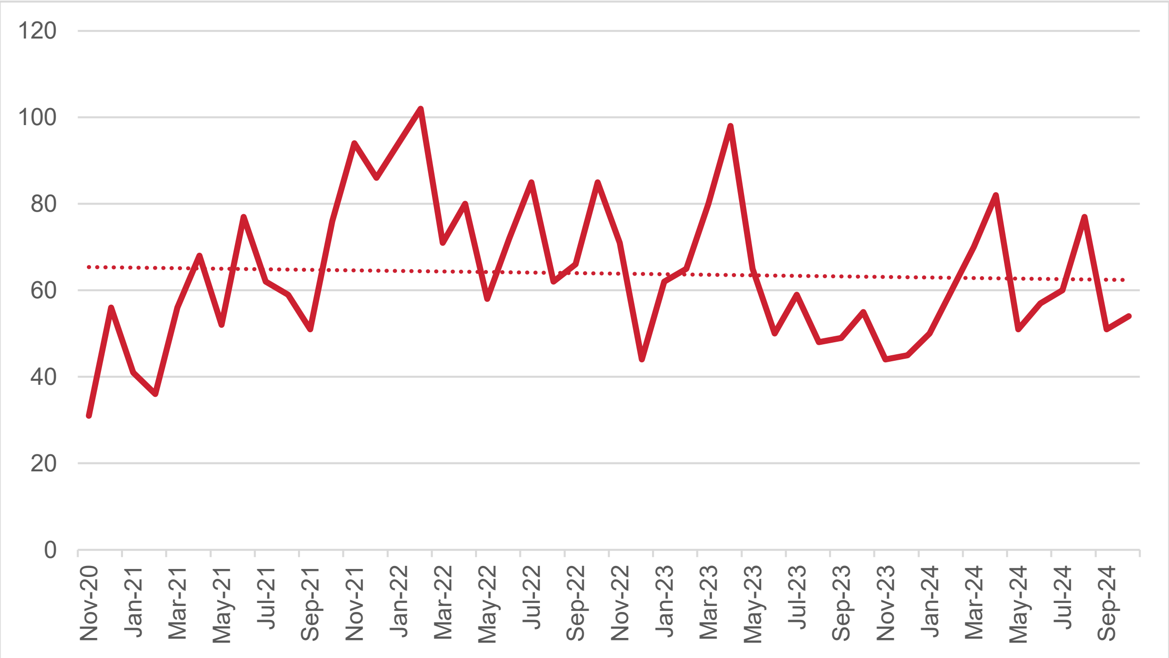
pedestrians and cyclists over Chester Way, improve public realm and junction works at Venables Way as well as provide new cycle parking. The implementation of this scheme will positively impact the accessibility of the town centre.

Crime and Safety

191. A central postcode (CW9 5DW) within Northwich was used to review total crime data within a ¼ mile radius between November 2020 and October 2024. The figure below outlines the total crime rate month by month within this period, as well as a trendline to show the overall change in criminal activity over the four years.

192. As can be seen, recorded crime levels have been slowly trending downwards decreased during this period, albeit there have been several spikes in criminal activity. Over this period February 2022 represents the peak month for criminal activity (102 recorded crimes).

Figure 30: Northwich Recorded Crimes, November 2020 – October 2024



Source: UKCrimeStats

193. The figure below shows a heat map representing criminal activity within the same area and for the same period outlined previously. As can be seen, pockets of criminal activity are spread across the centre, with the largest concentration around lower High Street. Thereafter there are concentrations of activity around the Barons Quay Car Park, Sainsburys, Sheath Street and McDonalds.

194. The top three types of crimes recorded within this area during this period are anti-social behaviour (758 recorded incidences), shoplifting (551 recorded incidences), and public order offences (408 recorded incidences).

Figure 31: Northwich Crime Heat Map, November 2020 – October 2024

Source: UKCrimeStats

Environmental Quality

195. Northwich town centre comprises of modern and historic elements contributing to its environmental quality which combine to create a pleasant environmental feel. The linear form of Witton Street and High Street as well as Weaver Square are reflective of a sites traditional market town status. The Barons Quay development provides a modern retail and leisure provision that differs from the town's traditional format.

196. The relationship between the town and the confluence of the River Dane and River Weaver creates a distinct sense of place within the town centre that enhances the town environmental quality.

197. The Northwich Conservation Area covers a significant part of the town and its immediate outskirts, with two of the conservation areas identified character zones, the Town Centre and River Banks, covering a large portion of the defined centre. The Barons Quay development is not located within the Northwich Conservation Area. Five Grade II listed buildings are located within the Conservation Area and

Town Centre, these are: R.A.O.B Hall, Brunner Public Library, the Penny Black JD Wetherspoons Public House (former Northwich Post Office), Plaza Bingo Club, and Church of St Wilfred.

198. Collectively these characteristics combine to create a pleasant environment that enhances the environmental quality and visual appearance of the town centre.

199. The appearance of the town centre benefits from planting, and greenery, including the grass meadow in Barons Quay and the Applemarket Place temporary event space, as well as street furniture, cycle parking and bin provision.

200. A large proportion of Northwich Town Centre is also pedestrianised / pedestrian friendly which significantly enhances the environmental quality of place.

201. Whilst the vacant and derelict nature of Weaver Square currently detracts from quality and feel of the town centre, it is recognised that this is temporary, and that the environmental quality will be enhanced should the mixed-use development including public space be brought forward.

202. On the whole Northwich is a pleasant town centre that provides an aesthetically pleasing environment which comprises of historical and modern characteristics.

Evening and Night Time Economy

203. A strong evening and night time economy can often be a good indicator of a strong, vital, and viable centre. A vibrant evening and night time economy is underpinned by a quality leisure offer within a centre, and so a sample of predominantly leisure outlets within Northwich have been selected with their opening times and more importantly closing times recorded to get a sense of the provision of the evening offer.

Table 6: Leisure Operator Sample

Retailer Name	Type	Open	Close
The Salthouse NW	Pub	3pm – 5pm	8pm – 11pm
The Bullring NW	Pub	3pm	11pm
The Bird & Hat	Pub	1pm – 4pm	8pm – 11pm
Baron’s Northwich	Pub	12pm – 4pm	10pm – 12am
The Salty Dog	Pub	12pm	10pm – 12am
The Swinging Witch	Pub	11am	11pm – 2am
Temple Bar Northwich	Bar	11am	11pm
The Dockyard Barons Quay	Bar	12pm – 5pm	10:30pm – 12am
The Penny Black – JD Wetherspoon	Pub	8am	12am – 1am
The Witton Chimes	Pub	11am	10pm

Retailer Name	Type	Open	Close
The Quayside	Pub	9am – 12pm	12am – 3am
Bombay Quay	Restaurant	1pm – 5pm	11pm
Wildwood Restaurants	Restaurant	11pm	8:30pm – 10pm
Northwich Tandoori	Restaurant	5pm	10:30pm – 11pm
Odeon Barons Quay	Cinema	Morning	Late

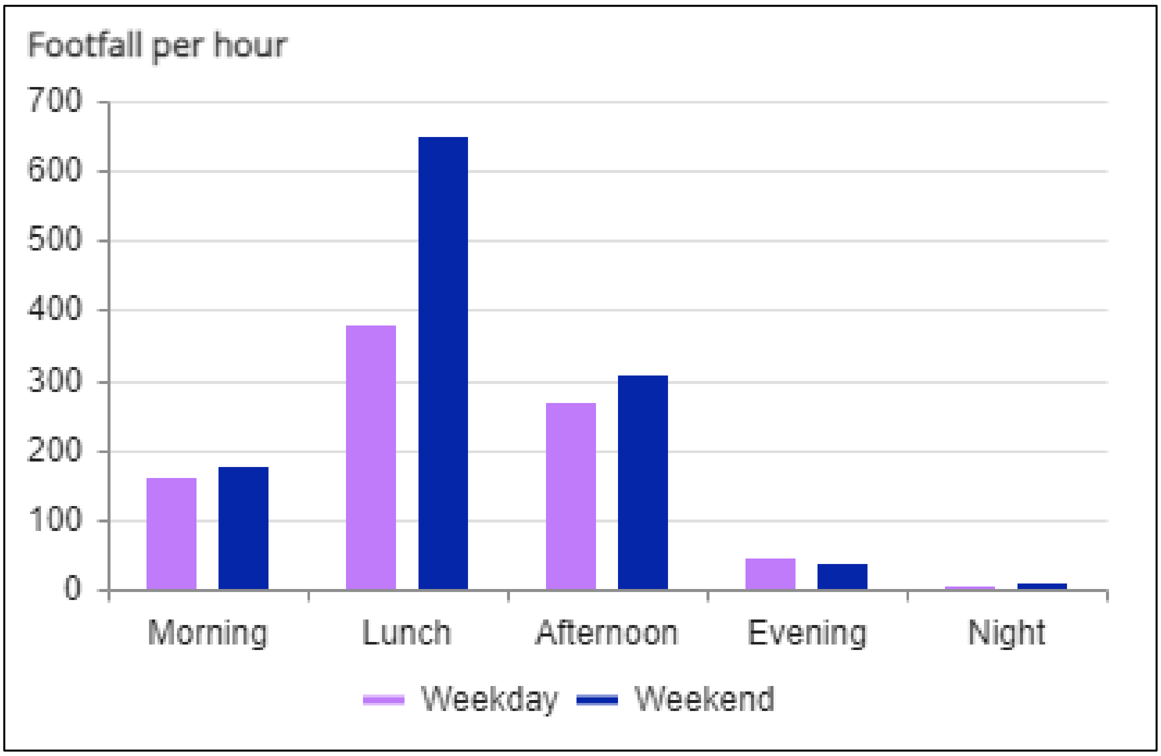
Source: LSH Research

204. Odeon Barons Quay cinema opened in 2016 to the western edge of the centre by the River Weaver and has a total of 5 screens. The Plaza is located along Witton Road, to the eastern edge of the centre. With a capacity of 960, it hosts live music events and has seen several venue upgrades carried out since 2021. Memorial Court features an entertainment space, with the ability to host 500 people for comedy nights, live music, conventions and more.

205. In addition to these establishments and venues, Northwich town centre hosts regular free events including Pina Colada Festival, NOW Northwich (International Dance & Street Arts Festival), The River Festival and The Christmas Extravaganza which enhance the centre's attraction as a destination and help to drive footfall throughout the day and evening.

206. The figure below shows how footfall levels differ across different parts of the day. As can be seen, footfall in an evening (5pm – 9pm) sharply drops as the day moves from afternoon to evening and the into nighttime, despite Northwich having a varied leisure offer. The absence of footfall in the evening may be as a result of the provision of leisure being below the UK average. Likewise, the food and beverage offer of Northwich includes a large proportion of cafés which operate through the day and do not provide an evening or night time offer. Despite being one of the larger centres within Chester West and Chester, Northwich is unable to retain evening footfall and visitors on both weekdays and weekends.

Figure 32: Evening Footfall (November 2024)



Source: MSCI

Conclusion

207. Overall, the Strengths, Weaknesses, Opportunities, Threats (SWOT) can be summarised as follows.

Strengths

- Strong convenience retail offer that includes Aldi, Asda, Lidl, Sainsburys, and Waitrose.
- Large proportion of the centre is pedestrianised/pedestrian friendly.
- Strong car parking provision (some of this will be lost following the proposed redevelopment of Weaver Square Shopping Centre).
- Representation of comparison and convenience national multiples.
- Above average provision of financial & business services.
- Major events town with regular free events including Pina Colada festival, NOW Northwich, The River Festival, The Christmas Extravaganza and many more.

Weaknesses

- Large vacant floorplates within the Barons Quay development that have remained unoccupied since its completion.
- Below average provision of comparison and retail outlets.
- An outdated market with high levels of vacancies.
- High vacancy rate (units and floorspace), albeit this is likely temporary given the redevelopment planned for Weaver Square.

- Weak leisure offer that results in an identified significant decline in footfall in the evening on both weekdays and weekends.
- Footfall hasn't recovered to pre-pandemic levels.

Opportunities

- New uses brought in to address vacancies (education, residential, office, healthcare etc.).
- Opening of a new modern indoor market into Barons Quay should help to diversify the retail and leisure offer within the development, which in turn should enhance footfall.
- Reimagining and re-opening of the Grade II listed library on Witton Street will help to drive footfall along Witton Street. The addition of classroom space and delivery of skills and employment support will diversify the offer and hopefully bring new customers to the heart of the town centre.
- Some encouraging retailer requirements for representation within Northwich.
- Proposed redevelopment of Weaver Square to deliver residential in the heart of the town centre.

Threats

- Redevelopment of Weaver Square not being delivered and the vacancy rate remaining high.
- The vacancy level and associated lack of activity negatively impacting on operators' perceptions and willingness to invest.

208. We therefore conclude that whilst Northwich is an attractive town centre environment, the regenerative ambition to revitalise the town centre and enhance its role within the retail hierarchy is yet to be fully realised. There has been a sustained period of vacancies within the Barons Quay development, which exemplifies the challenges that Northwich faces. However, we understand that some of the vacant units are under offer; completion of these deals will help diversify the town centre offer and drive additional footfall within the centre.

209. Notwithstanding this, the regenerative ambition for Northwich is yet to be fully realised, and the comprehensive redevelopment of Weaver Square provides an opportunity to introduce a greater mix of uses that will help to increase footfall and enhance the prosperity and vibrancy of the centre. The new market at Barons Quay and the re-opening of the library on Witton Street as a community library and skills and employment hub will also help to underpin the centre.

