

Southampton City Centre

2004/2005

Health Check



Highlights

- Southampton, the south's cultural and commercial capital, is the regional centre for shopping, employment, entertainment, healthcare, higher education and religious ethnic worship.
- 221,200 people live within the city boundary, with 67% of working age and 31,000 students.
- Passenger numbers at Southampton International Airport, which won three major awards, almost doubled in two years, with the Port of Southampton awarded for their 'Turnaround Port Operations'.
- The number of visitors to Southampton has increased, with the city becoming much more than just a work destination.
- Zero capacity in the city's car parks was an increasing occurrence, potentially leading to more vehicle movements as people search for spaces.
- Pedestrian flow continued to gravitate towards WestQuay at three times the average flow and the total registered users of the city's Shopmobility schemes rose by 22%.
- The number of units in the retail core has increased through subdivision of vacant premises into residential units and other small service and food & drink outlets.
- The increasing diversity of Southampton's offer is shown by the number of restaurants, coffee bars and take-aways increasing by 20% in the past year, and visitor figures to the Mayflower rising by 29%, to the City Art Gallery by 14% and to the Central Library tripling.
- Southampton is 7th in Experian's retail ranking and retail rents have hit £300 per sq ft, having first risen when a City Centre Manager was appointed and then again when WestQuay was opened. These levels have now outstripped both Cardiff and Kingston-upon-Thames.
- There was a 7.7% increase in the number of crimes recorded as opposed to last year's increase of 22%. Last year's high volume crimes fell and low volume crimes rose, suggesting short-term reactions in these categories.
- Illegal peddling activities were clamped down upon, with eight convictions, and the number of beggars in the core city centre streets fell, although some moved to car parks and outlying areas.
- Southampton's geothermal system, the UK's largest, has increased supply 30% since 2000.
- Environmental enhancement and the successes noted above have led to Southampton and the city's businesses winning several awards during the course of 2004/05, highlighting the city's strength in both regional and national arenas.

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Introduction to the Health Check

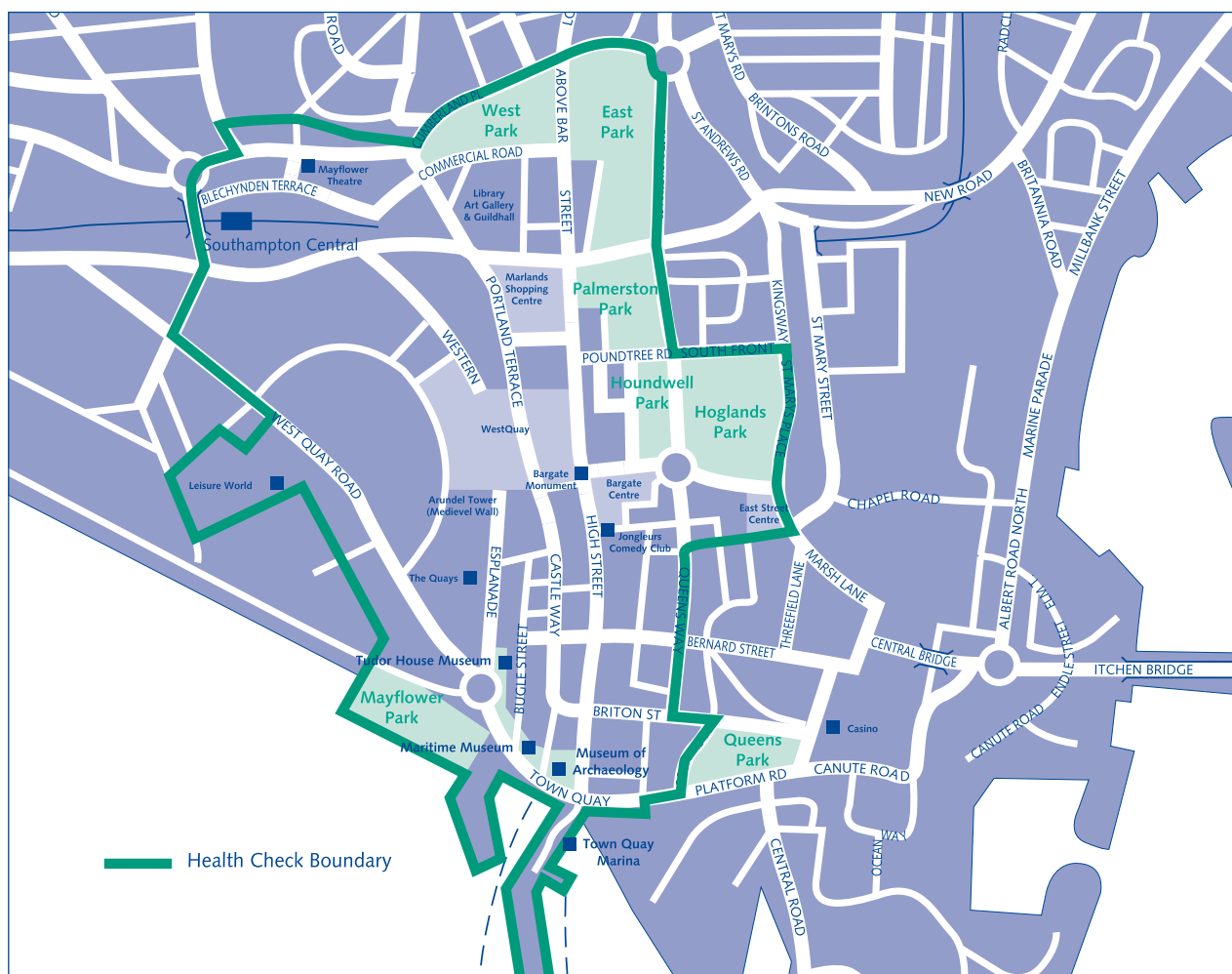
This document, prepared by Southampton City Centre Management, reports on the results of the eighth annual City Centre Health Check undertaken between April 2004 and March 2005.

