Southampton City Centre

Health Check

1999/2000

www.southampton.gov.uk

southampton city centre management

SOUTHAMPTON CITY COUNCIL

Contents

Introduction to the Health Check

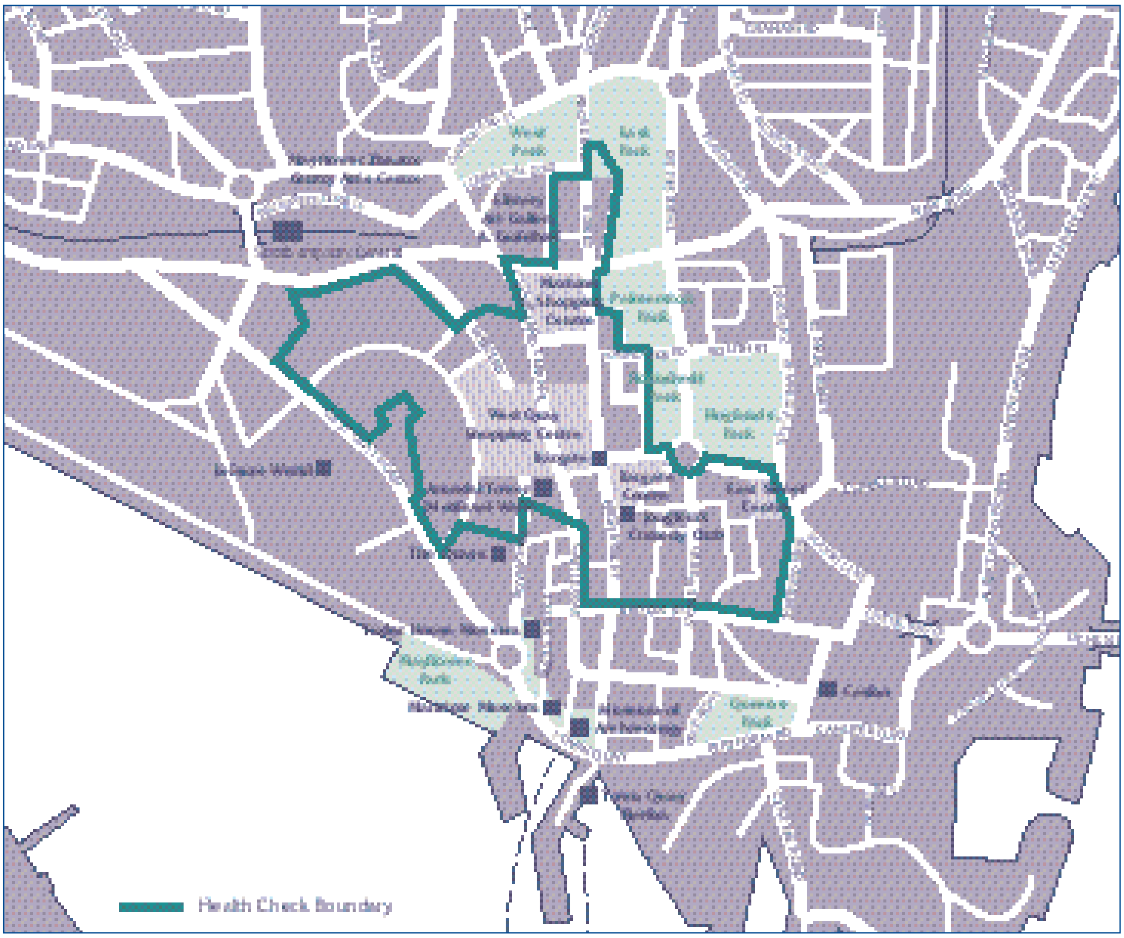
This document reports on the results of the third annual City Centre Health Check undertaken between April 1999 and March 2000.

The Health Check has been produced in line with Planning Policy Guidance (PPG6) which states that:
"In order to monitor the health of their town centres, local authorities should regularly collect information on key indicators."
The ultimate aim of the Health Check is to improve the vitality and viability of the city centre and as a key input into city centre management. Vitality and viability are measured using a range of key performance indicators. These measures provide baseline and time series information and are used to identify trends, areas requiring attention and to monitor the impact of major investment in the city centre such as the WestQuay development.

The indicators this year are similar to those used last year, although some modifications have been made in order to improve the usefulness and future comparability of the Health Check.

The Health Check is aimed at a wide audience and should be a helpful and relevant aid to retailers and businesses, investors, developers, the Chamber of Commerce and the City Council. It will inform the review of the City Local Plan, providing key information to help assess the effectiveness of current planning policies.

The Health Check indicates that the city centre is thriving and sets the scene for the increase in prosperity anticipated following the opening of WestQuay in autumn 2000 and various other developments taking place in 2000/2001.



2 Background information

Southampton is the regional centre for shopping, employment, entertainment, administration, general and specialised healthcare, higher education and religious worship for ethnic minorities.

Currently 215,000 people live in the city. However, as a regional centre, Southampton has a wider catchment population shown on the map below. Within a 20-minute drive there are 500,000 residents. 2 million people live within 45 minutes drive time. 43% of this population are within the high spending 16-44 age group (UK average = 42%), whilst 58% are white-collar residents (UK average = 56%). The catchment population also has a distinctly higher home ownership rate of 76% compared to the UK national average of 69% (Source: Hammerson plc, (1998) West Quay Research Data).

The city centre and the area close to the Health Check boundary are once again becoming a place for people to live. The following new housing developments are currently under construction. They are responding to the growing demand for housing and will have a major effect on the city centre.

Within the Health Check boundary:

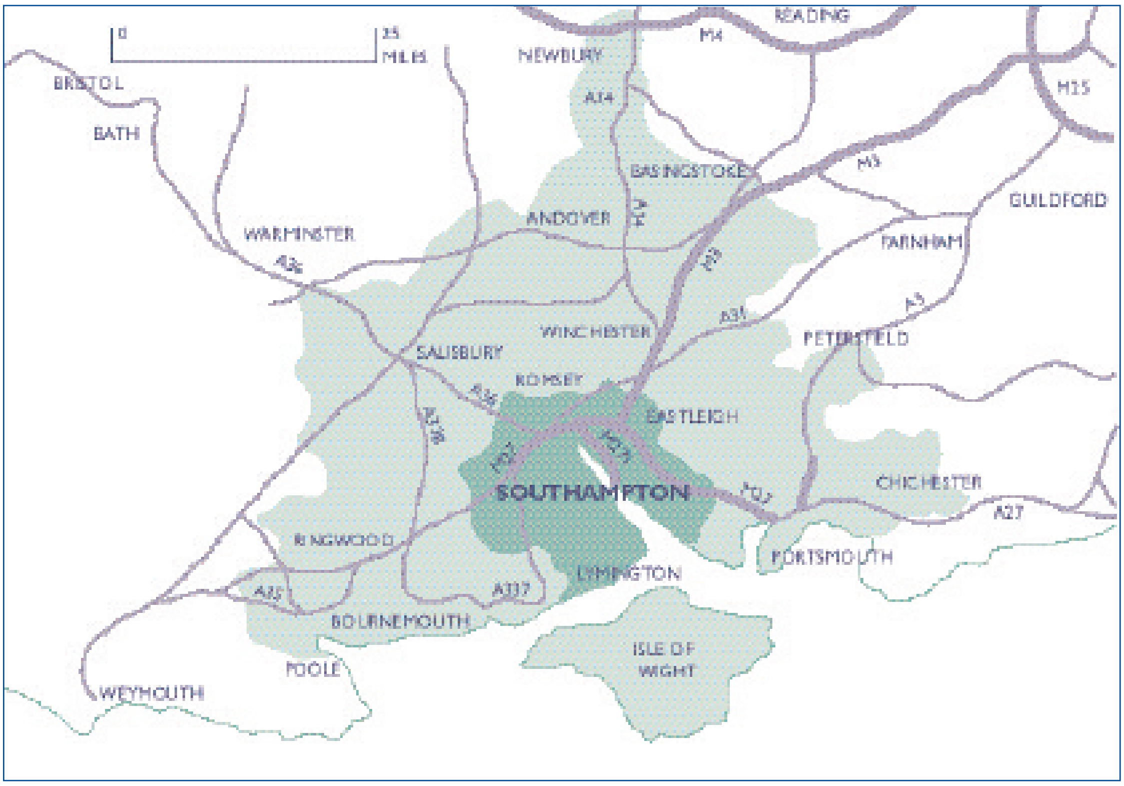
- 'Merchants Quarter' in the Old Town area is a redevelopment and conversion of a redundant warehouse site with 25 apartments.

Close to the Health Check boundary:

- 'Park View' development in the Polygon area is a redevelopment of the Polygon Hotel comprising 108 private apartments and 10 housing association dwellings in the form of 3 and 4 bedroom houses.

- 'Imperial Apartments' in Canute Road is a conversion of South Western House to provide 90 apartments with a new development of 18 flats proposed to the rear.

- 'Gloucester Square' in the Old Town area is a development of part vacant and part industrial land to provide 60 2-bedroom apartments in two blocks.



The city centre is also receiving major new retail investments, most notably the £295million WestQuay shopping centre with around 110,000 sqm floorspace. Construction continues on programme and the centre opens in autumn 2000. It is anticipated that at least 95% of the floorspace will be occupied on opening. It will have a major impact on the central shopping core and on the area included within the Health Check. Furthermore, the Above Bar pedestrian precinct is in the process of being refurbished at a cost of nearly £1million and will be completed for the opening of WestQuay shopping centre.

The attractiveness of the city centre is also being improved through the £4.5million enhancement programme for the grade-II-listed Central Parks, adjacent to the heart of the city centre. This upgrading of public open space for future generations will improve the environmental quality of the city centre.

Additionally, in June 1999, a £10million swimming and diving complex (The Quays) opened, increasing the variety of leisure facilities in the city centre.

3

Accessibility

Travelling to Southampton

Although Southampton has a coastal location, its city centre is highly accessible by both private and public transport.

Southampton is integrated into the regional and national **road network**. A dual carriageway connects the city centre with the M3 and M27 motorways, which provide rapid road links to many major cities including London. The M25 can be reached within an hour.