5. Winsford Town Centre Health Check

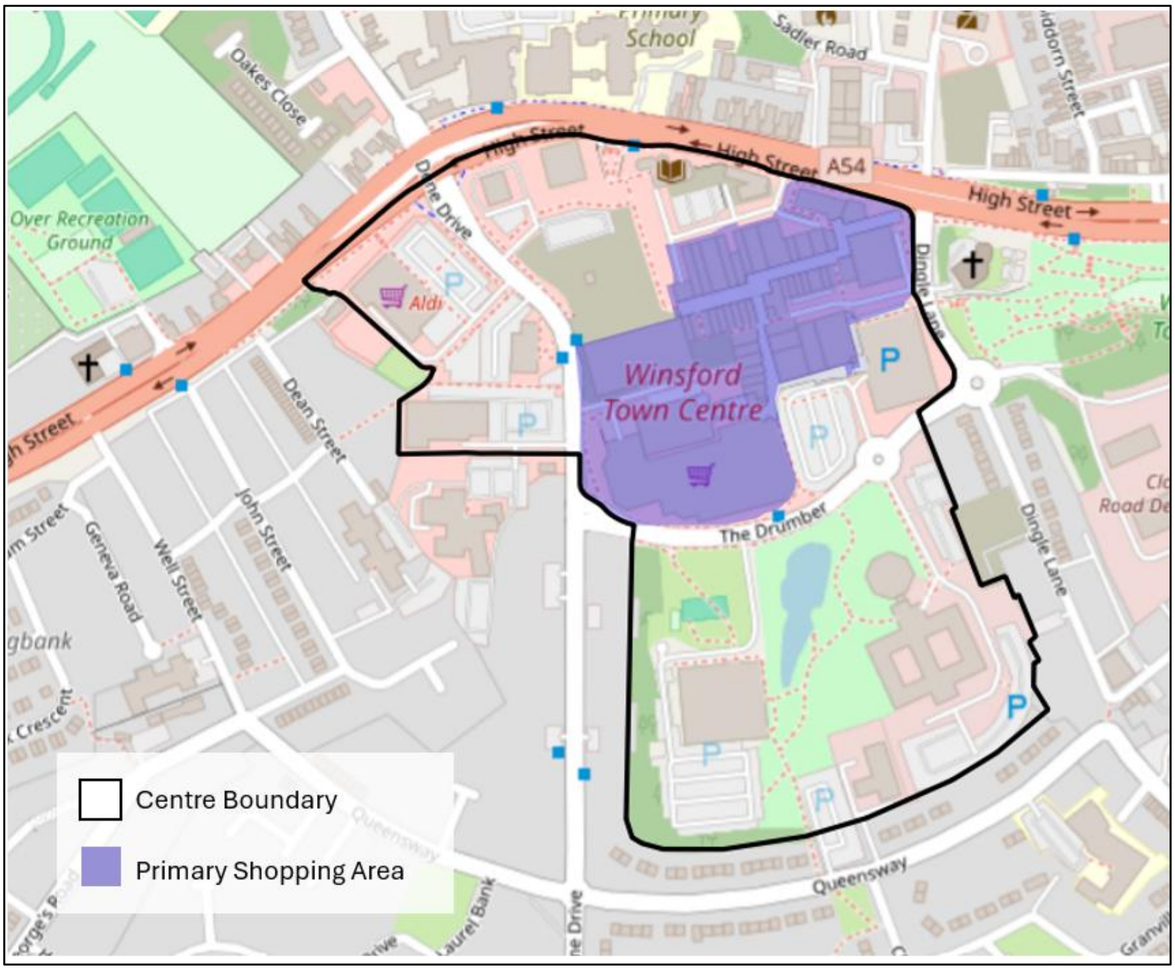
Overview

210. Winsford is one of the smaller centres within Cheshire West and Chester and is the most southern centre with the authority area. Further retail and leisure provision in Winsford is available nearby in the form of a Morrisons Supermarket and Wharton Retail Park situated approximately 1 kilometre to the north west.

211. The A54 wraps around the north of the centre and assists with its connectivity to the rest of the town. Residential development wraps around the centre to the east, south and west.

212. The centre is dissected by Dene Road which runs centrally from north to south.

Figure 33: Winsford Town Centre Boundary and Primary Shopping Area



213. The centre is currently undergoing a significant transformation which represents its most significant investment since the 1960s. Planning permission (LPA Ref: 21/05058/FUL) for the initial phase of the comprehensive regeneration of the centre was secured in April 2022.

214. The comprehensive redevelopment proposal is designed to unlock economic opportunities for existing and new businesses and is funded by the Council and through the Government's Future High Street Fund.

215. Fundamentally the regenerative activity will alter the composition of the centre with works involving the demolition of buildings no longer fit for purpose, and the erection of new retail and leisure outlets, car parking provision and new public open spaces.

216. The quantum of development approved pursuant to LPA Ref: 21/05058/FUL is as follows:

Full Planning Permission

- Retail Unit 1& 2: 2,473 sqm of internal floorspace, plus 822 sqm of external floorspace.
- Food and Beverage Units 3, 4 & 5: 556 sqm of internal floor space.
- Retail Unit 6: 172 sqm (development and occupied by Costa Coffee as a drive to and drive thru outlet).

Outline Planning Permission

- Creative and Community Hub 766 sqm of flexible multi-use space designed to be an inclusive facility that can be community-led, and which will contribute to the role of the Town Centre as the cultural heart of the community.

Figure 34: Proposed Site Plan LPA Ref: 21/05058/FUL

Diversity of Uses

217. In order to assess the diversity of uses of the centre, Experian Goad data from November 2023 was taken and updated based on LSH site visit in January 2025 to provide an updated view of the retail and leisure mix.

218. It should be noted that the Experian Goad area does not perfectly align with the town centre boundary, with Goad's coverage reflecting an area that is marginally smaller than the defined town centre boundary. The area excluded in Goad's coverage is the south of the defined town centre, which includes Brio Leisure Winsford Lifestyle Centre, Winsford Job Centre, Cheshire and Warrington Growth Hub and Cheshire West and Chester Council Offices.

219. The table below shows that Winsford has a total of 53 units and an overall quantum of 21,892 sqm of commercial floorspace. This marks a significant reduction in quantum of outlets (92) and floorspace (25,639 sqm) identified by the Cheshire Retail Study of April 2016, which was informed by a site visit in July 2015.

220. The significant reduction is as a direct result of the comprehensive redevelopment proposal for the town centre and the demolition of buildings no longer fit for purpose pursuant to LPA Ref: 21/05058/FUL. The difference demonstrates that 39 outlets are no longer present within the centre –18 of which were identified as vacant within the previous health check assessment.

Figure 35: Outlets and Floorspace

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% Total Floorspace	
		Winsford	UK Average		Winsford	UK Average
Comparison Retail	21	39.6%	26.4%	5160	23.6%	29.4%
Convenience Retail	8	15.1%	9.3%	12070	55.1%	15.6%
Retail Services	7	13.2%	15.9%	660	3.0%	7.3%
Leisure Services	7	13.2%	25.8%	1352	6.2%	26.7%
Financial & Business Services	4	7.5%	8.3%	440	2.0%	6.3%
Vacant	6	11.3%	14.1%	2210	10.1%	14.2%
Total	53	100%	100%	21892	100%	100%

Source: LSH Site Visits (January 2025), Experian Goad Data (November 2023)

221. The composition of the 21 comparison retail outlets (39.6%) within Winsford means that its provision significantly exceeds the UK average of 26.4%. Despite this the proportion of floorspace (23.6%) associated with comparison retail is lower than the UK average (29.4%). Despite the demolition of a significant number of outlets, this conclusion is consistent with the findings of the proportion of comparison retail within Winsford that was identified in the previous health check assessment. This indicates that the comparison retail offer within Winsford comprises of outlets with modest floorspace. The majority of these outlets are located within the Winsford Cross Shopping Centre. The composition of comparison operators includes national multiples including Argos, B&M Bargains, Boots, and Home Bargains.

222. It is to be noted that B&M Bargains currently occupies 1,170 sqm of floorspace within the Winsford Cross Shopping Centre. As highlighted above, Winsford Town Centre is subject to a comprehensive regeneration proposal that includes 2,473 sqm of

internal floorspace, plus 822 sqm of external floorspace (comprising of Retail Units 1 & 2 of LPA Ref: 21/05058/FUL) which are to be occupied by B&M as a new superstore and garden centre. It is anticipated that B&M will move into the new superstore in 2025.

223. Convenience retail provision within Winsford exceeds both the UK average in respect of both the number of outlets (15.1% vs 9.3%) and the quantum of floorspace (55.1% vs 15.6%). This represents a reduction in the number of outlets (11) in comparison to the previous health check assessment, but a substantial increase in the quantum floorspace (increasing from 8,441 sqm to 12,070 sqm). The Aldi, Asda, and Farmfoods stores collectively comprises of 9,810 sqm of floorspace, which accounts for 81% of convenience retail floorspace within the town centre.

224. There is a lower provision of retail services both in terms of outlets and floorspace in Winsford when compared to the UK average – with seven units (13.2%) covering just 660 sqm of floorspace (3.0%). Provision less than the UK average is consistent with the findings of the previous health check assessment. The current retail services offer includes health & beauty operators, opticians, a photo processing operator, and the Post Office.

225. Similarly there is currently an underrepresentation of leisure services, and financial & business services within Winsford with a total of 11 outlets equating to 20.7% of all outlets (compared to the UK average of 34.1%). The floorspace associated with these uses equates to just 8.2% (1,792 sqm) of the total floorspace which is also considerably below the UK average of 33.0%. The composition of leisure services and financial & business services is not significantly different from that identified in the previous health check assessment (with 15 units identified, and 11.2% of floorspace in these uses at July 2015).

226. Despite the identified underrepresentation, the leisure and financial & business services do include JD Wetherspoon and Nationwide Building Society.

Figure 36: Food & Beverage Outlets and Floorspace

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% Total Floorspace	
		Winsford	UK Average		Winsford	UK Average
Bars and Wine Bars	0	0.0%	2.3%	0	0.0%	2.4%
Cafes	2	3.8%	5.1%	510	2.3%	2.9%
Fast Food & Takeaway	3	5.7%	6.1%	790	3.6%	3.1%
Public Houses	1	1.9%	2.6%	100	0.5%	3.4%
Restuarants	0	0.0%	5.1%	0	0.0%	4.3%
Total	**6**	**11.3%**	**21.2%**	**1400**	**6.4%**	**16.1%**

Source: Experian Goad and LSH Site Visit (January 2025)

227. The food and beverage provision in Winsford is limited, with six outlets in total – which equates to 11.3% of Winsford's total floorspace. Half of the outlets are fast food & take-aways, with The Coffee House (cafe), and The Queens Arms, JD Wetherspoons (public houses) also forming part of the composition.

228. Most notably, a new Costa Coffee drive-to and drive-thru has opened within the town centre. This comprises of 172 sqm of floor space and has been delivered as

part of the comprehensive regeneration activity being undertaken across the town centre.

229. The Queens Arms is the largest food and beverage operator in Winsford, taking up approximately 500 sqm of floorspace.

Vacancies

230. There are a total of six vacant outlets in Winsford which represents 11.3% of the overall outlets (lower than the UK average of 14.1%). In total, 10.1% of the total floorspace (2,210 sqm) are sat vacant. It should be noted that two of the vacant outlets are currently being used as site offices by Kier Construction and RML Roofing Contractors. At the time of writing the Council have made us aware that two of the larger vacant units within the centre are under offer from potential occupiers.

231. The current vacancy rate within Winsford is different to that identified in the previous health check assessment (six vs 21 vacant units). The reduction in the number of vacant outlets in the town centre is as a direct result of the demolition of buildings no longer fit for purpose as part of the comprehensive regeneration of the town centre. Despite the quantum of vacant units reducing, the proportion of floorspace currently vacant is 10.1%, which is consistent with the position identified within the previous health check assessment.

Markets

232. As noted in the NPPF, markets play an important role in supporting the vitality and viability of centres and local communities and there is policy support for the retention and enhancement of existing markets and creation of new ones.

233. Winsford’s indoor market is located within the town centre adjacent to the Asda Winsford superstore and the Winsford Cross Shopping Centre. The market is open Monday, Thursday, and Saturday, 9am to 4pm. A variety of goods are on offer, including vinyl records, jewellery, watches and repairs, rugs, beds and carpets, pet stall, school/workwear and handcrafted gifts and homeware, babywear, florist, tattooist, children accessories, cakes, eggs, deli, and a traditional greengrocer. A café is also available at the market.

Retailer Requirements

234. Demand from retailers and leisure operators for representation in a centre is an important indicator of a centre’s overall health and viability. The latest published market demand report is set out in the table below:

Table 7: Retailer Requirements, Winsford

Recorded Date	Operator	Sector	Min Sqm	Max Sqm
Jul 24	KFC	Leisure Service	110	230
Mar 24	Lidl	Convenience Retail	1,700	2,500
		Total	**3,510**	**5,980**

Source: The Requirement List

235. As of January 2025, a review of published operator requirements identified three recorded requirements from retail and leisure operators since March 2024, seeking a combined maximum floorspace of up to 5,980 sqm.

236. It should be noted that these are not necessarily operators seeking representation within the centre itself but potentially out-of-centre locations and retail parks.

237. It is also possible that these operators are not looking for opportunities in Winsford specifically, rather they are looking for opportunities in areas similar to and including Winsford.

238. Independent/smaller operators do not tend to document their desire for retail space in the same way as the larger national multiples and fast-growing organisations, and so gauging the demand for retail space from these businesses is harder.

239. The Council understand from their own sources that Sports Direct, Peacocks and Poundland are other potential stores interested in locating in the town – although to note that the interest from Poundland came before the announcement of planned store closures.

Commercial Rents and Yields

240. Over recent years the UK Retail sector has experienced a significant number of corporate failures, which has often resulted in Creditor Voluntary Arrangements (CVAs) or pre-pack administrations. Retailers and restaurateurs have frequently used these processes to effectively impose lower rentals, turnover rents, and flexible leases onto landlords. The upshot of this is rental levels can vary widely, even for identical shops adjacent to each other.