The Health Check, which ultimately aims to improve the vitality and viability of the city centre and act as a key input into City Centre Management, has been produced in line with the recently published Planning Policy Statement (PPS6), which states that:

“Comprehensive, relevant and up-to-date monitoring is essential to the effective planning and management of town centres. It should be used to inform the review of site allocations and town centre policies and enable early signs of change of town centres to be identified and appropriate action to be taken.” It is suggested that in order to measure the vitality and viability and to monitor the health of their town centres and how this is changing over time, local authorities should regularly collect information on key indicators, preferably in co-operation with the private sector.

PPS6 sets out these key performance indicators, which are reflected in the measures adopted in this report. Over the years these provide baseline and time series information and are used to identify trends, areas requiring attention and to monitor the impact and consequences of recent investment in the city centre and the effects of future investment, such as the proposed £0.5bn of development outlined in Southampton City Council’s City Centre Vision 2.

The Southampton City Centre Health Check is aimed at a wide audience. It acts as a helpful and relevant aid to retailers and businesses, investors, developers and the Chamber of Commerce, as well as Southampton City Council, in examining how the city centre is changing and evolving.



Source: Southampton City Council

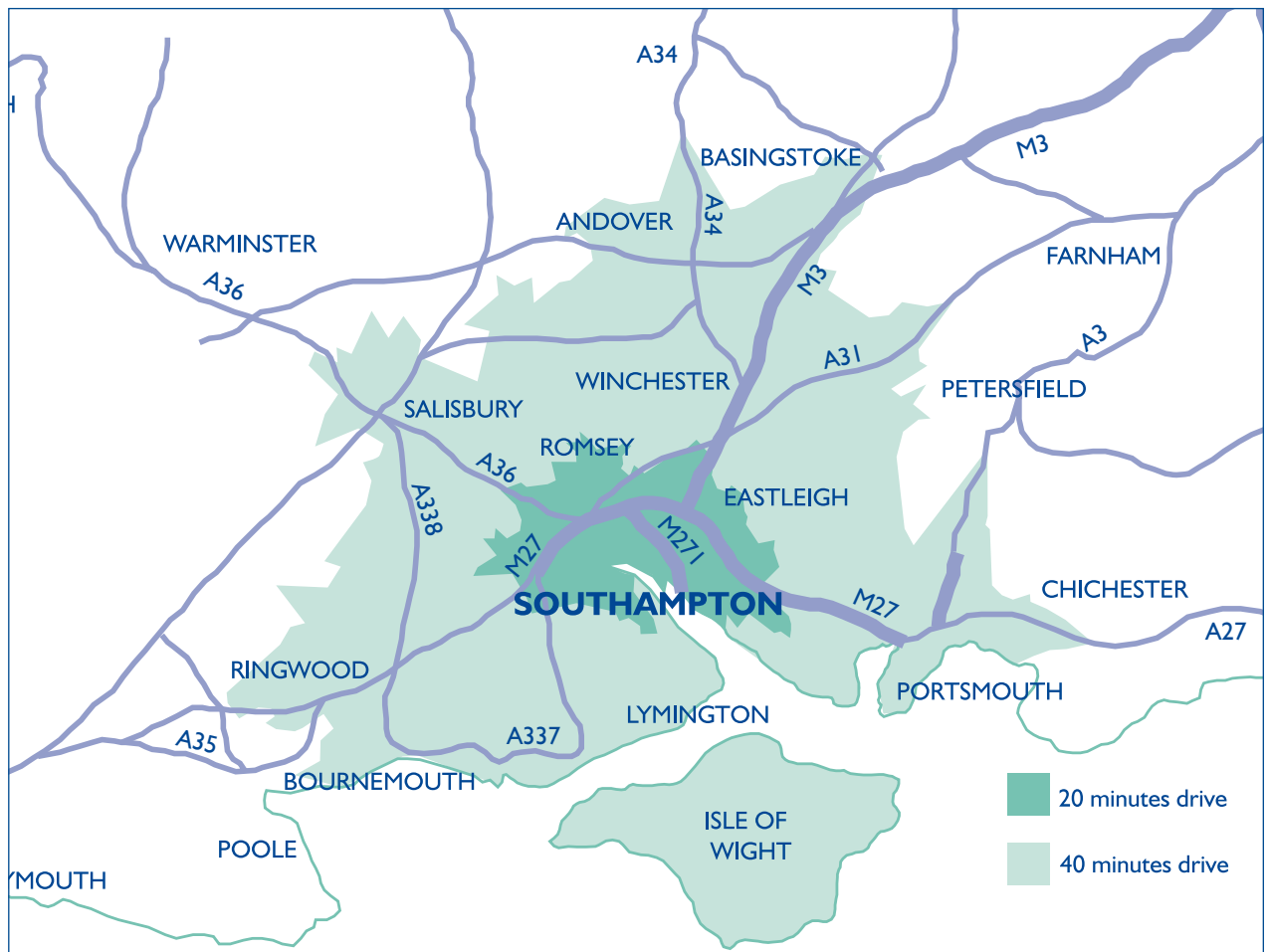
Background Information

Southampton, the South's cultural and commercial capital, is the regional centre for shopping, employment, entertainment, administration, general and specialised healthcare, higher education and religious worship for ethnic minorities.

In mid-2004, 221,200 people were estimated to live within the city boundary. However, as a regional centre Southampton has a wider catchment population, as shown on the map below. Within a 20-minute drive there is a catchment population of over 400,000, whilst just under one and a half million people live within 40 minutes drive time. Of Southampton's population, around 67% are of working age, higher than both the South East region's level and the national level. There is a student population in Southampton of around 31,000, whilst there are just under 50,000 economically active females and about 60,000 economically active males. Major employers in Southampton (excluding public sector) include Ford Motor Company, Ordnance Survey, Skandia Life (UK HQ), John Lewis and British American Tobacco (BAT), although several of these, such as BAT and Ordnance Survey are re-examining their operations (Source: Southampton City Council).