Southampton Central Railway Station, on the edge of the Health Check area, is the hub of the region's rail network, with frequent services operating from many destinations throughout the country, including direct daily services from Scotland. Further principal direct train services include London, Basingstoke, Bournemouth, Poole, Bath, Bristol, Cardiff and Gatwick Airport. A steady rise has been seen in the number of rail journeys either starting or ending at Southampton since 1996/97.

Passenger Journeys on Southwest Trains to and from Southampton Central Railway Station

1996/97	1997/98	1998/99	1999/2000
3,012,000	3,234,000 +7.4%	3,411,000 +5.5%	3,691,000 +8.2%

Source: Southwest Trains

The recently built **National Express Coach Station** links Southampton into the national coach network with direct services to London, Bournemouth and Portsmouth every second hour. Moreover, regional bus operators provide frequent services to various destinations within the South of England.

The modern **Southampton International Airport**, which is served by frequent trains (Waterloo-Southampton) and is close to the M27, provides the city with scheduled flights to over 20 destinations including Brussels, Frankfurt, Paris and Amsterdam, along with major UK destinations. The number of passengers handled by the airport has continued to grow during 1999/2000 building on increases in previous years.

Passengers at Southampton International Airport

1996/97	997/98	998/99	1999/2000
559,000 +12.7%	630,000 +19.7%	754,000 +2.8%	775,000

Source: Southampton International Airport

The number of ferry crossings between Southampton and the Isle of Wight are shown on the following table. The figures show a consistent increase in passengers and vehicles. Vehicle ferries and high-speed catamaran link Cowes every 30 minutes with **Town Quay** and the city centre.

Passengers and Vehicles on Red Funnel Crossings

	1996	1997	1998	1999
Passengers	2,133,000	2,272,000 +6.5	2,364,000 +4.0	2,525,000 +6.8
Vehicles	378,000	413,000 +9.3	433,000 +4.8	471,000 +8.8

Source: Red Funnel Group

There are also passenger ferries across Southampton Water to Hythe and the New Forest every half an hour. This service carries an estimated 450,000 passengers per year.

Travel within Southampton

Southampton is well served by public transport. The main **bus network** is provided by two operators, First Southampton, mainly serving the city area, and Solent Blue Line which serves the city and surrounding districts. Wilts and Dorset, First Provincial and Stagecoach Hampshire provide additional regional connections. Key interchanges are situated just off the central pedestrian precinct. Up to 40 different bus routes run through Above Bar Street. During the week most services operate every 30 minutes or more frequently. Annually there are around 20 million bus passenger trips throughout Southampton (including all bus companies).

Southampton's fleet of low-floor buses is steadily increasing. In January 2000 First Southampton bus company had 31 and Solent Blue Line 22 in use. Each vehicle provides one wheelchair space. First Southampton also runs one of the country's largest fleet of buses powered by natural gas (16 buses), producing less pollution and noise than their diesel counterparts.

There is restricted access for private vehicles to Southampton's main **pedestrianised shopping precinct** and the adjacent pedestrian priority area to the north. Traffic flow has been disrupted to some extent by work associated with WestQuay shopping centre, but this is being managed to minimise inconvenience, with traffic management aided by the **"ROMANSE" Traffic Information Network System** highlighting current traffic issues on variable message signs around the city centre.

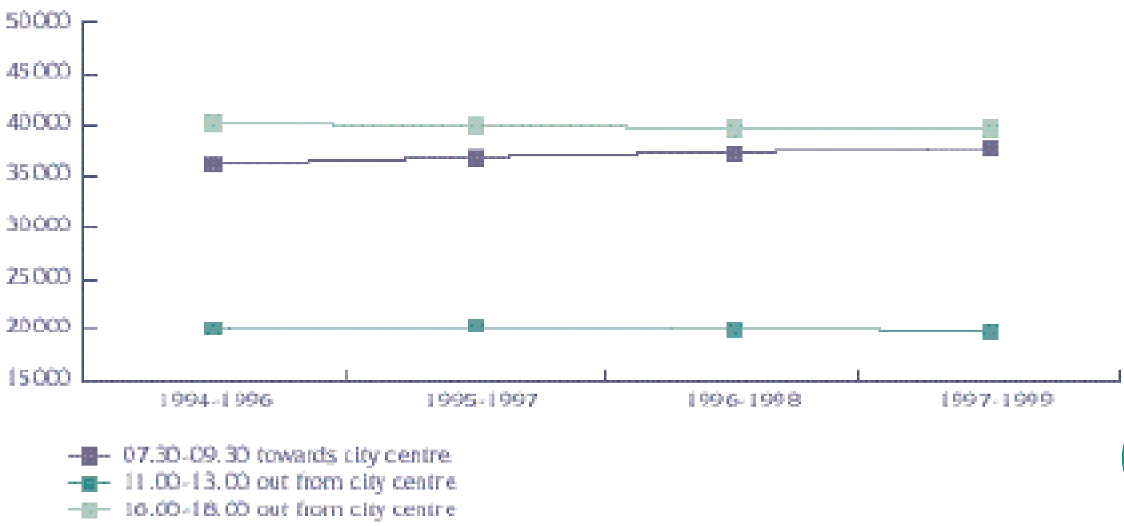
Taxis are widely available. Principal ranks can be found at key strategic points, including five within the Health Check boundary (see Transport Map on p 11).

Cycling in the city centre is encouraged through a network of cycle lanes. The cycle parking facilities are well positioned throughout the city centre. The predominant form is 'Sheffield' style racks. In recent years the number of racks has risen considerably and now stands at 138 within the Health Check area. The city's Cycling Plan, issued in June 2000, seeks further improvements for cyclists.

Transport Flows and Modal Split

Transport flow information can also be used to provide an indication of the number of people (not vehicles) entering and leaving Southampton city centre. Surveys have been conducted regularly over past years. As the traffic counts are carried out on only one day each year, the data shown on the transport-flow graph is based on three-year running averages.

Total traffic flows into and out of Southampton city centre



The graph indicates that traffic flow approximately doubles during peak hours compared to off-peak periods. The number of people entering the city in the morning peak has risen by 4% over the period shown.

The modal-split tables analyse the transport-flow figures with regard to the method of transport used.

Movement into the city centre 07.30-09.30 split by mode of transport

	1994-96	1995-97	1996-98	1997-99
Private				
Light vehicle	22,045 (61%)	22,288 (60.5%)	22,537 (60.4%)	23,251 (61.7%)
Motor cycle	302 (0.8%)	278 (0.8%)	273 (0.7%)	289 (0.8%)
Pedal cycle	596 (1.6%)	576 (1.6%)	594 (1.6%)	615 (1.6%)
Total	**22,943 (63.4%)**	**23,142 (62.8%)**	**23,405 (62.7%)**	**24,155 (64%)**
Public				
Bus	7,422 (20.6%)	7,874 (21.4%)	7,812 (20.9%)	7,539 (20%)
Rail	1,327 (3.7%)	1,435 (3.9%)	1,626 (4.4%)	1,639 (4.3%)
Ferry	599 (1.7%)	597 (1.6%)	592 (1.6%)	628 (1.7%)
Pedestrian	3,856 (10.7%)	3,778 (10.3%)	3,872 (10.4%)	3,753 (10%)
Total	**13,224 (36.2%)**	**13,684 (37.2%)**	**13,902 (37.3%)**	**13,559 (36%)**

Movement out of the city centre 11.00-13.00 split by mode of transport

	1994-96	1995-97	1996-98	1997-99
Private				
Light vehicle	11,497 (57%)	11,763 (57.8%)	11,748 (58.4%)	11,855 (59.9%)
Motor cycle	114 (0.6%)	113 (0.6%)	109 (0.5%)	100 (0.5%)
Pedal cycle	242 (1.2%)	251 (1.2%)	377 (1.9%)	366 (1.8%)
Total	**11,853 (58.8%)**	**12,127 (59.5%)**	**12,234 (60.9%)**	**12,321 (62.3%)**
Public				
Bus	3,664 (18.2%)	2,659 (18%)	3,514 (17.5%)	3,386 (17.1%)
Rail	513 (2.5%)	547 (2.7%)	589 (2.9%)	529 (2.7%)
Ferry	179 (0.9%)	158 (0.8%)	164 (0.8%)	160 (0.8%)
Pedestrian	3,946 (19.6%)	3,877 (19%)	3,603 (17.9%)	3,389 (17.1%)
Total	**8,302 (41.2%)**	**8,241 (40.5%)**	**7,870 (39.1%)**	**7,464 (37.7%)**

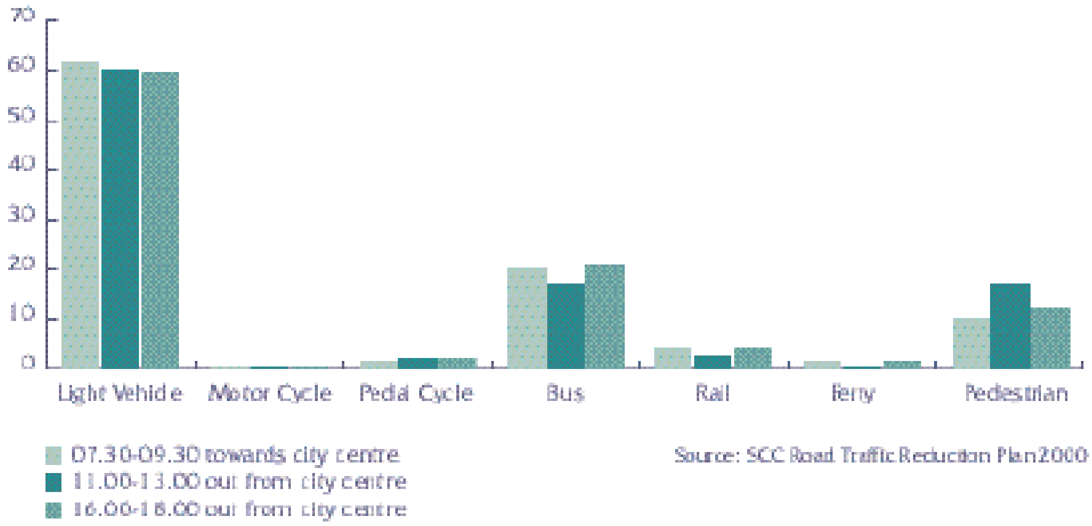
Movement out of the city centre 16.00-18.00 split by mode of transport

	1994-96	1995-97	1996-98	1997-99
Private				
Light vehicle	23,512 (58.6%)	23,312 (58.4%)	22,961 (57.9%)	23,343 (58.8%)
Motor cycle	333 (0.8%)	329 (0.8%)	310 (0.8%)	325 (0.8%)
Pedal cycle	685 (1.7%)	646 (1.6%)	798 (2%)	834 (2.1%)
Total	**24,530 (61.2%)**	**24,296 (60.8%)**	**24,069 (60.7%)**	**24,502 (61.7%)**
Public				
Bus	8,569 (21.4%)	8,480 (21.2%)	8,469 (21.3%)	8,187 (20.6%)
Rail	1,423 (3.5%)	1,545 (3.9%)	1,695 (4.3%)	1,662 (4.2%)
Ferry	586 (1.5%)	591 (1.5%)	589 (1.5%)	6168 (1.6%)
Pedestrian	5,004 (12.5%)	5,040 (12.6%)	4,861 (12.2%)	4,757 (12%)
Total	**15,582 (38.8%)**	**15,656 (39.2%)**	**15,614 (39.3%)**	**15,222 (38.3%)**

The private car, with a 60% share, plays the major role in Southampton's traffic flows followed by the bus with a share of around 20%. The split between the different modes of transport shows only minor changes since 1994.