241. In light of the above and current vacancy rates, solvent retailers have adopted aggressive positions at lease renewal seeking to drive rents down and reduce lease commitments, regardless of comparable evidence.

242. The impact of the pandemic has exaggerated this trend, and flexible leases and turnover linked rents are becoming more common place. In many cases landlords have adopted the policy that keeping a shop occupied, and thereby mitigating void costs is preferable to maintaining a rental tone within a retail location.

243. A broad estimate of prime rental tone within the Winsford Cross Shopping Centre would indicate a rental level in the region of £20/sqft – £25/sqft. However, information that the Council has would indicate a range of £10/sqft - £15/sqft.

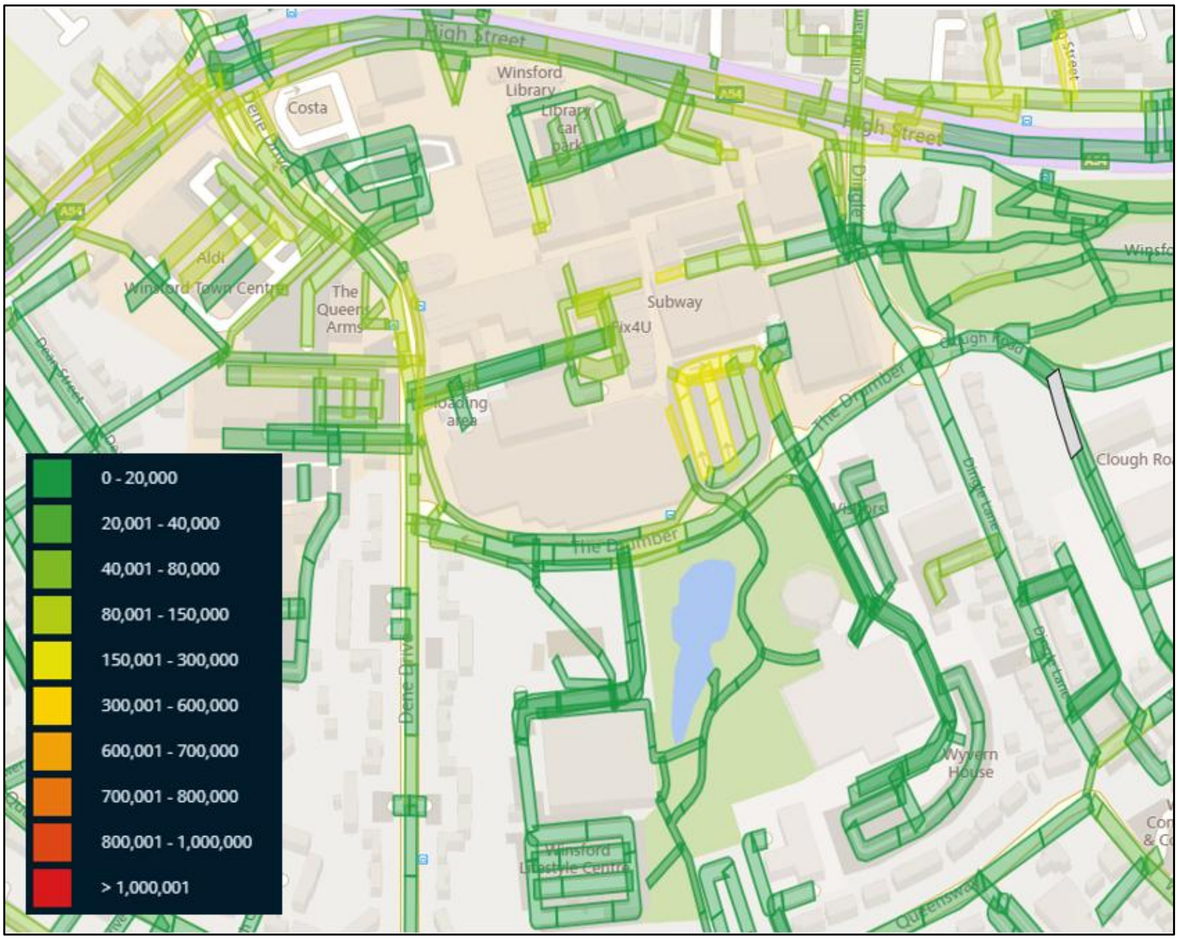
244. In terms of investment yields, retail as an asset class has seen a significant fall in value over the past decade. Transactional volumes in 2023 were subdued with high interest rates and global political uncertainties impacting on investor sentiment. Clearly, there are many factors that impact on town centre retail yields including lease length, tenant covenant and basis of rent review but in the broadest terms we would comment as follows:

- Prime high street yields – 6.75%
- Good secondary high street yields – 9%
- Secondary high street yields – 12%.

Pedestrian Flows

245. The figure below illustrates the pedestrian flows for Winsford in the form of a heat map showing total pedestrian movements for November 2024. As can be seen, the largest concentration of footfall within the centre is around the Asda Winsford superstore.

Figure 37: Winsford Footfall Heat Map, November 2024

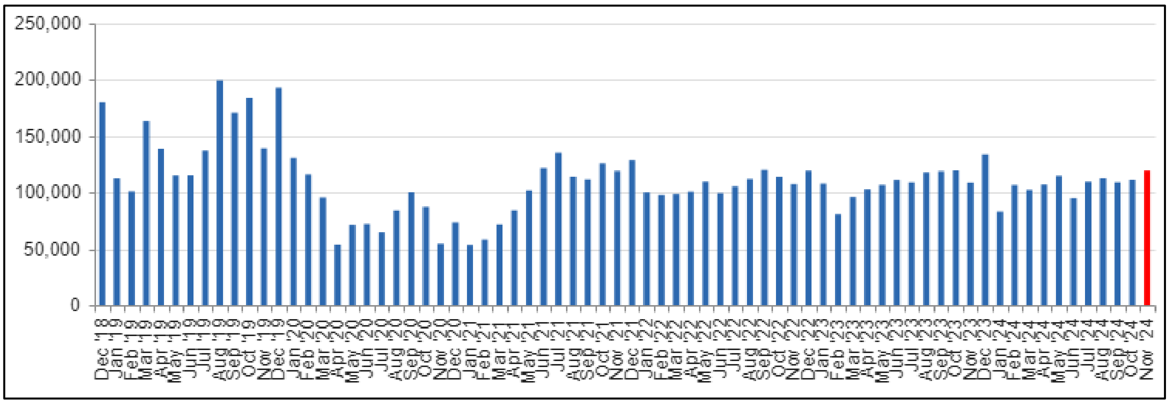


Source: MSCI

246. A busy section of pedestrian walkway, located adjacent to Asda Winsford superstore and EE Mobile Phone Shop, was sampled to obtain information on how footfall levels have changed between December 2018 and November 2024.

247. As can be seen in the figure below pedestrian activity dropped in line with the heights of the pandemic-related restrictions on travel and movement between February 2020 – April 2021. Whilst figures have grown since, the trend of the footfall count shows stable activity but less than pre-pandemic figures. The figures show that the peak footfall month for Winsford over this period was August 2019 (200,000). Figures since mid-2022 show that the footfall count is between 80,000 and 140,000 per month.

Figure 38: Monthly Footfall Activity, December 2018 – November 2024, Asda / EE



Source: MSCI

Accessibility

248. Winsford is particularly well connected to the road network, the A54 bounds the defined centre to the north cutting from east to west and Dene Drive runs through the centre to the south. The A54 can be follow east to Middlewich, and west to Chester. Dene Drive leads to the residential neighbourhoods situated to the south of Middlewich. Davenham and Northwich are also easily accessible by the road network to the north of Winsford.

249. Winsford Shopping Centre has ample parking provision. With several surface level car parks being available for both the Winsford Cross Shopping Centre and respective outlets (i.e Aldi, Farmfoods, Costa etc) as well as a multi-storey car park. Additional car parking provision will be made available once the initial phase of the regeneration project has been completed. Where car parking is associated with a particular outlet, it is notable that this provision is for customers only, for example at Costa Coffee where there is a large sign.

250. Bus services can be picked up within the centre with routes travelling to Crew, Middlewich, Northwich, and Leighton Hospital.

251. Winsford Train Station is isolated from and situated circa 2.4 kilometres to east of the defined town centre.

252. Accessibility to the centre by bike is considered to be limited with a noticeable absence of cycle lanes and cycle parking within and around the centre.

253. The pedestrian accessibility of the centre is deemed to be good – albeit legibility is currently restricted to the ongoing regeneration activity. The central core of the Winsford Cross Shopping Centre is pedestrianised which provides a safe space for visitors to enjoy. Seating within the Shopping Centre is limited, with the provision accessible only available to customers of the designated outlets (i.e. Al's Place and Greggs).

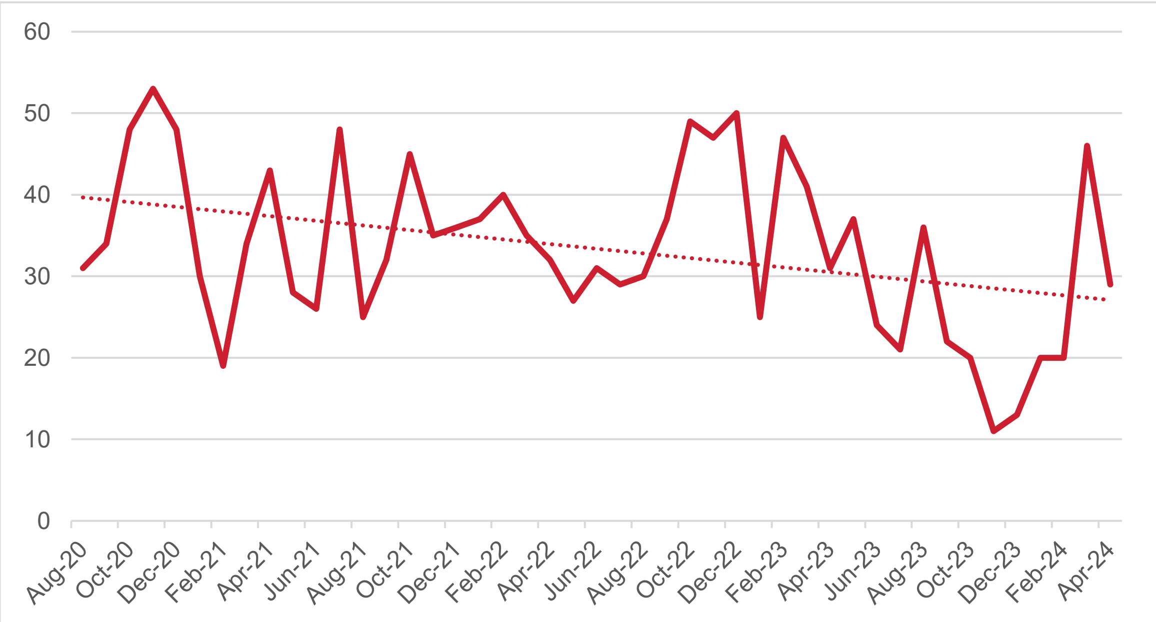
254. As highlighted the centre is dissected by Dene Drive, several traffic light pedestrian crossing can be found along Dene Drive which supports pedestrians navigating the lanes of traffic. Likewise, a pedestrian crossing is to south and provides a crossing across the Drumber.

Crime and Safety

255. A central postcode (CW7 1AS) within Winsford was used to review total crime data within a ¼ mile radius between August 2020 and July 2024.[2] The figure below outlines the total crime rate month by month within this period, as well as a trendline to show the overall change in criminal activity over the four years.

256. As can be seen, despite several spikes in criminal activity, over the period recorded crime levels have been falling during this period. November 2020 represents the peak month for criminal activity (53 recorded crimes).