In 2003 Southampton City Centre Management held a conference entitled 'Southampton: A success story' highlighting the aspects that make the city thrive, such as transport links, educational facilities, the leisure offering and its night time economy, as well as business successes within the city centre. To complement this, the 2004/05 Health Check notes that in several spheres Southampton has now been highlighted as an **'Award Winning City'**.

During the year, Southampton was declared regional winner at the South East England Town Centre Management Awards and won the 'Managing the Night Time Economy' category. This was as a direct result of work that has been undertaken by Southampton City Centre Management. WestQuay shopping centre also won a national award of merit from the British Council of Shopping Centres for the Best Advertising Campaign 2004 for its 'Welcome to a World of Pleasure' campaign. At a local level, The Mall Marlands hosted an awards ceremony - the Maftas (The Mall Awards for Trading Achievement). This was hosted by the Mall Corporation who bought The Mall Marlands in December 2003, and The Mall Marlands scored highest



Source: Savills Residential Development Southampton

overall of any of the Mall Corporation's eighteen shopping centres across the country, with thirteen stores scoring 100% in a rigorous test of customer service and presentation.

These successes continue with the ongoing plans to further redevelop and invest in the city centre. During the year, Jury's Inn neared completion, whilst plans for several key developments neared fruition. The Charlotte Place site will, alongside Jury's Inn, also provide 9,800 sq m of new office space, whilst 10,500 sq m will be provided by a scheme at Mayflower Plaza near the railway station, which received consent this year. Documents such as the City Council's North South Spine Strategy were finalised and other new documents, such as the Streetscape Manual, went out for public consultation. These examine the quality of the public realm in the city centre and how best to improve this, concentrating especially on the key route running through the centre of the city. All documents are available on www.southampton.gov.uk or from the council's City Design Team.