The following graph highlights the use of different modes for travelling into and out of Southampton city centre during certain periods of the day.

Split in movement over time into and out of city centre, 1996-1999



Source: SCC Road Traffic Reduction Plan 2000

Pedestrian figures vary more significantly than those of other modes.

Pedestrian Movement within the City Centre

A survey of pedestrian movement within the city centre has been conducted regularly over past years.

Pedestrian Movement within the City Centre

Survey Point (average flow per hour)	Weekday - Summer 1999 and difference to previous year	Saturday - Summer 1999 and difference to previous year
Northern Above Bar Street	1,528 (-274)	2,890 (-331)
Above Bar Street	2,054 (-296)	3,089 (-986)
Above Bar Precinct	3,032 (-1181)	9,035 (+792)
Bargate	3,304 (-85)	6,393 (-761)
East Street	1,446 (-67)	2,741 (+153)
Portland Terrace (ASDA)	1,840 (-15)	2,971 (-413)

Source: SCC City Centre Pedestrian Survey

The highest counts were recorded in Above Bar pedestrian precinct and in the Bargate area. Once WestQuay shopping centre opens in autumn 2000, and shops such as Tyrrell & Green relocate, the pattern of pedestrian movement is expected to change.

The map on the following page shows how the average hourly count at each of the six locations on a comparable Saturday has changed over the four years from 1996 to 1999.

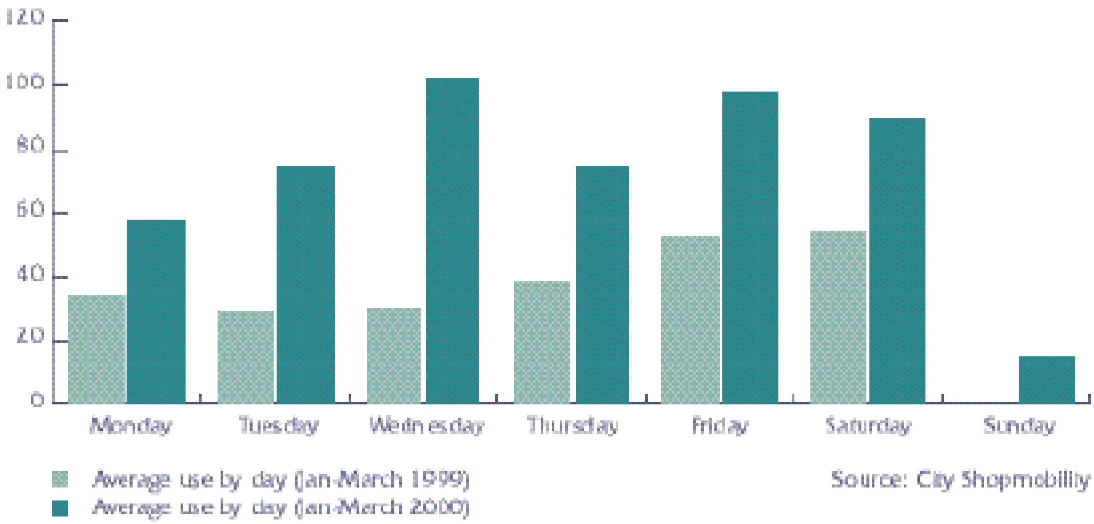
Relative changes in pedestrian flow 1997-1999

Hardly any long term trend can be observed. As the surveys are carried out on a single day, variation in figures could be affected by a number of variables, including adverse weather conditions or events within or outside the city centre.

Accessibility for Disabled People

In order to improve the access for disabled people in the city centre the Southampton Shopmobility scheme, with nine dedicated parking spaces, was introduced in December 1998. It provides powered wheelchairs/scooters and manual wheelchairs, allowing both permanently and temporarily disabled people to shop and carry out their business independently. As the service has become more widely known, the daily use has increased significantly.

Daily use of Shopmobility throughout January - March 1999 and 2000



The addition of a shopping companion service in December 1999 has enhanced the Shopmobility scheme allowing visually impaired people to further enjoy the benefits of the city centre. The WestQuay shopping centre will also provide a Shopmobility service when it opens in autumn 2000.

Accessibility in the areas of the city centre is also aided by the provision of tactile crossings for people with visual impairments. A programme of raising bus kerbs has been introduced to give better access to the new low-floor buses.

Feedback Panel Survey

The ease of travelling into and around Southampton was rated as the second aspect of life most in need of improvement by the Fourth Southampton Feedback Panel Survey 1999, having risen from the third place in 1997. This could in part be due to short-term disruption caused by the WestQuay shopping centre development and road improvement schemes.

4 Car parking

Car Park Availability (managed by Southampton City Council unless otherwise indicated)

The multi-storey and surface car parks within the Health Check boundary and nearby that serve the city centre are:

Transport Map Ref.	Car Parks		Number of Spaces 2000	1998/99	1997	Short/long stay
	MULTI STOREY CAR PARKS					
1	Bargate Centre (private)		220	220	220	Short
2	NCP Portland Terrace (private)		605	605	605	Long
3	Marlands		810	810	810	Long
4	Eastgate Street		713	713	713	Long
5	Grosvenor Square		540	540	540	Long
6	West Park	weekends	510	510	510	Long
		weekdays	200	200	200	Long
	Arundel Towers		-	-	601	Long
	TOTAL (weekend)		**3398**	**3398**	**3999**	
	SURFACE CAR PARKS					
7	West Quay Retail Park (private)		693	693	693	Short
8	Civic Centre f/court (w/ends only)		71	71	71	Short
9	Castle Way		68	68	68	Short
10	Guildhall (w/ends only)		66	66	66	Short
11	Albion Place		52	52	52	Short
	Portland Street		-	-	39	Short
12	Guildhall		26	26	26	Short
13	Bargate Street		9*	9*	29	Short
14	The Quays (North)		140	-	-	Short
15	The Quays (South)		90	-	-	Long
16	Harbour Parade		56	-	-	Long
17	Lime Street		226	226	226	Long
18	Charlotte Place		224	224	224	Long
19	West Bay		175	175	175	Long
20	Toys ‘R’ Us (private)		153	153	153	Short
21	Gloucester Square		100	100	100	Long
22	Grosvenor Square (North)		91	91	91	Long
23	NCP Back of the Walls (private)		76	76	76	Long
	Western Esplanade (south)		-	-	150	Long
	TOTAL (weekend)		**2316**	**2030**	**2239**	
	ALL CAR PARKS (weekend)		**5714**	**5428**	**7038****	
	ON STREET CAR PARKING		**513**	**513**	**563**	
	TOTAL CAR PARKING		**6227**	**5941**	**7601****	

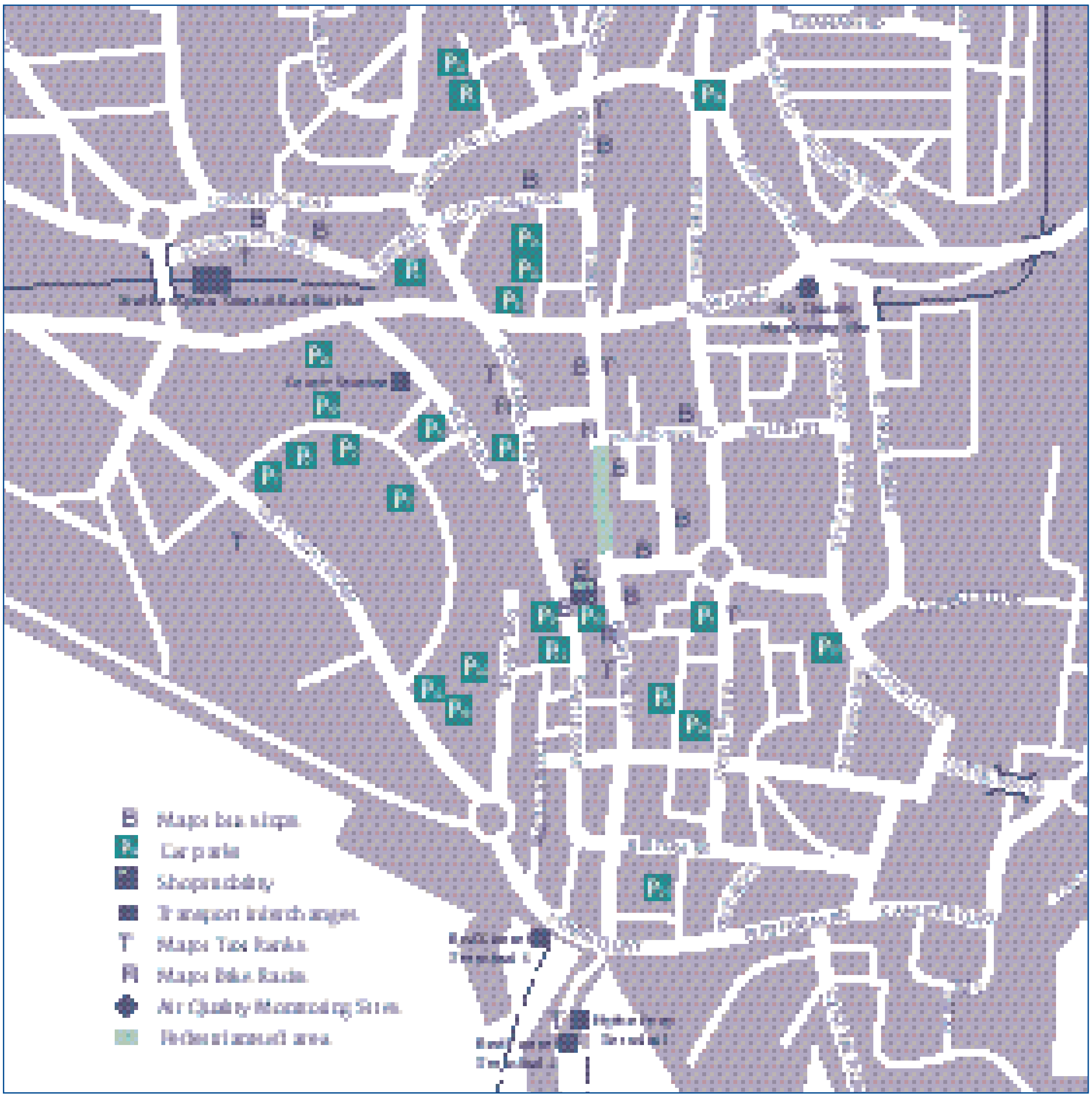
* Shopmobility users only
** incl. 800 temporary (rough ground) spaces used at Christmas