Figure 39: Winsford Recorded Crimes, August 2020 – July 2024



Source: UKCrimeStats

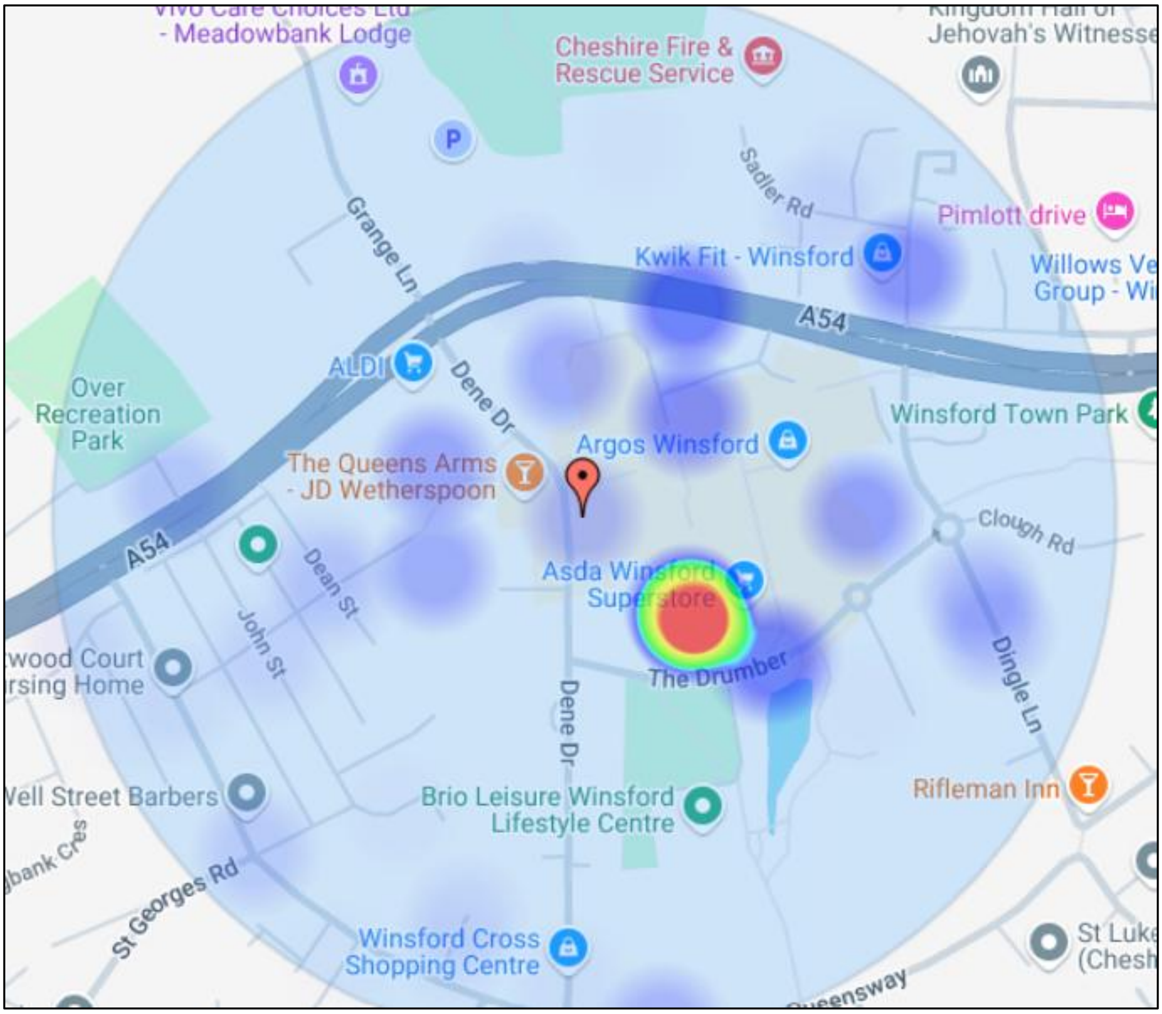
257. The figure below shows a heat map representing criminal activity within the same area and for the same period outlined previously. As can be seen, criminal activity

[2] The period used to analyse crime statistics in Winsford (August 2020 -July 2024) differs from that used (November 2020 – October 2024) to analyse other centres within the study area. This is due to the availability of data through UKCrimeStats for Winsford.

is concentrated around the Asda Winsford superstore. Across the centre the heat map identifies other areas subject to concentrations of criminal activity

258. The top three types of crimes recorded within this area during this period are anti-social behaviour (448 recorded incidences), shoplifting (245 recorded incidences) and public order offences (219 recorded incidences).

Figure 40: Winsford Crime Heat Map, August 2020 – July 2024



Source: UKCrimeStats

Environmental Quality

259. The overall environmental quality of Winsford is currently affected by the insular nature of the Winsford Shopping Centre – with a significant proportion of 'back-of-house' services and services areas having a detrimental effect on the environmental quality of Winsford. Improvement is required to enhance the character and appearance of the centre, as well as to enhance its legibility. The lack of benches, cycle parking and bins was noticeable within the centre.

260. Likewise, the environmental quality of the centre is currently compromised as a result of comprehensive regeneration works being undertaken – with large areas being used as construction compounds or for works associated with the

regenerative activity. The central entrances into the shopping centre are currently inaccessible due to the construction compound associated with Retail Units 1 & 2, and the new town centre car park.

261. Notwithstanding that the positive effects of the regenerative activity have already been seen across, with areas of new and accessible public realm already in-situ. Most notable the town centres Grade II listed war memorials (List Entry: 1310406) to outside of the Winsford Library, has had a considerable beneficial effect on the public realm of the centre. Likewise, around Retail Unit 6, the new Costa Coffee drive-in/drive-thru provides a positive addition and assist in supporting the feel of an activated centre.

262. The further regeneration of the centre should also help in creating a welcoming and pleasant centre to visit and spend time in.

Evening and Night Time Economy

263. A strong evening and night time economy can often be a good indicator of a strong, vital, and viable centre. A vibrant evening and night time economy is underpinned by a quality leisure offer within a centre, and so a sample of predominantly leisure outlets within Winsford have been selected with their opening times and more importantly closing times recorded to get a sense of the provision of the evening offer. As demonstrated the leisure offer within Winsford is extremely limited, the offer sample identified is reflective of this position.

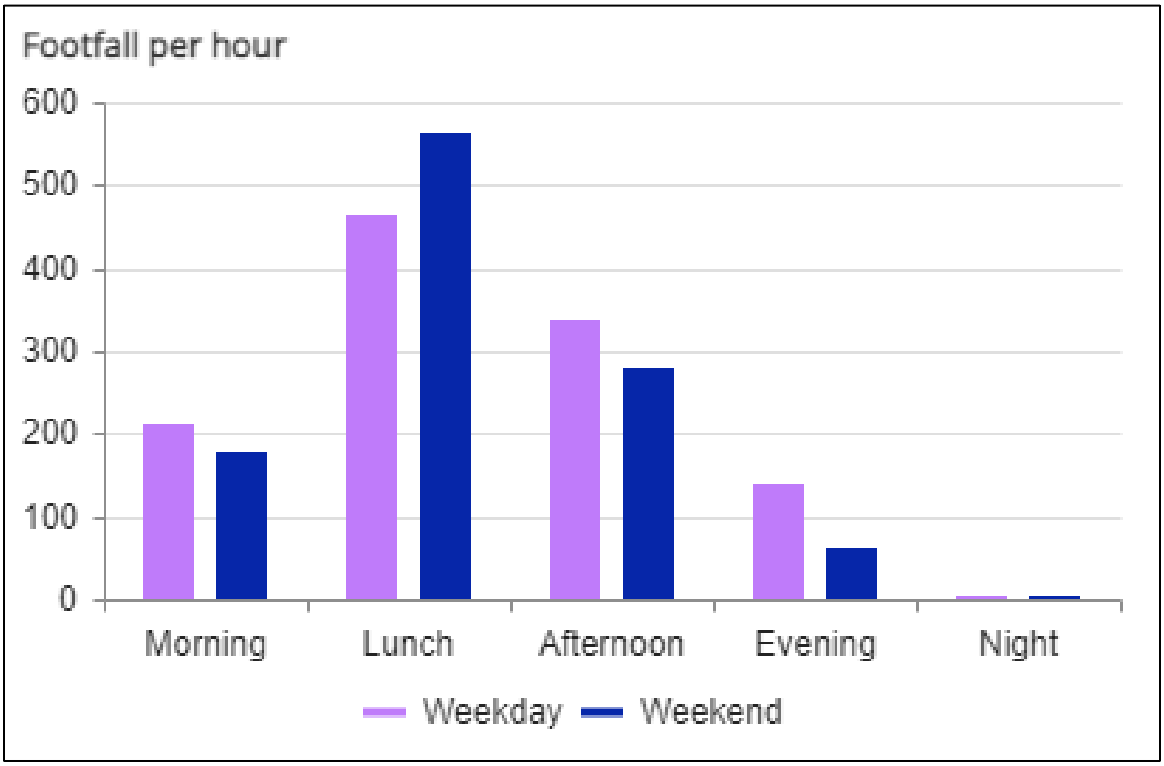
Table 8: Leisure Operator Sample

Retailer Name	Type	Open	Close
The Queens Arms – JD Wetherspoons	Pub	8am	12am

Source: LSH Research

264. The figure below shows how footfall levels differ across different parts of the day. As can be seen, it is unspringing that footfall in an evening (5pm – 9pm) is less than throughout the day given this limited leisure offer. Despite that the figure shows that that there remains a modest amount of footfall, which we anticipate being attributed to the central location of Asda within the centre, and the shopping habits of those using the supermarket.

Figure 41: Evening Footfall (November 2024)



Source: MSCI

Conclusion

265. Overall, the Strengths, Weaknesses, Opportunities, Threats (SWOT) can be summarised as follows.

Strengths

- Good road access/connectivity and ample convenient parking provision across the centre.
- Winsford Cross Shopping Centre provides a safe, pedestrianised shopping experience.
- Indoor market.
- Declining levels of crime.

Weaknesses

- Limited leisure services offer, largely due to a lack of food & beverage provision.
- Low environmental quality in parts – largely due to presence of unkept 'back-of-house' services.
- Current general lack of greenery, vibrancy and green spaces (due to be addressed as part of the comprehensive regeneration of the centre).
- Low levels of evening footfall, particularly on the weekend.

Opportunities

- Enhanced quality of the retail and leisure facilities as a result of the comprehensive redevelopment of the centre, including the new B&M store, and additional food and beverage facilities.
- Increased greenery and vibrancy across the centre (e.g. through planters, hanging baskets and pocket parks) – build on the start made as a result of the relocation of the war memorials and public realm work.
- Improvements to cycle accessibility (routes and parking).

Threats

- Further high street retail closures.
- High/increasing business operating costs.

266. We therefore conclude that Winsford has a positive role to play in meeting the day to day needs of its immediate catchment, and has an ability to draw visitors in from further afield due to the strong comparison and convenience retail provision which includes Asda and B&M. The redevelopment and regeneration of the centre provides an opportunity for the centre to become more diverse and retain its relevance as the hub of local communities.

6. Neston Town Centre Health Check

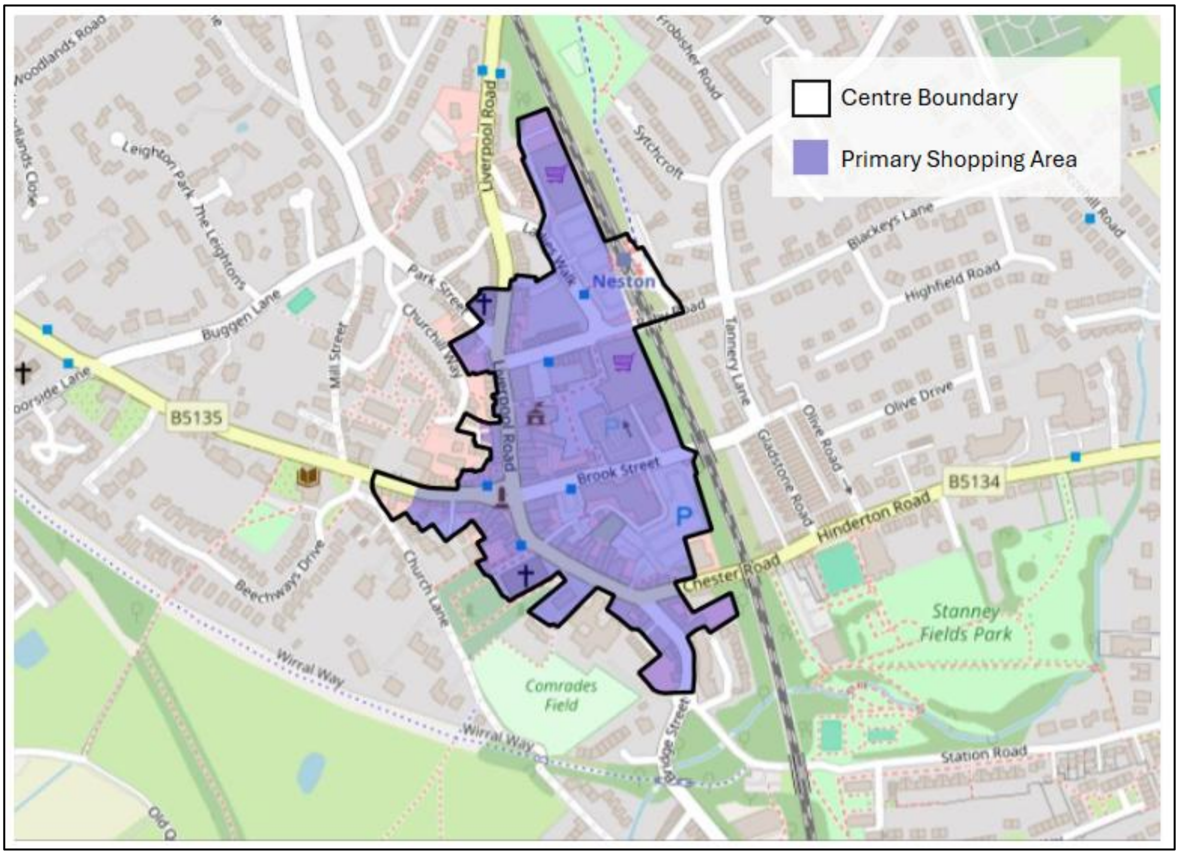
Overview

267. Neston is a historic affluent market town, and one of the smallest defined centres within Cheshire West and Chester. The town is situated on the Wirral Peninsula and is the most northern and most western town within the authority area.

268. The centre is traditionally linear in nature, with retail and leisure outlets running north, east, south, and west from 'The Cross' (a central point within the centre). Sainsbury's and Aldi supermarkets are also encompassed within the town centre. In addition to the permanent retail/leisure provision within the centre, Neston's weekly Friday market provides further provision for the town.

269. The centre has several car parking areas which is reflective of Neston being situated within a rural part of the authority area and is associated with high levels of car usage.

Figure 42: Neston Town Centre Boundary and Primary Shopping Area



Diversity of Uses

270. Experian Goad data from November 2023 has been used to assess Neston's mix of uses and has been updated based on an LSH site visit in January 2025 to provide a current view of the retail and leisure mix.

Lambert Smith Hampton

271. The table below shows that Neston has a total of 89 units and an overall quantum of 12,450 sqm in floorspace. The previous composition of Neston was identified within the Cheshire Retail Study of April 2016 based on a site visit in July 2015. The previous health check assessment identified that there were 93 outlets within the centre as of July 2015. There has therefore been a modest reduction in the number of outlets within the town centre in recent years.