Source: Southampton City Centre Management

The location of the parking facilities are illustrated on the following Transport Map, on which also various other previously mentioned transport facilities are highlighted.

Since 1997 the number of available spaces within and adjacent to the Health Check boundary has decreased. The closure of the Arundel Towers, Portland Street and Western Esplanade car parks as well as the loss of 20 spaces at Bargate Street led to a decrease of available parking spaces. The opening of The Quays and Harbour Parade car parks later in 1999 replaced some spaces. Taking the 513 short-term on-street parking facilities into account, there are now approximately 6227 spaces. With the opening of the WestQuay shopping centre in autumn 2000 the number of parking spaces within the city centre will rise by 4000.

The short stay car parks are important ‘shopper’ car parks. Tickets can be purchased for a maximum of two hours at 60p per hour. These prices have remained steady since 1997/98. Prices for long stay car parks range from 50p per hour up to £4.20 for over seven hours (over five hours in more central sites).

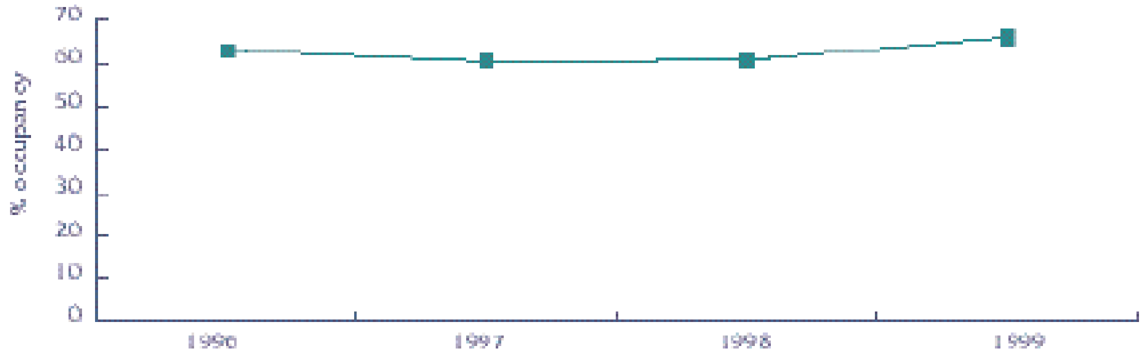


Car Park Occupancy

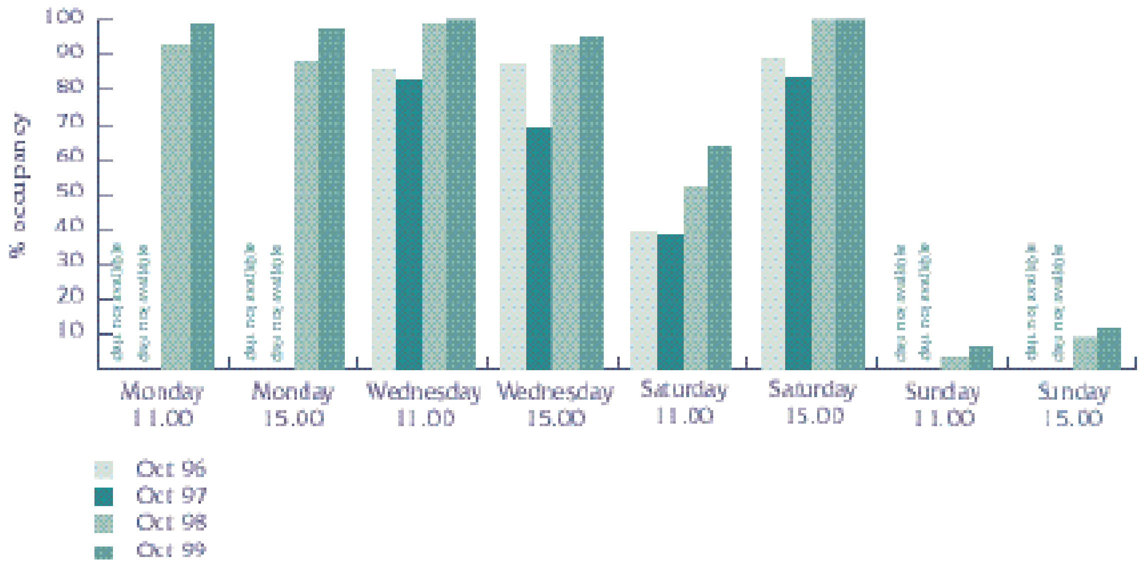
The level of occupancy in four City Council run multi-story car parks (Grosvenor Square, Marlands, West Park and Eastgate Street) has been monitored over past years.

As the Grosvenor Square car park is primarily used by office workers, it shows the highest occupancy throughout the week with figures below the average on Saturday mornings and Sundays. The West Park car park shows similar characteristics but more variable usage figures. Eastgate Street car park has characteristics of a shopper car park with high weekend occupancy. Marlands, also a shopper car park, has the highest Sunday figures. Weekday use is reduced partly due to around 700 free parking spaces, (maximum 2 hour stay) in the West Quay Retail Park car park nearby.

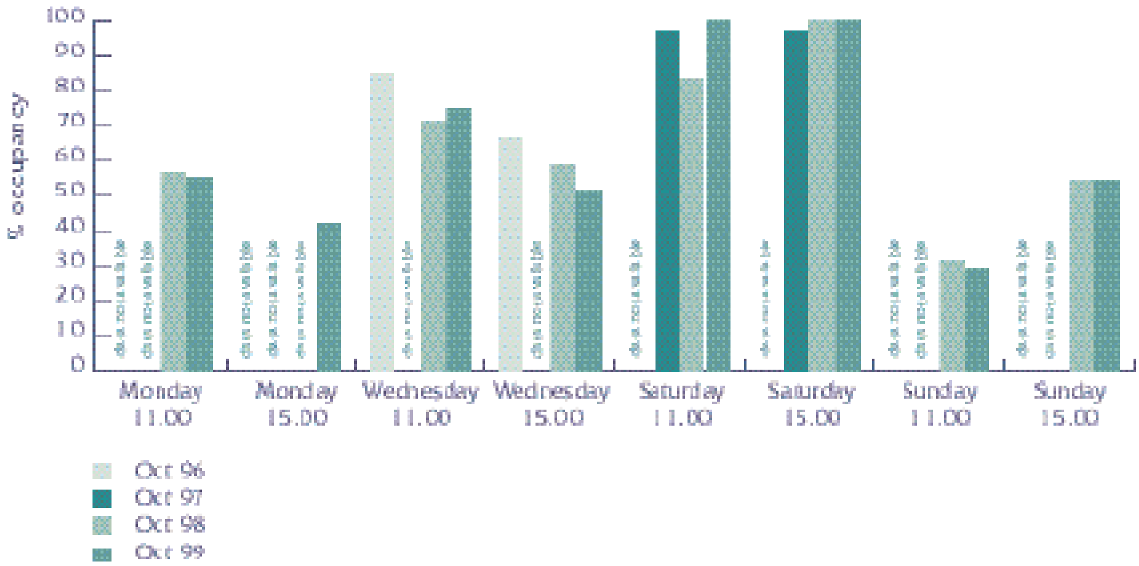
Average use for all four surveyed car parks



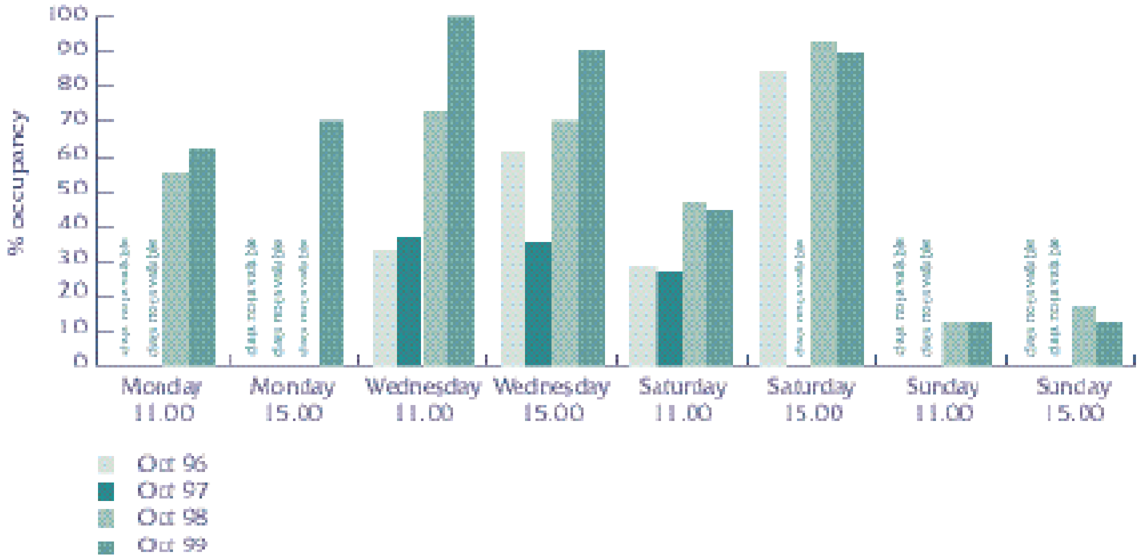
Grosvenor Square car park usage (540 spaces)



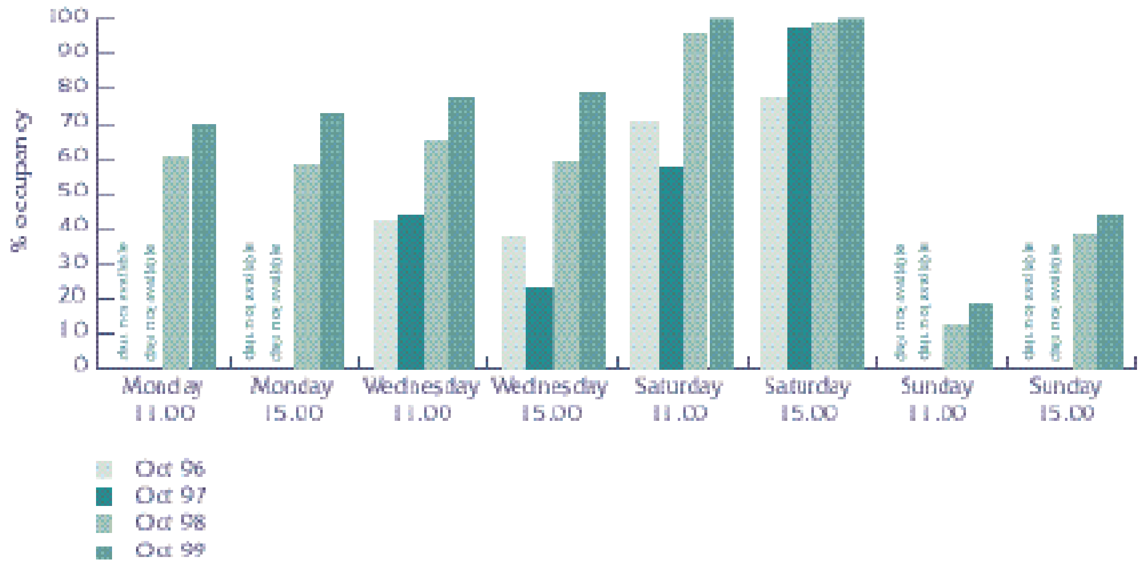
Marlands car park usage (810 spaces)



West Park car park usage (200 spaces on weekdays, 510 on weekends)



Eastgate car park usage (540 spaces)



Source: ROMANSE Database

Parking for Disabled People

With the exception of barrier controlled car parks, disabled people can park free in all Southampton City Council car parks and at a number of on-street parking bays provided the vehicle clearly displays a valid orange or blue badge. Bargate Street car park is specifically for users of the Shopmobility scheme (not necessarily orange badge holders).

Diversity of use

As a measure of vitality and viability in the city centre, 'diversity of use' provides some indication of the mix of activity that exists in the city centre. A wide variety and mix of uses provides a busy environment, often at different times throughout the day.

City Centre Land-Uses

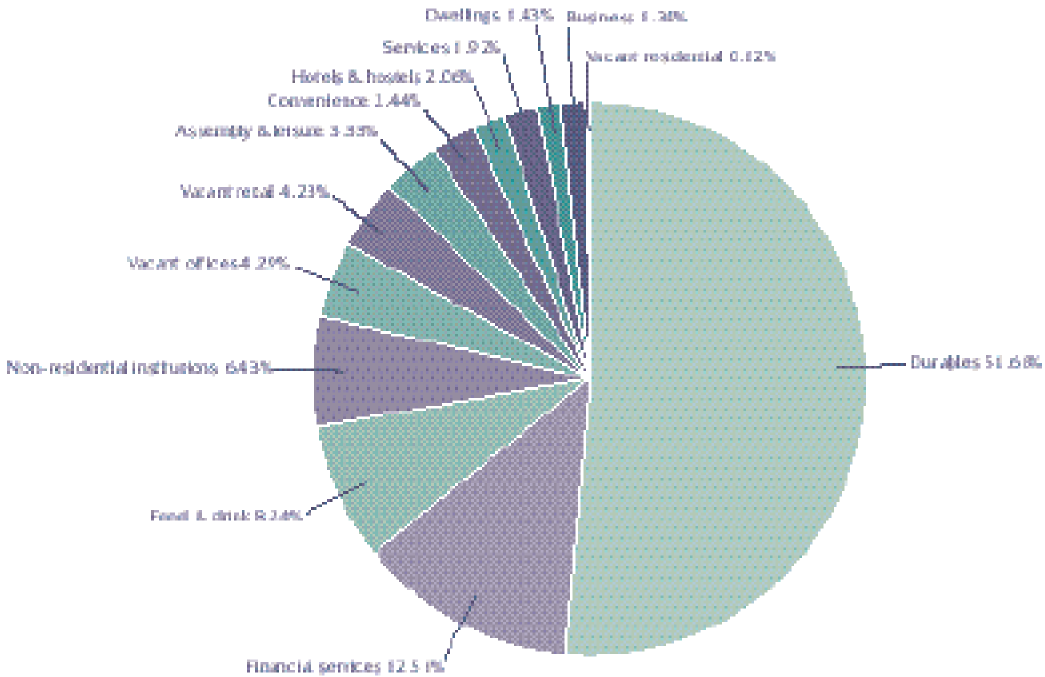
Use		Units 1999	Sq metres 1999	% of total sq m 1999	% Change in sq m on 1998	% Change in sq m from 1997 to 1998
A1*	Convenience	18	8,559	2.44	- 2.86	- 11.2
	Durables	267	180,882	51.66	- 1.72	+ 2
	Services	30	6,706	1.92	- 0.04	+ 1
A2	Financial Services (counter services)	93	43,809	12.51	- 1.99	- 1.5
A3	Food & drink	62	28,840	8.24	+ 1.47	+ 15.6
B1	Business	3	4,708	1.34	0	0
C1	Hotels and hostels	2	7,200	2.06	0	0
C3	Dwellings	58	4,995	1.43	0	+ 354.1
D1	Non-residential institutions (inc. Education)	16	22,526	6.43	+ 0.04	+ 1.7
D2	Assembly and leisure (inc. cinemas, theatres)	8	11,676	3.33	- 0.92	+ 537
Vacant offices		38	15,027	4.29	- 33.65	- 37.1
Vacant residential		1	410	0.12	0	0
Vacant retail		46	14,800	4.23	- 0.16	- 12.6
TOTAL		**642**	**350,138**	**100**		

*Definitions: The retail use is divided into:
Convenience - Retail outlets primarily selling perishable goods bought on a regular basis e.g.: supermarkets, newsagents, bakers.
Durables - Retail outlets primarily selling goods with a longer life span e.g.: clothing, houseware, furniture.
Services - Retail outlets primarily offering a service e.g.: travel agents, hairdressers.

Source: SCC City Centre Retail Database

Retail as a whole, including convenience, durables and services, accounts for 55% of the total floorspace. The city centre is dominated by durable goods shopping, accounting for nearly 42 % of business units and over 50 % of floorspace. Although there has been little significant change over the past year within the retail sector overall, this picture will change dramatically once the WestQuay shopping centre opens in autumn 2000 with more than 77,000 sqm. of floor space.

Percentage share of total floor space



At present the retail core is concentrated on Above Bar Street, East Street and High Street. The slight drop in retail space in 1999 is due to changes to offices and 'food & drink' uses. The reason for the considerable loss of floorspace for convenience shopping in 1998 was mainly the closure of Safeway in Queensway.

Financial Services also have an important role in the city centre accounting for 12% of total floor space. In spite of slight decreases this share remains quite stable.

The importance of **'food & drink'** establishments (8% of total) is highlighted with a 16% increase in floorspace in 1998 and a further 1% increase in 1999 (opening of a restaurant, a public house and a take-away). The WestQuay shopping centre will lead to a further increase with at least eight new restaurants and seven kiosks within its 'Food Terrace'.

Although **residential dwellings** only represent a share of less than 1.5%, there was a significant rise in the city centre in 1998. 55 new units have been built within the Health Check area. Currently, several new housing developments are under construction within and on the edge of the Health Check area, accounting for more than 300 new dwellings.

Vacant Property

There has been a drop in vacant floorspace, with its share having fallen by more than 4% in 1998 and another 2% in 1999. As a result, the amount of vacant floorspace has fallen to 8%, which is 1% below the average figure for the UK.

Main Areas with Vacant Units	1999	1998
Bargate Centre	13	18
High Street	11	10
East Street Centre	10	8
Above Bar Street	7	8
East Street	1	6

Source: SCC City Centre Retail Database

In the Bargate Centre and on East Street the number of vacant units has dropped considerably. There were also major changes in Above Bar Street (11 to 8) and East Street Centre (16 to 8) in 1998. On Above Bar Street the positive trend continued. Remaining vacancies are mostly concentrated at its northern end. However, the Government's Planning Policy Guidance Note acknowledges that vacant units can arise even in the strongest town centres.

Retail performance

General Performance

From a league table of 1,400 town centres in Great Britain, produced by Experian Ltd, Southampton is ranked as 38th in 1999/2000. The rankings are based upon a number of key performance indicators including vacancies, size, number of comparison retailers, major multiples and independent outlets. Southampton's position compared to some of its competitors is shown below.