Figure 43: Outlets and Floorspace

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% Total Floorspace	
		Neston	UK Average		Neston	UK Average
Comparison Retail	21	23.6%	26.4%	2100	16.9%	29.4%
Convenience Retail	7	7.9%	9.3%	4400	35.3%	15.6%
Retail Services	15	16.9%	15.9%	1040	8.4%	7.3%
Leisure Services	15	16.9%	25.8%	1970	15.8%	26.7%
Financial & Business Services	11	12.4%	8.3%	870	7.0%	6.3%
Vacant	20	22.5%	14.1%	2070	16.6%	14.2%
Total	**89**	**100%**	**100%**	**12450**	**100%**	**100%**

Source: Experian Goad and LSH Site Visit (January 2025)

272. Comparison retail represents the largest proportion (23.6%) of outlets across the centre, slightly less than the UK average of 26.4%. The total floorspace associated with comparison retail outlets (16.9%) is significantly below the national average (29.4%). Almost one in four units in the centre fall within the comparison retail offer. There is a limited number of comparison retail national multiples within the centre. This is unsurprising given the small nature of the centre, and the propensity of larger centres to support a greater proportion of comparison goods floorspace.

273. The previous health check data of July 2015 identified a total of 22 comparison goods outlets, with a combined floorspace of 2,333 sqm. The reduction in comparison retail since 2015 has been limited, with the loss of only one comparison outlet and 233 sqm of floorspace.

274. Convenience retail outlets (7.9%) are also slightly under-represented within Neston when compared to the UK average (9.3%). However, the quantum of Neston's floorspace associated with these units (35.3%) significantly exceeds the UK average (15.6%), and in that respect the centre is well provided for. In respect of both the number of outlets and floorspace the composition of convenience retail has been subject to a limited increase up from the six outlets and 4,388 sqm identified within the previous Neston Town Centre health check. The exceedance of the national floorspace average is as a direct result of Sainsbury's (2,380 sqm) and Aldi (1,460 sqm) representation within the town centre. The two retailers provide a combined 3,840 sqm of gross floorspace which accounts for 87.3% of the total quantum dedicated to such retailers.

275. There is a greater quantum of both retail services (16.9%) and financial & business service (12.4%) outlets when compared to the UK averages (15.9% and 8.3% respectively). The proportion of retail services floorspace (8.4%) also exceeds the UK average (7.3%). Both retail outlets and floorspace are dominated by health & beauty operators (12 outlets). The associated quantum of floorspace associated with financial & business service outlets (7.0%) also exceeds the UK average

(6.3%). Nine of the financial & business service outlets are occupied by operators providing legal, financial or property services. There is a notable absence of national high street banks within Neston.

276. Leisure services are notably underrepresented in terms of both the number of outlets and quantum of floorspace within Neston. A total of 15 outlets equates to 16.9% (compared to the UK average of 25.8%), and 1,970 sqm of floorspace represents 15.8% of the total (compared to the UK average of 26.7%).

277. Comparing the breakdown with the Neston health check assessment provided in the previous Cheshire Retail Study (April 2016), it is apparent that:

- there has been a limited increase in the provision of convenience retail outlets and floorspace rising up from the six outlets and 4,388 sqm of floorspace previously identified;
- the provision of retail service outlets has decreased by 25%, down from the 20 previously identified.
- the associated quantum of floorspace has decreased by 193 sqm from the 1,236 sqm previously identified;
- there has been a considerable reduction (-38%) in the quantum of financial & business service outlets, and an associated reduction of 937 sqm of floorspace from the 18 outlets and 1,807 sqm of floorspace previously identified; and
- the quantum of leisure outlets has increased by 3, rising up from the 12 previously identified and the associated floorspace has increased by 269 sqm from the 1,970 sqm previously identified.

Figure 44: Food & Beverage Outlets and Floorspace

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% Total Floorspace	
		Neston	UK Average		Neston	UK Average
Bars and Wine Bars	0	0.0%	2.3%	0	0.0%	2.4%
Cafes	3	3.4%	5.1%	310	2.5%	2.9%
Fast Food & Takeaway	3	3.4%	6.1%	360	3%	3.1%
Public Houses	3	3.4%	2.6%	490	3.9%	3.4%
Restaurants	4	4.5%	5.1%	550	4.4%	4.3%
Total	**13**	**14.6%**	**21.2%**	**1710**	**13.7%**	**16.1%**

Source: Experian Goad and LSH Site Visits (January 2025)

278. With the exception of public houses (3.4% vs 2.6%), all food & beverage operator types fall below the UK average in respect of both the number of outlets and quantum of floorspace. As a result food & beverage operators as a whole account for 14.6% of all units in the centre, and 13.7% of the total floorspace.

279. Given the limited number of food & beverage outlets within the centre, the limited presence of national multiples within the centre is unsurprising – with only Costa Coffee and Domino’s present. The remaining food & beverage offer comprises of independent operators including the Elephant and the Blue Bicycle cafés, and the Greenland Fishery and the Brown Horse public houses.

Vacancies

280. There are a total of 20 vacant outlets in Neston which represents 22.5% of the overall outlets (higher than the UK average of 14.1%). A total of 16.6% of the floorspace (2,070 sqm) in Neston is vacant. This is an increase from the position identified in the previous Retail Study when 15 units (equating to 16.1% of all commercial units) and 1,909 sqm of floorspace (equating to 14.3% of the stock of floorspace was recorded as being vacant.

Markets

281. As noted in the NPPF, markets play an important role in supporting the vitality and viability of centres and local communities and there is policy support for the retention and enhancement of existing markets and creation of new ones.

282. Neston does not have an indoor market. However, a weekly outdoor market is held within the market square every Friday between 8am – 2pm. The Market offers a wide range of goods including shoes, jewellery, gifts, sweets, plants, beauty products, home wares and pet supplies as well as fresh fruit and vegetables, meats, fish, cheese, and a variety of bakery produce including Greek, Persian, French and British. A coffee van and hot food stalls are also present.

Retailer Requirements

283. Demand from retailers and leisure operators for representation in a centre is an important indicator of a centre's overall health and viability. The latest published market demand report is set out in the table below:

Table 9: Retailer Requirements, Neston

Recorded Date	Operator	Sector	Min Sqm	Max Sqm
Mar 24	Lidl	Convenience Retail	1,700	2,500
		Total	**1,700**	**2,500**

Source: The Requirement List

284. As of January 2025, a review of published operator requirements identified one recorded requirement from retail and leisure operators since March 2024, seeking a combined maximum floorspace of up to 2,500 sqm.

285. It should be noted that these are not necessarily operators seeking representation within the centre itself but potentially out-of-centre locations and retail parks.

286. It is also possible that these operators are not looking for opportunities in Neston specifically, rather they are looking for opportunities in areas similar to and including Neston.

287. Independent/smaller operators do not tend to document their desire for retail space in the same way as the larger national multiples and fast-growing organisations, and so gauging the demand for retail space from these businesses is harder.

Commercial Rents and Yields

288. Over recent years the UK Retail sector has experienced a significant number of corporate failures, which has often resulted in Creditor Voluntary Arrangements (CVAs) or pre-pack administrations. Retailers and restaurateurs have frequently used these processes to effectively impose lower rentals, turnover rents, and flexible leases onto landlords. The upshot of this is rental levels can vary widely, even for identical shops adjacent to each other.

289. In light of the above and current vacancy rates, solvent retailers have adopted aggressive positions at lease renewal seeking to drive rents down and reduce lease commitments, regardless of comparable evidence.

290. The impact of the pandemic has exaggerated this trend, and flexible leases and turnover linked rents are becoming more common place. In many cases landlords have adopted the policy that keeping a shop occupied, and thereby mitigating void costs is preferable to maintaining a rental tone within a retail location.

291. A broad estimate of prime rental tone within Neston would indicate a rental level in the region of £15/sqft – £20/sqft. Based on the rents that the Council think are realistic in other centres however, these estimates may be too high.

292. In terms of investment yields, retail as an asset class has seen a significant fall in value over the past decade. Transactional volumes in 2023 were subdued with high interest rates and global political uncertainties impacting on investor sentiment. Clearly, there are many factors that impact on town centre retail yields including lease length, tenant covenant and basis of rent review but in the broadest terms we would comment as follows:

- Prime high street yields – 6.75%
- Good secondary high street yields – 9%
- Secondary high street yields – 12%.

Pedestrian Flows

293. The figure below illustrates the pedestrian flows for Neston in the form of a heat map showing total pedestrian movements for November 2024.

Figure 45: Neston Footfall Heat Map, November 2024

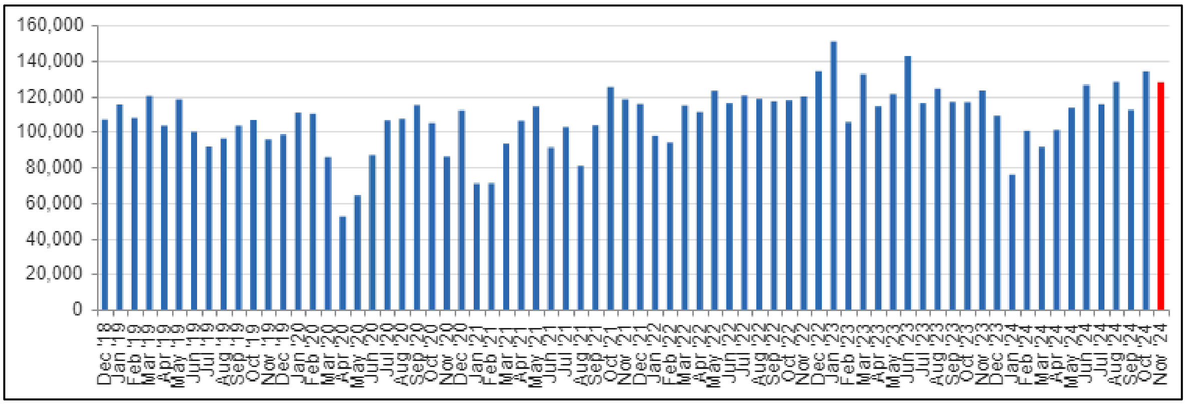
Source: MSCI

294. A busy section of the B5136, located between Tesco Express and Costa Coffee, was sampled to obtain information on how footfall levels have changed between December 2018 and November 2024.

295. As can be seen in the figure below, footfall levels indicate that pedestrian activity dropped in line with the height of the pandemic-related restrictions in April 2020. However, figures rapidly increased from May 2020, with figures quickly returning to pre-pandemic levels. Since then, despite some fluctuations in activity, footfall activity has remained consistent, with activity frequently being around the 120,000 count.

Exceptions to this are January and February 2021 where activity reduced to 70,000 counts, and January 2024 where activity reduced to 75,000 counts. The peak month for footfall activity over the period was January 2023 where activity increased to 150,000 counts.

Figure 46: Monthly Footfall Activity, December 2018 – November 2024, between Tesco Express and Costa Coffee



Source: MSCI

Accessibility

296. Neston is well connected by road, the B5136 cutting through from north to south, and the B5134 cutting through from west to east. Both roads can be followed east to gain direct access onto the A540 which provides access north to the Wirral Peninsula and south to Chester, and onto the strategic road network and destination beyond.

297. Given the small size of Neston car parking provision is ample. Alongside the Neston Town Centre Short Stay multi-storey car park, there is also provision of free parking spaces provided at Brook Street and Chester Road. Parking is also available for Aldi customers only to the north of the centre, and at the adjacent Park and Ride Neston. At the time of the site visits the parking provision was being well used, given a sense that most trips are made to the centre by private vehicle.

298. Bus services can be picked up within the centre with routes travelling to Chester, Birkenhead, and West Kirkby.

299. Neston Train Station is located at the heart of the centre and provides services to Wrexham Central and Bidston.

300. The provision of cycle infrastructure within Neston was noticeably limited, with only the limited provision of several Sheffield style cycle stands spread throughout. There was a noticeable absence of on-road cycle infrastructure within the centre.

301. The pedestrian accessibility of the centre is deemed to be legible. The central market square provides a fully pedestrian area that provides a safe space for visitors to enjoy. Seating is also provided within the Market Square. Elsewhere, pedestrians accessibility is provided in the form of footpaths adjacent to roads, with some

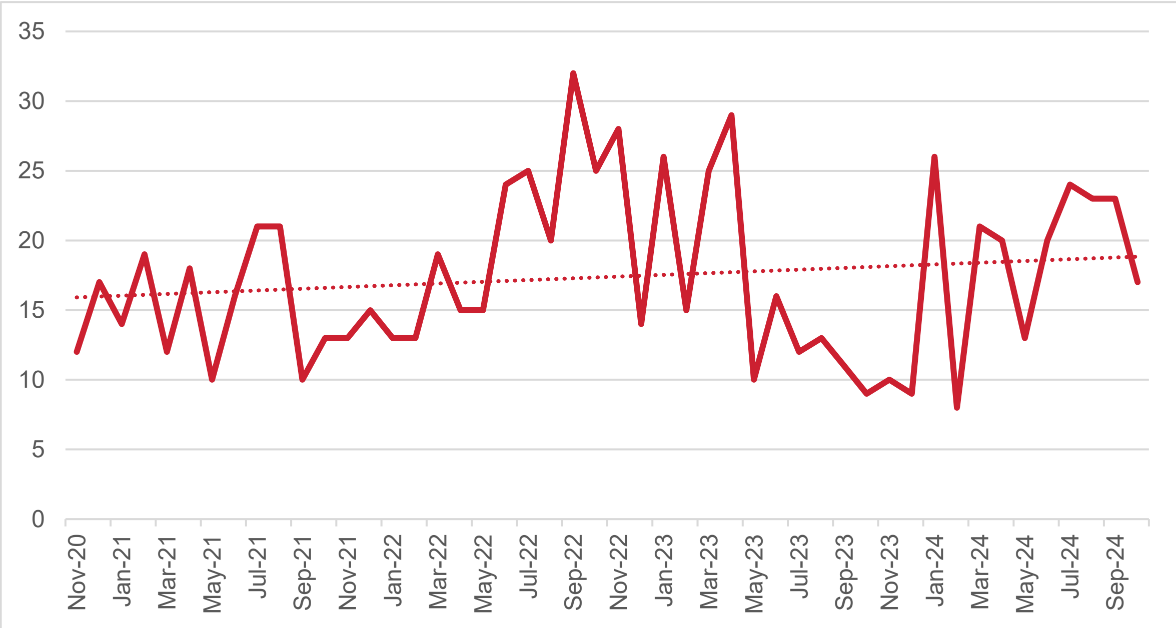
footpaths being narrow, and or non-existent for example outside of the St Mary's and St Helen Parish Church. Crossings are spread out within the centre.