Experian City Centre Ranking - Selected Cities

	1999/2000	1998/99	1997/98
Kingston upon Thames	11	14	17
Bristol	15	11	5
Guildford	16	17	28
Brighton	29	32	43
Southampton	38	45	36
Portsmouth	84	85	31
Bournemouth	122	131	95
Winchester	139	161	180
Basingstoke	159	100	98

Source: Experian Ltd

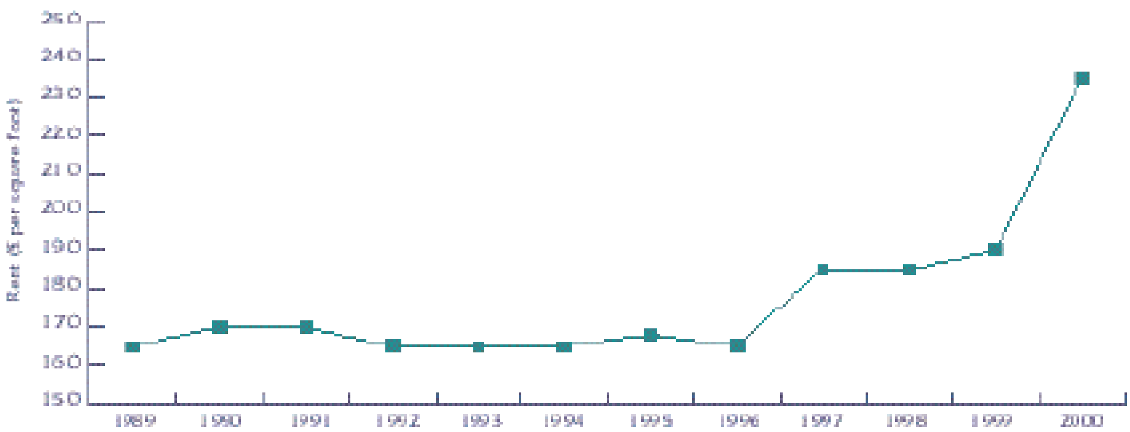
Southampton gained 7 places in 1999/2000. After the opening of WestQuay its ranking is expected to rise into the Top 12 (Source: Estates Gazette, 04/00, p. 80). Currently, Kingston, Bristol, Guildford and Brighton are ranked higher. Whilst Brighton has gained 14 places over the last two years, the ranking of Bristol is dropping. The nearby centres of Portsmouth, Bournemouth, Winchester and Basingstoke are ranked significantly lower than Southampton.

Retail Rents

The analysis of zone A (prime frontage) shopping rents is an important indication of the strength and competitiveness of the commercial property market.

The retail rents graph shows the changes in Zone A rents for a hypothetical standard retail shop unit in the prime pitch in Southampton city centre.

Zone A retail rents 1989-1999

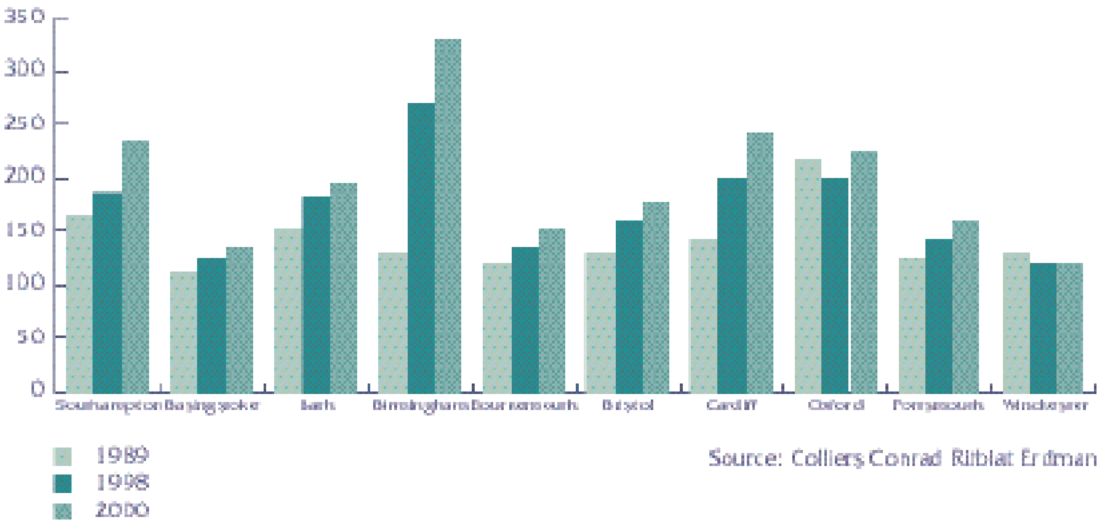


Source: Colliers Conrad Ritblat Erdman

Whilst Southampton's figures remained fairly constant throughout the early to mid 1990s, they have risen sharply between 1996 and 1997. Since 1999 values have risen even more significantly. This is probably due to rents being paid in and around the site of the new WestQuay shopping centre. However, in the nearby Marlands Shopping Centre, rents are much lower at £80 per sq. ft. In the Bargate Centre typical rents are around £30 per sq. ft. (Source: Estates Gazette, 04/00, p. 81).

Rental figures for nine other centres have been monitored since 1989.

Zone A retail rents 1989, 1998 and 2000



Over this time Southampton's rents:
- have grown to be higher than in Bath and Oxford.
- have been similar to those in Cardiff
- have risen by 30%, only exceeded by Birmingham and Cardiff

Over the last two years Southampton city centre rents have increased at a greater rate (27%) than in any of the comparison centres.

City Centre Investment

Examples of City Centre Investment

	1997/ 1998	Examples	1998/ 1999	Examples	1999/ 2000	Examples
New businesses	40	Chicago Rock Cafe	25	Bar Risa, Jongleurs	16	STA Travel, Tiddly Oggies
New premises	13	SPM Jewellers	8	Lloyds/TSB	4	Argos, BT Phone Shop
Refurbishment	13	Britannia Building Society	8	Boots the Chemists	6	WHSmith, River Island
Total	**66**		**41**		**26**	

Source: Southampton City Centre Management

Since 1997 over 130 premises in the city centre have been the subject of considerable capital investment. Recently, investment activities have slowed down but are expected to rise again after the opening of WestQuay shopping centre.

Retail Sales Trends

The retail sales trends of six multiple retailers in the city centre are collected monthly and analysed on an annual basis.

The data is expected to be particularly useful in assessing the impact of the opening of WestQuay shopping centre in autumn 2000 on retail sales in the city centre.

The participating retailers (Boots The Chemists, Debenhams, Marks & Spencer, Top Shop/Top Man, Tyrrell & Green (John Lewis Partnership) and W H Smith) provide figures which indicate the percentage increase or decrease in sales for that month against the same month in the previous year. The figures have been amalgamated for analysis and to retain confidentiality.

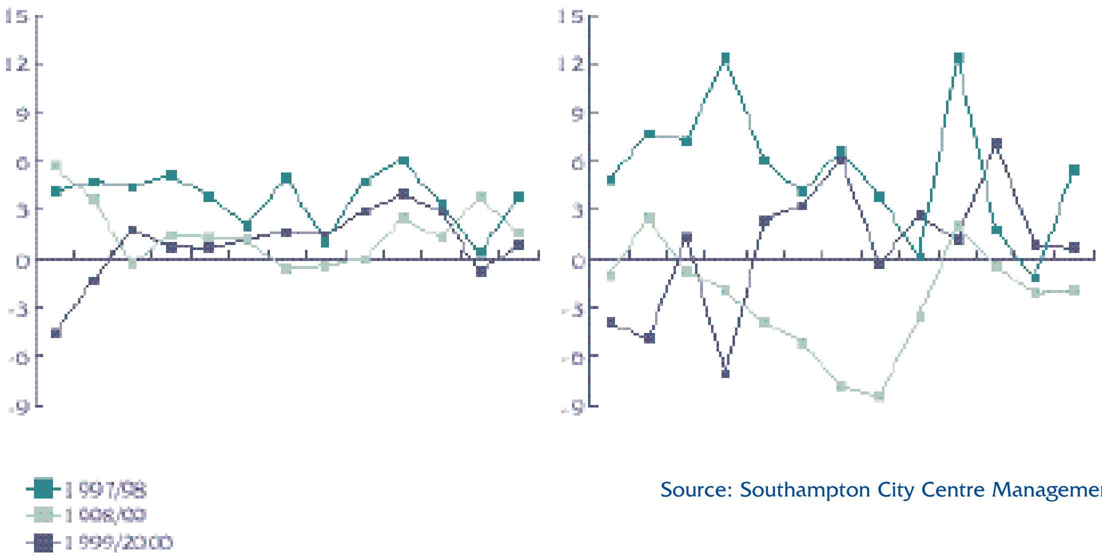
Comparison is also made with British Retail Consortium (BRC) figures for the same period. BRC figures are based on responses from retailers accounting for about half of the total UK retail sales on a 'like for like' basis (removing the effect of retail floorspace expansion).

Average retail sales trends

Average of monthly development of sales within the financial year compared to the same month in the previous year

British Retail Consortium Like for Like Basis

Southampton



Source: Southampton City Centre Management

In 1997/98 retail sales grew strongly as a result of Building Society windfalls. In 1998/99 nationally sales growth was less, but Southampton experienced a fall in sales. Over the last year sales in Southampton have recovered slightly showing growth of 0.7%, which is similar to the national trend for 1999/2000. Southampton's figures are in part based on retailers who nationally have not performed well, such as Marks & Spencer. Much of the national growth has been in chains such as Gap or Next, not included in Southampton's figures.