Crime and Safety

302. A central postcode (CH64 9UB) within Neston was used to review total crime data within a ¼ mile radius between November 2020 and October 2024. The figure below outlines the total crime rate month by month within this period, as well as a trendline to show the overall change in criminal activity over the four years.

303. As can be seen, recorded crime levels have trend upwards of the period. Over this period September 2022 represents the peak month for criminal activity in this period (32 recorded crimes).

Figure 47: Neston Recorded Crimes, November 2020 – October 2024

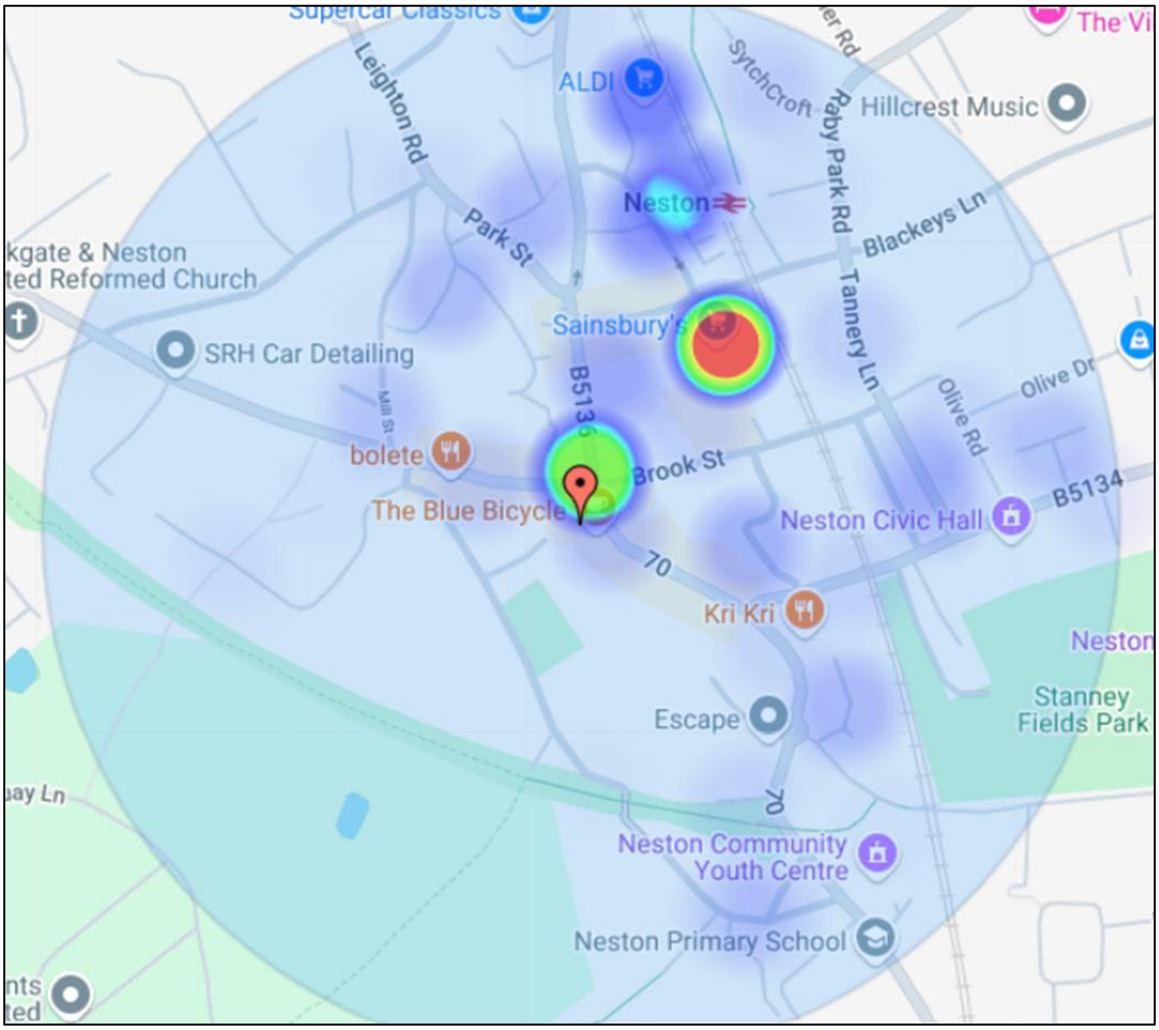


Source: UKCrimeStats

304. The figure below shows a heat map representing criminal activity within the same area and for the same period outlined previously. As can be seen, criminal activity is concentrated around three hotspots within the centre with the largest concentration of criminal activity centred around the Neston Sainsbury's.

305. The top three types of crimes recorded within this area during this period are anti-social behaviour (170 recorded incidences), public order offence (118 recorded incidences), and shoplifting (85 recorded incidences).

Figure 48: Neston Crime Heat Map, November 2020 – October 2024



Source: UKCrimeStats

Environmental Quality

306. Neston town centre is reflective of its market town appeal, with modern and historic elements contributing to its environmental quality. The town is home to at least ten listed buildings located on High Street, The Cross, and Parkgate Road which create a sense of historical character which enhances the visual appearance of the town centre.

307. Key components of the area's environmental quality include planting and greenery, street furniture including benches and decorative elements – particularly within Market Square. The inclusion of a Parklet providing seating and planting outside of Paisley Grey café was noticeable and provided a soft environment feature along high street otherwise dominated by the highway. Bin provision throughout the town centre was also noticeable.

308. The environmental quality of the town centre is however impacted by the trafficked nature of High Steet which cuts through the centre from north to south – the relationship of the centre and this road does impede the pedestrian friendly nature

of the centre. Likewise, the environmental quality is adversely impacted by the extent of vacant properties on Brook Street, and the significant state disrepair of building at a ground floor level.

309. Notwithstanding that, Neston Town centre as whole is pleasant, with a welcoming atmosphere. Overall, Neston Town Centre is balanced with a mix of features creating an attractive and functional environment quality for both residents and visitors.

Evening and Night Time Economy

310. A strong evening and night time economy can often be a good indicator of a strong, vital, and viable centre. A vibrant evening and night time economy is underpinned by a quality leisure offer within a centre, and so a sample of predominantly leisure outlets within Neston have been selected with their opening times and more importantly closing times recorded to get a sense of the provision of the evening offer.

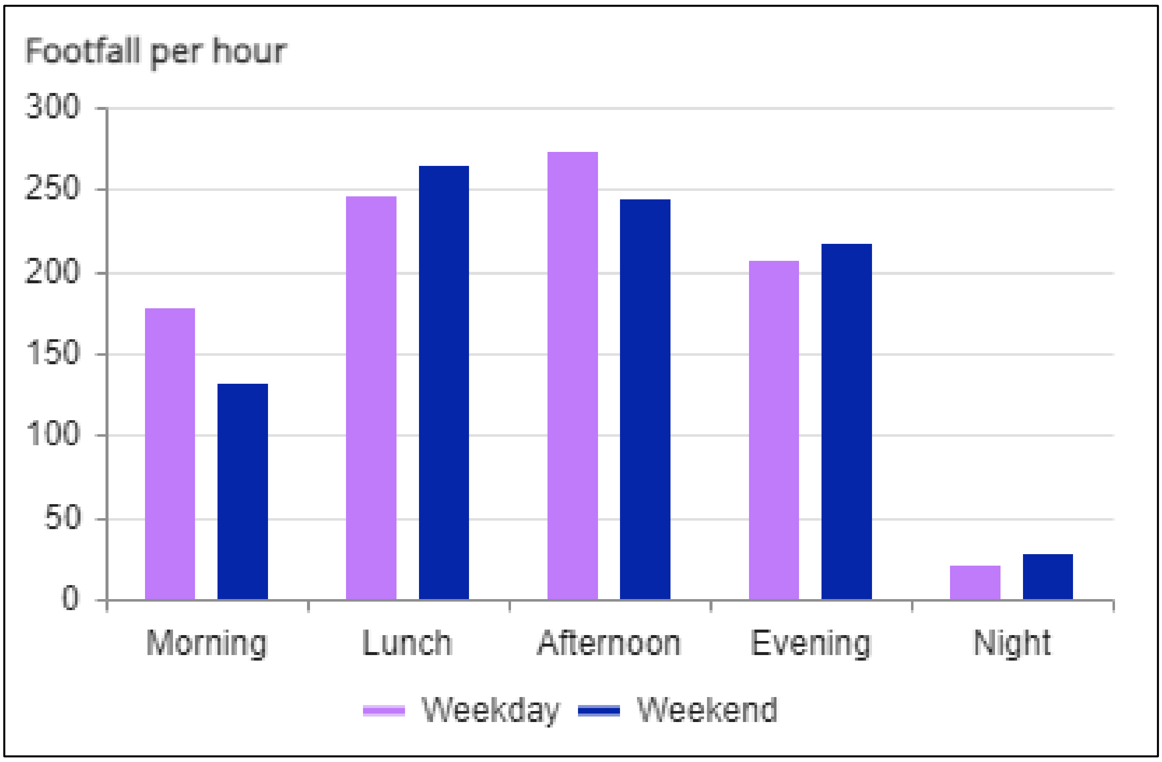
Table 10: Leisure Operator Sample

Name	Type	Open	Close
Kri Kri	Restaurant	4pm	10pm-11pm
Sang Jun Thai Restaurant	Restaurant	1pm – 5pm	10pm – 11:30pm
Burger Laboratory	Restaurant	12pm – 4pm	10pm
The Brown Horse	Pub	12pm	11pm – 12am
The Brewers Arms	Pub	1pm – 5pm	10pm – 12am
The Malt Shovel	Pub	11am – 12pm	11pm – 12am

Source: LSH Research

311. The figure below shows how footfall levels differ across different parts of the day. As can be seen, footfall in an evening (5pm – 9pm) remains high, with limited decline between the afternoon and evening. This indicates that the limited leisure / food and beverage and broader appeal of Neston town centre continues to attract visitors throughout the day, therein indicating a healthy centre.

Figure 49: Evening Footfall, Tesco Express and Costa Coffee (November 2024)



Source: MSCI

Conclusion

312. Overall, the Strengths, Weaknesses, Opportunities, Threats (SWOT) can be summarised as follows.

Strengths

- Strong transport connections – bus and train stations.
- Good road access/connectivity.
- Footfall has been stable and has bounced back well post-pandemic.
- Ample convenient parking provision across the centre.
- Strong evening footfall levels – despite the leisure offer falling below the UK average.
- Outdoor market.

Weaknesses

- Environmental quality is impacted by the heavily trafficked road running through the centre.
- Environmental quality and perception of the centre is negatively impact by the vacant and derelict outlets located on Brook Street.
- High vacancy rates, which is noticeable given the size of the centre.

Opportunities

- Enhanced leisure offer to increase the weekday and weekend footfall further.

- New uses brought in to address vacancies (education, residential, healthcare etc.).
- Improvements to cycle accessibility (routes and parking).

Threats

- Rising crime levels to negatively impact perceptions of safety in the centre.
- Further high street retail closures.
- High/increasing business operating costs.

313. We therefore conclude that Neston provides a pleasant and welcoming environment that serves the day-to-day needs of its catchment consistent with the market town status.

314. Large format, national multiple convenience retailers assist in providing activity in the northern (Aldi) and central (Sainsbury's) parts of the town centre. However, low environmental quality along Brook Street does have a clear detrimental impact on the attractiveness of the centre.