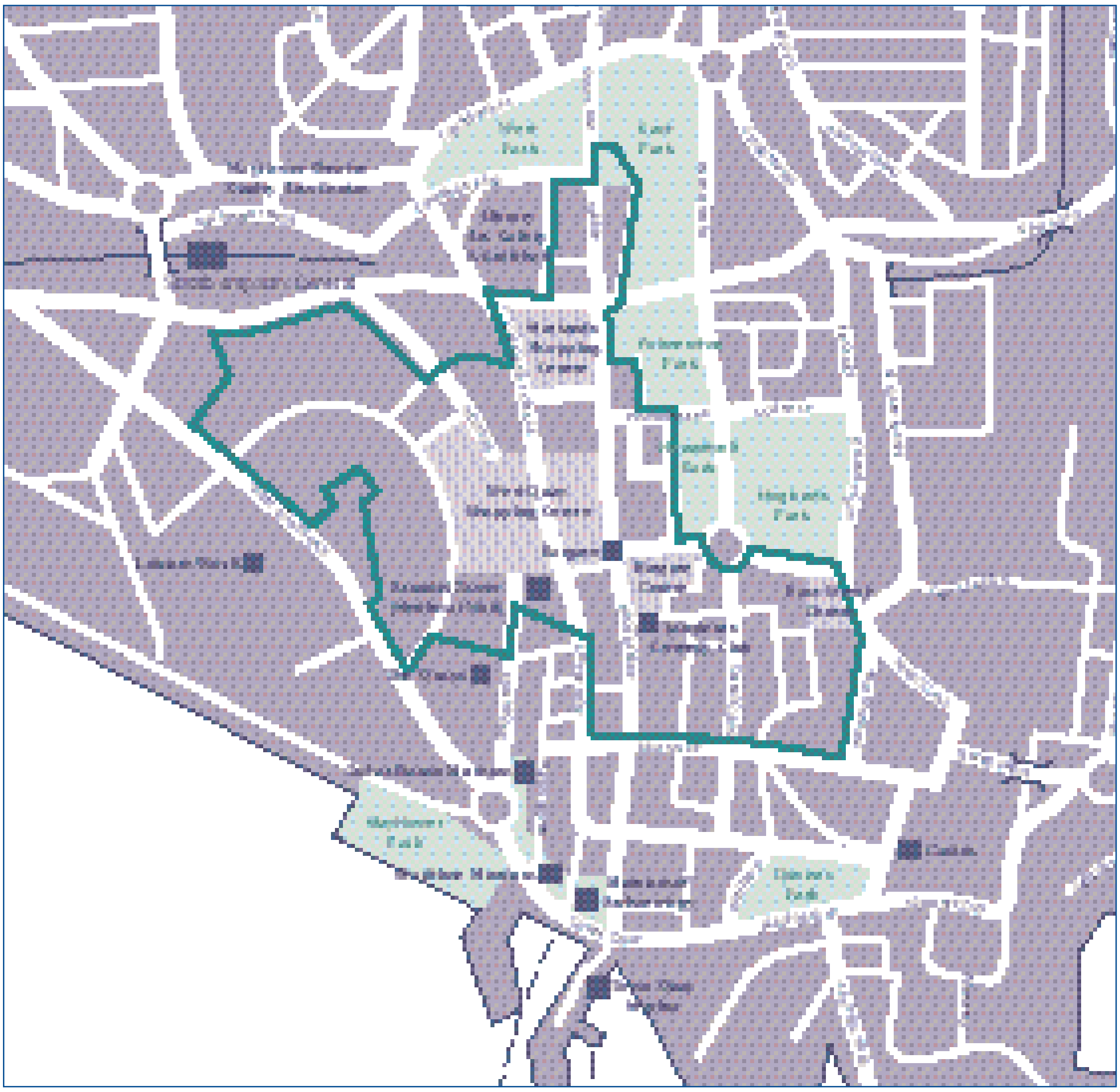
7

Leisure & culture

The leisure and cultural activities offered in Southampton city centre are of significant importance as they introduce diversity and vitality into the area and complement the retail activity. Through the provision of non-retail related activities, Southampton is providing vital facilities not only for the local population but also for visitors from a wider catchment area, such as those making business related trips, tourists and day-trippers.

Leisure

Considerable investment into the city's leisure sector has given rise to many new facilities at the edge of the Health Check area. They include **'The Quays'** Swimming and Diving Complex as well as **LeisureWorld**, new clubs, pubs and restaurants. The major leisure venues in the city centre are shown below.



The leisure venues **within the Health Check Boundary** are:

- 44 Restaurants/ Coffee Bars/ Fast Food & Take-Aways
- 18 Public Houses
- 4 Night-clubs
- 3 Amusement Arcades
- 2 Hotels
- 1 Sports/Health Club

In 1999/2000 the amount of leisure development slowed, with only one new public house opening. However, there continued to be strong interest in the city centre with nine planning applications received for 'food & drink' uses.

It has been estimated that 52,000 people visit Southampton on Friday and Saturday evenings, generating around £2/3million pounds of business per night.

The Southampton **Central Parks** enhance the city centre, providing a vast green open space on the periphery of the Health Check area.

Throughout the year the city centre and the adjacent areas host a variety of **annual events** including the Women's Festival in March, the Carnival in June, the Over 50's Festival and the Skatefestival (Mayflower Park) in August and the International Boat Show in September.

The 1999 Feedback Panel Survey shows a 17% increase in people being satisfied with 'Nightlife'. There has also been a 13% increase in the numbers satisfied with 'Sport and Recreation' facilities.

Culture

The map on the facing page provides an overview of the most important cultural venues in the city centre. At the core of the central shopping area is the Bargate monument. It forms part of the longest stretch of medieval city wall in the country and provides an historical setting for shoppers and visitors alike.

Cultural facilities within and close to the Health Check area include the Central Library and the Art Gallery as well as several museums and theatres.

The **Central Library** includes a Business Library, handling approximately 17,000 enquiries in the area annually. The library also works in concert with the European Information Centre, one of only 26 in the UK. In 1999/2000 the amount of visitors to the library dropped slightly by 4.5% to around 600,000 people. However, according to the 1999 Feedback Panel Survey, the satisfaction with the library services has risen by more than 3% to almost 70%.

The **Art Gallery**, which is internationally recognised as having one of the finest collections of 20th-century British art outside London, saw 65,700 visitors during 1999, similar to the 1998 levels. Since 1997 visits have increased by 11%.

The following table shows attendance figures of the major city council **museums** just south of the Health Check area. Since 1996/97 visits have risen by 40%. However, over the last year figures have dropped slightly, but remain at more than 80,000. The significant rise in visitors at the Maritime Museum is connected with the release of the film 'Titanic'.

Visitors at Major City Council Museums in the City Centre

	1999/2000	1998/1999	1997/1998	1996/1997
Maritime Museum	42,101	47,337	28,575	25,913
Tudor House Museum	29,454	30,808	25,252	25,646
Museum of Archaeology	9,295	10,014	7,508	6,193
Total	**80,850**	**88,159**	**61,335**	**57,752**

Source: SCC Historic Site Management

Community safety

Crime Statistics

The Health Check aims to provide an indication of how crime is being tackled in the city centre. Southampton City Council City Safety department has provided crime figures with assistance from the Crime Reduction Office of Hampshire Constabulary based at the Southampton Central Police Station. Within the Health Check boundary, the crimes listed below were recorded.

Offence	Recorded 1/10/98-31/3/99*	% of total	Recorded 1/10/99-31/3/00	% of total	Change +/-
Assault	50	5	107	8	57
Public order	22	2	47	4	25
Indecency	8	1	2	<1	-6
Dwelling burglary	1	<1	3	<1	2
Non-dwelling burglary	46	4	45	3	-1
Robbery	5	<1	12	1	7
Theft	177	17	186	14	9
Cycle theft	22	2	24	2	2
Theft from motor vehicle	96	9	73	6	-23
Theft of motor vehicle	13	1	23	2	10
Shoplifting	437	41	493	38	56
Deception/fraud	62	6	116	9	54
Damage	50	5	77	6	27
Damage to motor vehicle	32	3	35	3	3
Drugs	20	2	33	3	13
Miscellaneous	16	2	12	1	-4
Total	**1,057**		**1,288**		**231**

* Figures differ from those shown in Southampton City Centre Health Check 1998/99 due to source

Source: SCC City Safety / Hampshire Constabulary

In total the number of offences has risen by 22%. ‘Shoplifting’ is the most common offence. ‘Theft’ has a share of 14%. The number of ‘assault’, ‘public order’ and ‘deception/fraud’ offences have approximately doubled.

Safety & Security Initiatives

CCTV

Incidents and Arrests Involving CCTV in 1999/2000	
Theft	164
Drunkenness	33
Damage	35
Anti-Social Behaviour	28
Public Order / Assault	89
Suspicious Behaviour	20
Drugs	16
Traffic	7
Burglary (Commercial)	7
Vehicle Crime	12
Graffiti	1
Missing Person	10
Other	37
Total	**459**

Source: SCC Parking Operations/CCTV Unit

11 closed-circuit television cameras (CCTVs), monitored 24 hours a day, were installed within the **central shopping area** in May 1998. The city centre cameras have played a useful role in aiding the police to combat crime since they were introduced. Arrests and incidents related to CCTV operations are shown on the facing page. Whilst the figures cover all CCTV cameras within the city centre, the majority of these crimes were committed and recorded by those in the central shopping area.

The installation of further cameras within and close to the Health Check area is planned. The introduction of links with cameras within the WestQuay shopping centre development and The Quays Swimming and Diving Complex is also in progress. Furthermore, there are proposals to link the City Council CCTV control room with the “ROMANSE” traffic information network cameras in order to increase coverage of the city centre.

Apart from the cameras in the central shopping area, CCTV was also introduced into four city council run city centre car parks (Marlands, Eastgate Street, Grosvenor Square and West Park). Around 1.2 million vehicles use these multi-storey car parks each year. The installation of the cameras appears to deter vehicle crime, as data relating to crime levels within the car parks indicate a significant decrease.

Number of Theft of/from Motor Vehicles in Four City Council Multi-Storey Car Parks

	Theft of Motor Vehicles	Theft from Motor Vehicles
1997/1998	29	177
1998/1999	4	20
1999/2000	0	17

Source: SCC Parking Operations/CCTV Unit

All four car parks have been awarded the ‘Secured Car Parks’ certificate which is issued by the Association of Chief Police Officers, promoted by national government and administered by the Automobile Association and the British Parking Association.

Retail Radio Link

Initiatives to reduce shoplifting and retail crime also include a Retail Radio Link between shops, police and city centre CCTV control rooms. The scheme is expanding and now covers 60 stores (46 in the previous year) using 85 radio units (60 in the previous year). Since April 1998 this initiative has been supplemented by a ‘Retail Crime Operation’. It aims to unite the local major retailers to target, convict and deter persistent and professional shop thieves from operating in Southampton city centre. A constantly updated dedicated database holds details and photographs of known shoplifters and convicted thieves. Staff who spot potential offenders contact a co-ordinator (who is a store detective) and spread the information across the Retail Radio Link network. This links with an ‘Exclusion Order’ scheme so that if a persistent offender is arrested for an offence in a member’s shop and is charged or reported, they will be in breach of the Order. As a result persistent offenders are avoiding the stores in the scheme.

Safe Child Scheme

A Safe Child scheme was launched in November 1999. The nationally recognised scheme aims to reunite a child who has become parted from parents or guardians as soon as possible. All retailers and units on the Retail Radio Link network participate in the scheme, along with other appropriate outlets, working closely with shop staff.

Environmental quality

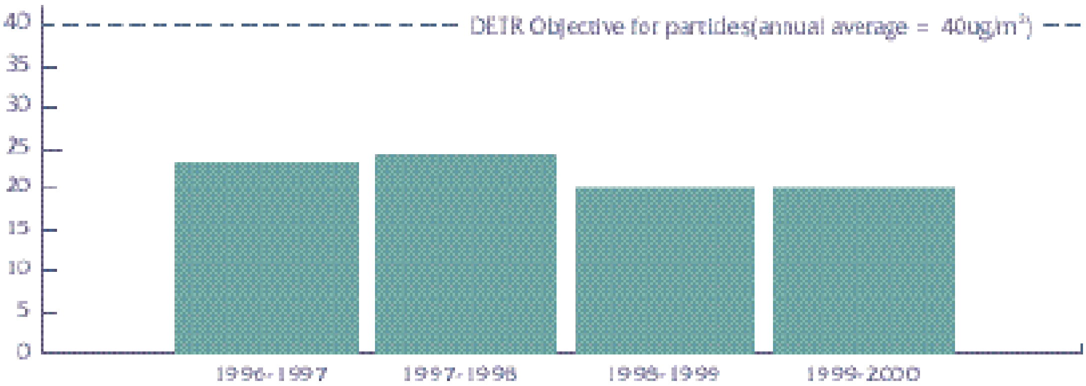
Environmental quality is an indicator of the level of attractiveness, comfort and enjoyment that has been achieved in the city centre.

Some indicators are detailed in this section, however, much of the information is 'soft' unquantifiable data. Nevertheless, they provide an overall picture of the city centre environment.

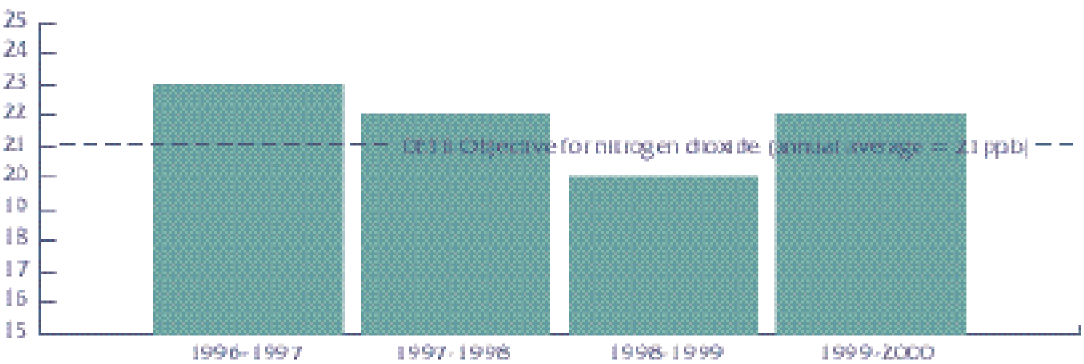
Pollution

A permanent Department of the Environment, Transport and the Regions (DETR) air quality monitoring unit is operating at Six Dials, a major junction at the periphery of the city centre (Brintons Road/Northam Road) used by approximately 26,000 vehicles per day and experiencing some congestion during peak hours.

Average Concentration of Particulates in Southampton City Centre



Average Concentration of Nitrogen Dioxide in Southampton City Centre



Source: National Environmental Technology Centre (NETCEN)

The average concentration of particulates in the city centre at 20 ug/m3 is about half the standard to be achieved by the end of 2004 objective set by the DETR (National Air Quality Standards in line with EU Directive). Levels have declined slightly over the period 1996 - 2000. The average concentration of nitrogen dioxide (NO2) slightly exceeds the provisional DETR objective of 21 ppb (parts per billion) to be achieved by the end of 2005. As traffic is the main cause for the pollution in city centres, Southampton City Council encourages people to use buses, trains and bicycles instead of individual cars. Moreover, car emissions of nitrogen oxides are expected to reduce as new air pollution control devices become more widespread.

Street Cleansing

According to the Feedback Panel Survey 1999 around 44% of citizens are still dissatisfied with street cleansing in Southampton (figure does not refer especially to the city centre). The current activities and improvements will result in an improvement of street cleanliness. New style gum and butts bins (a mixture of specialist gum and butts bins and integrated litter bins) have been piloted and introduced in the refurbished pedestrian precinct during the early part of 2000. There are more than 120 litter bins within the Health Check area and three glass recycling containers close by. To deal with fly posting, 'Operation Fly Swat' has been set up and started in April 2000. It will deal with fly posting on street furniture and illegal advertising boards (A-boards).

Environmental Enhancement

Major initiatives to enhance the environmental quality of the city centre are currently taking place:

The **Above Bar Precinct** Refurbishment Scheme is a programme of works costing nearly £1million which is providing new paving, seating, lighting and trees, in the core city centre area. This commenced in January 2000 and is due to be completed by autumn 2000.

In Above Bar Street improvement works have also been carried out by the City Council over a number of years as a part of the City Centre Transport Plan. Programmes for recent years are set out below, with a location plan overleaf.

Phase 1A (1997/1998)
Total Cost: £270,000

- Footway Repaving: 1,300 m2 (approx.)
- Carriageway Resurfacing: 850 m2 (approx.)
- Four new bus shelters
- New lighting columns on Above Bar Street
- Safer crossing points
- New street furniture

Phase 1B (1998/1999)
Total Cost: £240,000

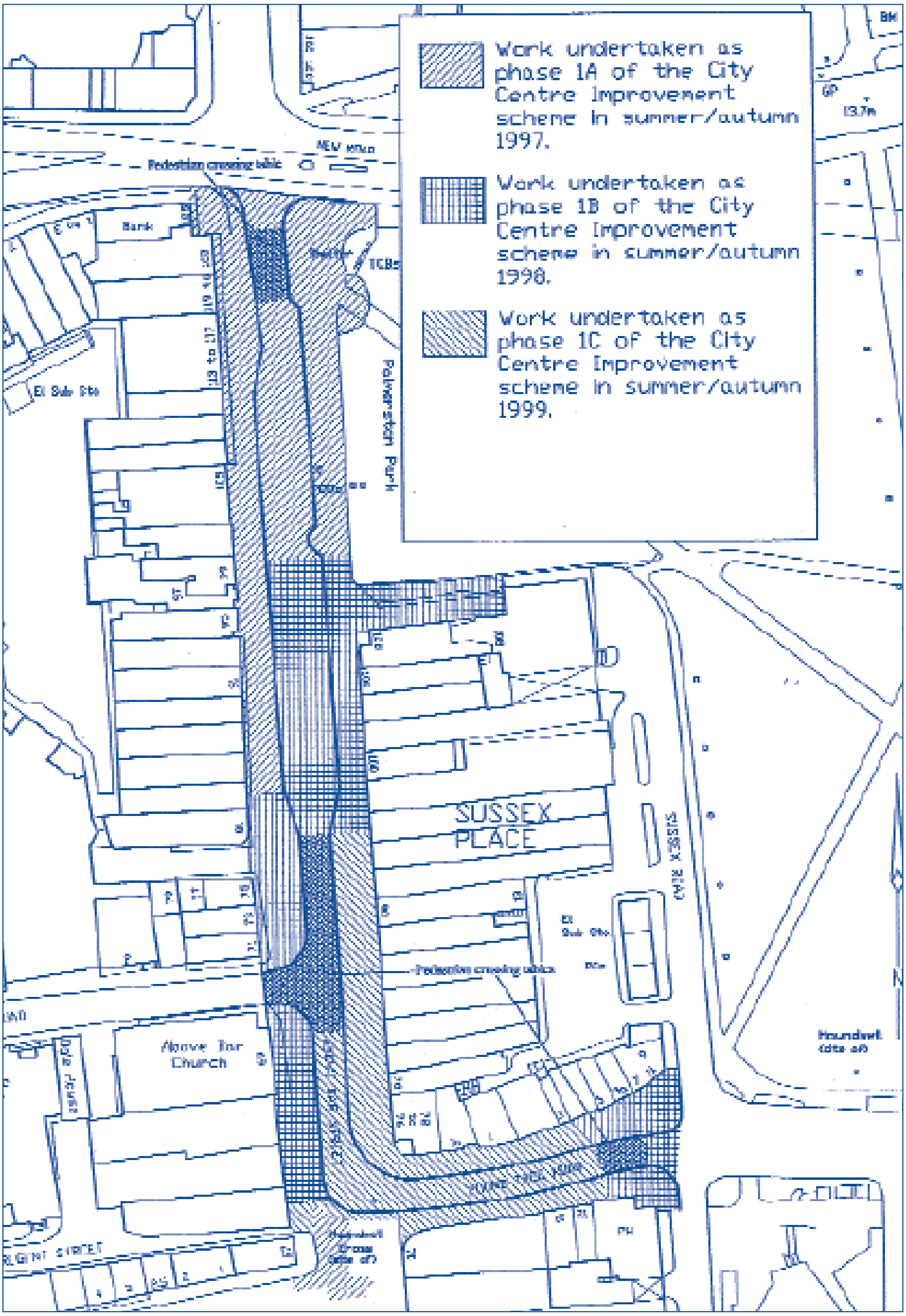
- Footway Repaving: 1,200 m2 (approx.)
- Carriageway Resurfacing: 1,000 m2 (approx.)
- One new bus shelter
- Work to 'Principles' corner of Palmerston Park
- Safer crossing points
- New street furniture

Phase 1C (1999/2000)
Total Cost: £195,000

- Footway Repaving: 980 m2 (approx.)
- Carriageway Resurfacing: 730 m2 (approx.)
- New lighting columns in Pound Tree Road
- Tree planting

Source: SCC Traffic and Transport Service

City Centre Improvement Scheme - Phases 1A, 1B, 1C - Location Plan



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Source: SCC Traffic and Transport Service

A total of £4.5 million is being spent on a scheme to restore Southampton's Central Parks. The **Central Parks** were established between 1845 and 1866 and represent an important expanse of open space in the city centre. They are Grade II listed on English Heritage's Register of Historic Parks and Gardens, contain eight listed monuments and provide a setting for the listed Civic Centre building. The project involves installing:

- 100 bins
- 160 lights
- 300 benches
- 750 sections of railing

The half-a-mile long path from the Queen's Peace Fountain in East Park to the Chamberlayne monument in Houndwell park has also been repaved.

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