315. Neston continues to face challenges to its vitality and viability, which is exemplified by its high vacancy rate.

Lambert Smith Hampton

7. Frodsham Town Centre Health Check

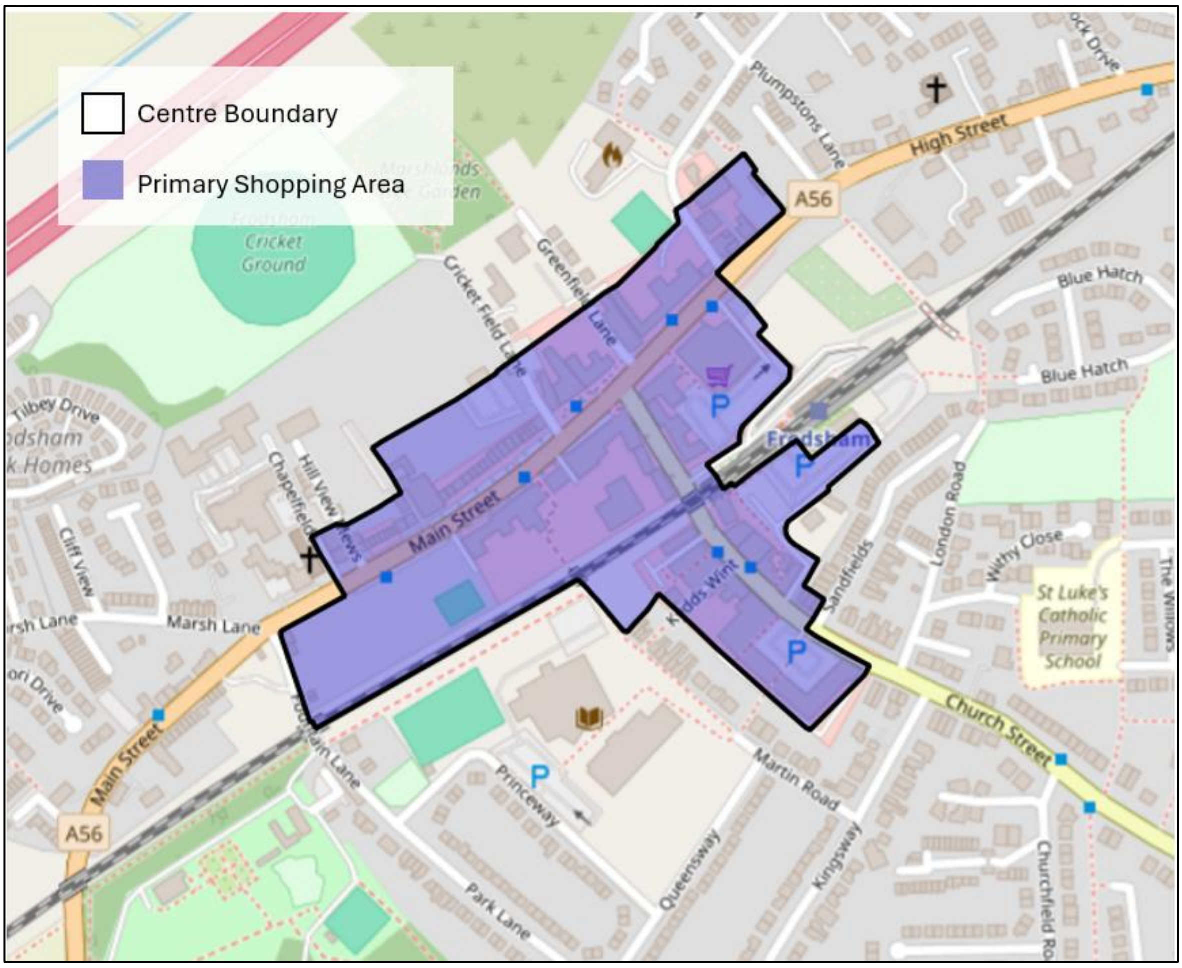
Overview

316. Frodsham is a historic affluent market town and is one of the larger rural settlements within the authority area. The centre is situated adjacent to the boundary of the authority area and is within close proximity (circa 9.5 kilometres) to Runcorn, a town situated within the Halton Borough Council authority area.

317. The centre is linear in nature, with retail and leisure outlets occupying outlets either side of Main Street that are occupied by a mix of shops, cafes, restaurants, public houses, and bars. In addition to the provision along Main Street, the town centre extends south along Church Street underneath the railway line up to Eddisbury Square where further retail and leisure outlets can be found. In addition to the retail/leisure provision the town centre also encompasses a significant proportion of residential dwellings.

318. Frodsham Railway Station is situated immediately to the east of the town centre and provides direct train connections to the adjacent towns of Helsby and Runcorn, as well as to Chester and Manchester.

Figure 50: Frodsham Town Centre Boundary and Primary Shopping Area



Diversity of Uses

319. In order to assess the diversity of uses for the centre an LSH site visit was undertaken in January 2025 to provide an updated view of the retail and leisure mix. At the time of writing no Goad data was available for the centre.

320. The table below shows that Frodsham has a total of 136 units, an increase of 8 units from the previous health check assessment undertaken for Frodsham.

Figure 51: Outlets

	No. of Outlets	% of Total Outlets	
		Frodsham	UK Average
Comparison Retail	25	18.2%	26.4%
Convenience Retail	8	5.8%	9.3%
Retail Services	46	33.6%	15.9%
Leisure Services	31	22.6%	25.8%
Financial & Business Services	13	9.5%	8.3%
Vacant	14	10.2%	14.1%
Total	**137**	**100%**	**100%**

Source: LSH Site Visit (January 2025)

321. The composition of outlets within Frodsham demonstrates that retail services (33.6%) and financial & business services (9.5%) exceed the UK averages (15.9% and 8.3% respectively). The quantum of comparison retail, convenience retail and leisure services are all shown to be below the UK average.

322. Comparison retail within Frodsham accounts for 18.2% (25) of the total outlets. The previous composition of comparison retail identified 30 outlets (at 23.4% of the total provision). Comparison provision includes charity shops (such as Age UK and Oxfam), DIY Improvement Stores, and independent operators. There is a notable absence of comparison national multiples within Frodsham, with the exception of Boots and WH Smith.

323. Convenience retail within Frodsham has been found to be limited, with only 5.8% of the total outlets falling within this category – convenience provision identified in the previous health check assessment account for 10.9% of the total outlets. The composition of convenience retail includes newsagents, vape shops, two butchers (A. Pickup Butchers and H.E Coward Traditional Butchers), a bakery (Devonshire Bakery), as well as two convenience national multiples including a Sainsbury's Local and Morrisons supermarket, which is positioned centrally within the town centre.

324. As shown by the data there is a considerable over provision of retail service outlets in Frodsham (46 outlets equating to 33.6% of the total provision), the composition of which is largely made up of health and beauty operators (37 outlets). Other retail services include three opticians, dry cleaners, and the Post Office. The previous health check assessment identified that 25% of outlets were occupied by retail service operators.

325. Similar to comparison and convenience retail, leisure services are underrepresented in Frodsham. A total of 31 outlets equates to 22.6% of all outlets (compared to the UK average of 25.8%). Thirty of these outlets comprise of food & beverage outlets, an analysis of which is set out below. The other leisure outlet is a betting office. The previous leisure study identified 27 leisure outlets which accounted for 21.9% of the total provision within Frodsham.

326. Financial & business services are marginally overrepresented in Frodsham, with 9.5% of the total outlets falling within this category (against a UK average of 8.3%). The composition of these services include legal, financial and property services. In addition to these Nationwide is represented. This is however a slight reduction in the provision of financial & business services when compared to the previous health check assessment which identified 17 outlets (accounting for 13.3% of the total outlet provision).

Figure 52: Food & Beverage Outlets

	No. of Outlets	% of Total Outlets	
		Frodsham	UK Average
Bars & Wine Bars	1	0.7%	2.3%
Cafes	8	5.8%	5.1%
Fast Food & Take-Away	7	5.1%	6.1%
Public Houses	7	5.1%	2.6%
Restaurants	7	5.1%	5.1%
Total	**30**	**21.9%**	**21.2%**

Source: LSH Site Visit (January 2025)

327. The split of food & beverage outlets in Frodsham is evenly distributed between cafes, fast food & take-aways, public houses, restaurants. The proportion of cafes (5.8%), public houses (5.1%) and restaurants (5.1%) exceeds the UK averages (5.1%, 2.6% and 5.1% respectively). The proportion of bars & wine bars (0.7%), and fast food & take-aways (5.1%) is lower than the UK averages (2.3% and 6.15% respectively).

Vacancies

328. There are a total of 14 vacant outlets in Frodsham which represents 10.2% of the overall outlets (lower than the UK average of 14.1%). The quantum and proportion of outlets vacant as of January 2025 is double that identified in the previous health check assessment (seven).

Markets

329. As noted in the NPPF, markets play an important role in supporting the vitality and viability of centres and local communities and there is policy support for the retention and enhancement of existing markets and creation of new ones.

330. Frodsham does not have an indoor market. However, a weekly outdoor market with over 50 stalls is held on Main Street every Thursday between 6:30am – 3pm. The Market offers a wide range of goods including fruit and veg, Meat, cheese, jams and preserves, flowers, and plants, as well as a delicatessen and a fish monger.

Retailer Requirements

331. Demand from retailers and leisure operators for representation in a centre is an important indicator of a centre's overall health and viability. The latest published market demand report is set out in the table below:

Table 11: Retailer Requirements, Frodsham

Recorded Date	Operator	Sector	Min Sqm	Max Sqm
Sep 24	M&S Food	Convenience Retail	560	2,300
Mar 24	Lidl	Convenience Retail	1,700	2,500
Sep 24	Sense	Comparison Retail	110	560
		Total	**2,370**	**5,360**

Source: The Requirement List

332. As of January 2025, a review of published operator requirements identified three recorded requirements from retail and leisure operators since September 2024, seeking a combined maximum floorspace of up to 5,360 sqm.

333. It should be noted that these are not necessarily operators seeking representation within the centre itself but potentially out-of-centre locations and retail parks.

334. It is also possible that these operators are not looking for opportunities in Frodsham specifically, rather they are looking for opportunities in areas similar to and including Frodsham.

335. Independent/ smaller operators do not tend to document their desire for retail space in the same way as the larger national multiples and fast-growing organisations, and so gauging the demand for retail space from these businesses is harder.

Commercial Rents and Yields

336. Over recent years the UK Retail sector has experienced a significant number of corporate failures, which has often resulted in Creditor Voluntary Arrangements (CVAs) or pre-pack administrations. Retailers and restaurateurs have frequently used these processes to effectively impose lower rentals, turnover rents, and flexible leases onto landlords. The upshot of this is rental levels can vary widely, even for identical shops adjacent to each other.

337. In light of the above and current vacancy rates, solvent retailers have adopted aggressive positions at lease renewal seeking to drive rents down and reduce lease commitments, regardless of comparable evidence.

338. The impact of the pandemic has exaggerated this trend, and flexible leases and turnover linked rents are becoming more common place. In many cases landlords have adopted the policy that keeping a shop occupied, and thereby mitigating void costs is preferable to maintaining a rental tone within a retail location.

339. A broad estimate of prime rental tone within Frodsham would indicate a rental level in the region of £25/sqft – £30/sqft. Based on the rents that the Council think are realistic in other centres however, these estimates may be too high.

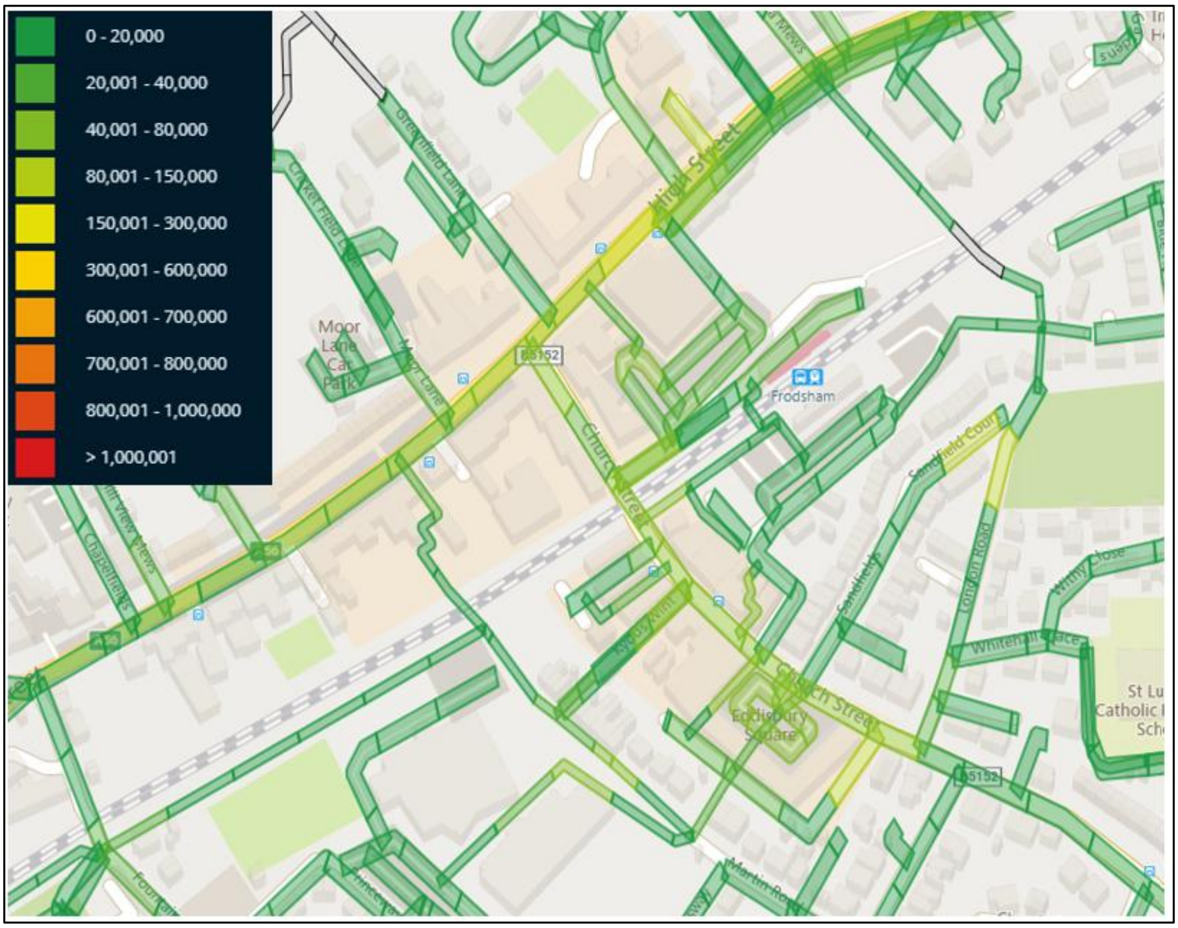
340. In terms of investment yields, retail as an asset class has seen a significant fall in value over the past decade. Transactional volumes in 2023 were subdued with high interest rates and global political uncertainties impacting on investor sentiment. Clearly, there are many factors that impact on town centre retail yields including lease length, tenant covenant and basis of rent review but in the broadest terms we would comment as follows:

- Prime high street yields – 6.75%
- Good secondary high street yields – 9%
- Secondary high street yields – 12%.

Pedestrian Flows

341. The figure below illustrates the pedestrian flows for Frodsham in the form of a heat map showing total pedestrian movements for November 2024. As can be seen, the largest concentration of footfall activity within the centre is principally associated with Main Street, and Church Street.

Figure 53: Frodsham Footfall Heat Map, November 2024

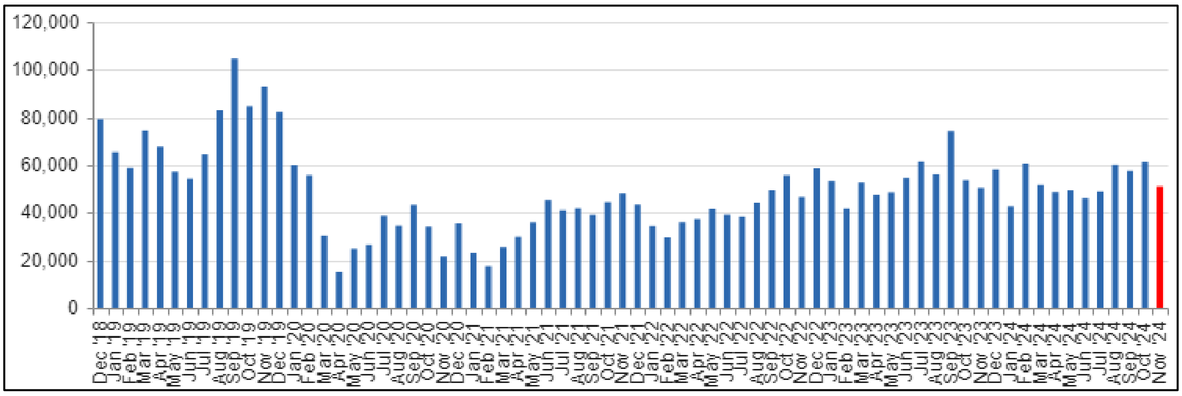


Source: MSCI

342. Given the concentration of activity on these two street, the junction of Main Street and Church Street was sampled to obtain information on how footfall levels have changed between December 2018 and November 2024.

343. As can be seen in the figure below pedestrian activity dropped in line with the heights of the pandemic-related restrictions on travel and movement between February 2020 – April 2021. Whilst figures have grown since, and the trend of the footfall count shows these to be stable footfall activity is less than pre-pandemic figures. The figures show that the peak footfall month for Frodsham over this period was September 2019 (100,000+). Figures since mid-2022 show that the footfall count is between 40,000 and 60,000 per month, with September 2023 being the anomaly at 75,000 counts.

Figure 54: Monthly Footfall Activity, December 2018 – November 2024, Main Street/ Church Street Junction



Source: MSCI

Accessibility

344. Frodsham is well connected by road, with the A56 cutting through from north east to south west and the B5152 to the south. The A56 can be followed north east to gain access onto the Weston Point / Rocksavage / Southern Express Ways and the wider road network including Junction 12 of the M56. The A56 can be followed south west to Helsby, and Junction 14 of the M56 and beyond. The B5152 leads south in the direction of Cuddington which allows for connection to be made north east on the A49 to Weaverham, and south west to Tarporley.

345. Frodsham town centre is well served by on-street car parking, either side of Main Street is lined with free car parking spaces. In addition to the on-street provision off-street parking is available at Eddisbury Square.

346. Bus services can be picked up within the centre with routes travelling through Frodsham as far as Chester Bus Interchange, Runcorn Halton Lea Shopping City and Halton Hospital.

347. Frodsham Train Station is located at the heart of centre which provides services to Manchester, Manchester Airport, Chester, Liverpool Lime Street Llandudno and beyond.

348. The provision of cycle infrastructure within Frodsham was noticeable with the provision of several Sheffield style cycle stands spread throughout. However, there was a noticeable absence of on-road cycle infrastructure within the centre.

349. The pedestrian environment of Frodsham is inviting, with wide pavements and island and traffic lighted crossing along Main Street and Church Street. Despite Main Street running through the heart of the centre, it feels like a safe pedestrian environment.

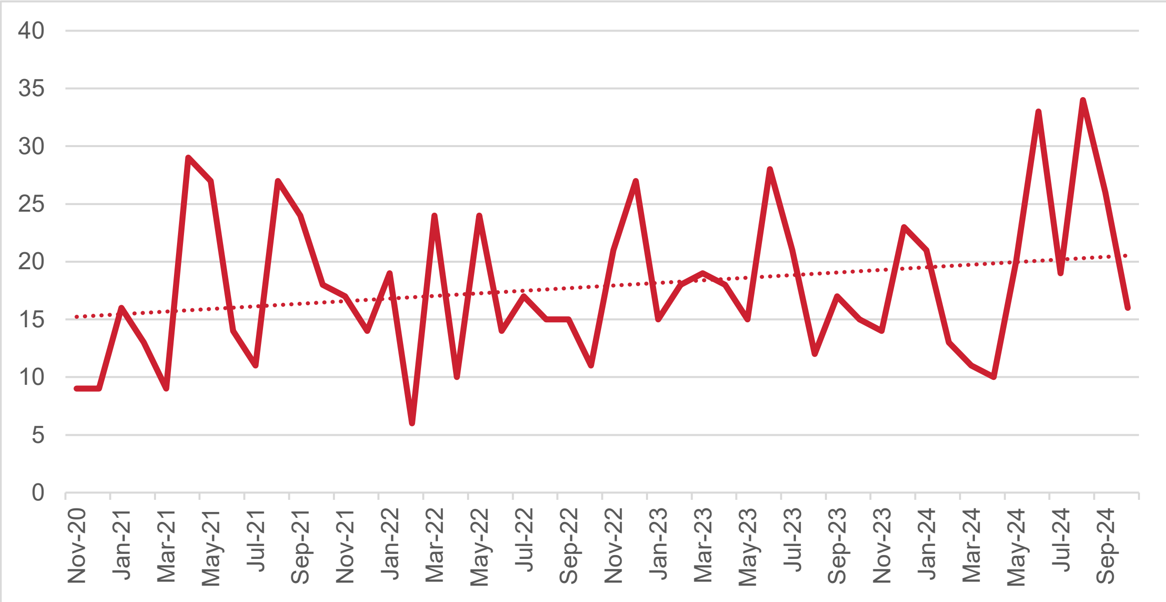
Crime and Safety

350. A central postcode within (WA6 7AR) was used to review total crime data within a ¼ mile radius between November 2020 and October 2024. The figure below outlines

the total crime rate month by month within this period, as well as a trendline to show the overall change in criminal activity over the four years.

351. As can be seen, recorded crime levels have increased over the period, with both June 2024, and August 2024 representing the peak period of recorded criminal activity with 33 and 34 crimes recorded, respectively.

Figure 55: Frodsham Recorded Crimes, November 2020 – October 2024



Source: UKCrimeStats

352. The figure below shows a heat map representing criminal activity within the same area and for the same period outlined previously. As can be seen, criminal activity is concentrated around Frodsham Sainsburys Local and Eddisbury Square. Further hotspots of criminal activity are shown around Morrisons Frodsham, and around a high street takeaway – Top Taste situated on Main Street.

353. The top three types of crimes recorded within this area during this period are anti-social behaviour (223 recorded incidences), shoplifting (100 recorded incidences) and public order offence (95 recorded incidences).

Figure 56: Frodsham Crime Heat Map, November 2020 – October 2024

Source: UKCrimeStats

Environmental Quality

354. Overall Frodsham has a welcoming environmental feel with modern and historic elements contributing to its distinct historical market town appeal. The centre is visually attractive which adds to its curb appeal and as a destination to spend time.

355. Throughout the town centre there is the noticeable inclusion of planting and greenery, street furniture including benches and decorative elements that enhance the quality and feel of the place.

356. Despite Main Street running through the heart of the centre, it does detract from the overall feel or quality of the town as a safe place for pedestrians. In part this is because of the setback nature of the wide footpaths along Main Street.

357. The environmental quality of Frodsham, in the most part, is not adversely impacted by vacant properties. Albeit the vacant Mojito's bar club does have a negative impact upon the corner of Main Street and Church Street.

358. On the whole Frodsham Town centre is pleasant and a welcoming with an attractive and functional environment quality for both residents and visitors.

Evening and Night Time Economy

359. A strong evening and night time economy can often be a good indicator of a strong, vital, and viable centre. A vibrant evening and night time economy is underpinned by a quality leisure offer within a centre, and so a sample of predominantly leisure outlets within Frodsham have been selected with their opening times and more importantly closing times recorded to get a sense of the provision of the evening offer.

Table 12: Leisure Operator Sample

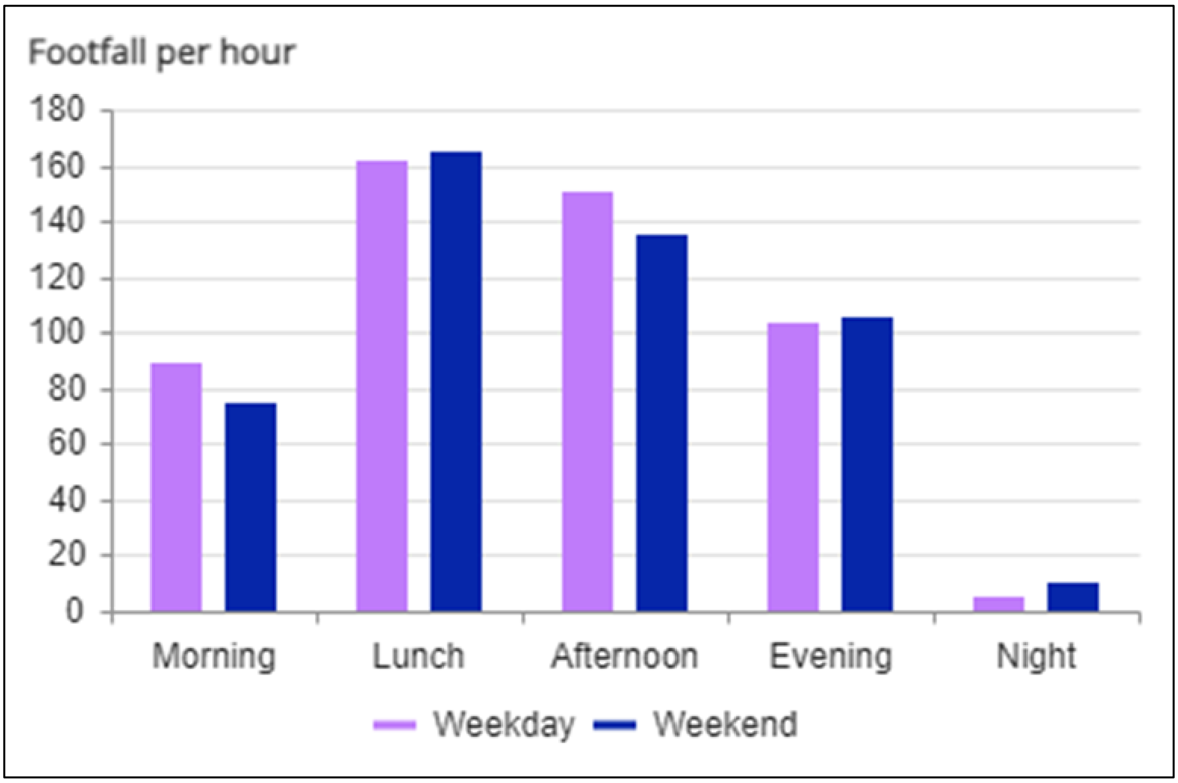
Name	Type	Open	Close
Helter Skelter	Bar	11am – 3pm	11pm
Indian Garden	Restaurant	5pm	11pm – 11:30pm
Bears Paw	Pub	9am – 12pm	10:30pm – 12pm
Queen's Head	Pub	9am – 10am	10pm – 12pm
Main Street Kitchen	Restaurant	10am	11pm
Lorenzo's Restaurant	Restaurant	10am	11pm

Source: LSH Research

360. The figure below shows how footfall levels differ across different parts of the day. As can be seen, footfall in an evening (5pm – 9pm) remains strong, with only a small decline between the afternoon and evening data.

361. The data indicates that the strong leisure, food, and beverage offer, and broader appeal of Frodsham town centre continues to attract a healthy proportion of visitors throughout the day and highlight that Frodsham is an attractive destination. This strength should continue to be built upon.

Figure 57: Evening Footfall, Church Street and Main Street (November 2024)



Source: MSCI

Conclusion

362. Overall, the Strengths, Weaknesses, Opportunities, Threats (SWOT) can be summarised as follows.

Strengths

- A broad mix of food & beverage outlets and operators that provides a diverse offering and ensures a strong evening footfall.
- Well located Morrisons supermarket and associated car park able to support linked trips throughout the centre.
- A below average vacancy rate.
- Ample convenient and accessible parking across the centre.
- Above average retail and financial & business service offering.
- Strong transport connections – bus and train.
- Good road access/ connectivity.

Weaknesses

- Under provision of comparison retail, convenience retail, and leisure services
- Rising levels of crime.
- Footfall hasn't recovered to pre-pandemic levels.

Opportunities

- New uses brought in to address vacancies (education, residential, healthcare etc.).
- Improvements to cycle accessibility (routes and parking).

Threats

- Rising crime levels to negatively impact perceptions of safety in the centre.
- Further high street retail closures leading to further vacancies.
- High/increasing business operating costs.

363. Frodsham's retail and leisure offer is relatively limited but is consistent with the market town status and serves the day-to-day needs of its catchment. The Morrisons superstore ensures that the centre makes an important contribution in meeting main food shopping needs.

364. Frodsham is a modestly scaled town centre and therefore elements of its retail and leisure offer are limited. However, the overall vibrancy of the centre is considered to be strong.