The key route of the North South Spine has The Bargate at its core, and this area has been used to stage a multitude of events. These varied from a Stowells wine tasting event, with dancing displays from the many countries where their wine is produced, a T-Mobile event, a 'Venus in Transit' event, a Charity Balloon Launch and Hyundai's sponsored Euro 2004 Goodwill Ball Roadshow, where a football with the home country's flag on it was signed by people in key cities to provide good luck messages to their country's team. Events in this space provide street entertainment, which is good for the whole city centre, as it enhances the environment and contributes to the 'feel good' factor. On Above Bar Precinct there were children's rides at weekends in the summer, along with strolling jazz bands. The Big Top came to Hoglands Park, with Zippo's Circus, whilst the annual Euroblade event took place with in-line skaters coming from Le Havre to skate through the city centre alongside British participants. The Southampton Boat Show was once again one of the jewels of the Southampton year, this year using a brand new area, Solent Park, taking the show to an amazing 30 acres in total.

Christmas was marked by a major season of events including, for the first time in Southampton, a German Market, with solidly constructed traditional wooden stalls tastefully decorated and lit, selling German food and drink, as well as home-made art and craftwork. The traditional carousel was also in place in the Precinct. Events also included a carnival parade by residents of Thornhill and a laser light show at The Bargate. All these events were marketed by a strong City Centre Management advertising campaign focusing on Christmas. Dolphin Lane, off High Street, also took part in the action, by providing festive crafts, a Santa's grotto, mulled wine and hot chestnuts every Sunday in aid of Wessex Cancer Trust. This small scale niche development characterises the changes happening in the south of the city centre, where a boutique shopping thoroughfare has been created alongside the Dolphin Hotel, inspired by Brighton's Lanes.

Southampton is also the UK's cruise capital, and is home to P&O and Cunard liners such as Aurora, Arcadia, QEII and Queen Mary 2.

This Health Check examines issues in the city centre in more detail. Of note, a SWOT analysis was undertaken amongst retailers in the city centre over the year and the strengths included the variety of shops, and parking, with weaknesses being vagrants and lack of staff parking. The opportunities were further development, themed events and promotions, and the threats were out of town free parking and a shabby image. This year, the Health Check highlights the changes that have been made, and some of the areas where further change is needed. However, generally Southampton is continuing to thrive and, whilst it was noted last year that places the size of Southampton cannot expect to achieve the status of capital cities, they can find their own success. It is evident that in many varied aspects, whilst there are ongoing issues, Southampton is an award winning and successful city.

Travelling to Southampton

Although Southampton has a coastal location, its city centre is highly accessible by both private and public transport and it is often cited in surveys as being 'close to London'. A partnership of local authorities, transport operators, business interests and infrastructure providers in the local area have joined forces to form Solent Transport, in an aim to tackle congestion by providing a wider choice of travel, overcoming geographical, modal and organisational barriers.

Southampton is integrated into the regional and national **road network**, with the M3 and M27 motorways serving the city and providing rapid road links from many major cities, including London and Birmingham. Southampton can be reached from the M25 motorway within an hour. From 2003, those arriving in Southampton by road have been greeted with new city boundary gateway signs and 'Welcome to Southampton' banners featuring images related to the city, with signage promoting Southampton as the home of Queen Mary 2 at strategic entry points to the city, improving first impressions on arrival.

Southampton Central railway station is the hub of the region's **rail network**, with frequent services operating from many destinations throughout the country, including direct services from Scotland. Principal frequent direct train services include London, Basingstoke, Bournemouth and Poole, with hourly services to Bath, Bristol, Birmingham, Cardiff, Chichester, Gatwick Airport and Oxford.

Local services were expanded in May 2003 when Chandler's Ford station to the north of the city was re-opened, extending the Eastleigh/Southampton service to operate between Totton and Romsey via Eastleigh and Chandler's Ford. This is part of the effort to encourage people to use the train rather than road transport.

Over the past year the number of South West Trains rail journeys either starting or ending at Southampton has increased 2.4% which is in line with the previous years' increases. In December 2004 a new timetable was introduced across South West Trains, and this involved a thorough review of all train times for all stations. This may account for the slight fall in the increase, although this is not significant, and it is more likely that people simply shift their travel patterns where possible.

Passenger journeys on South West Trains to and from Southampton Central railway station

2000/01	2001/02	2002/03	2003/04	2004/05
4,095,000	4,181,000	4,377,000	4,542,000	4,652,000
	+2.1%	+4.7%	+3.8%	+2.4%

Source: South West Trains

The National Express **coach station** lies within the city centre, linking Southampton into the national coach network with direct services to London and Heathrow Airport every hour, Bournemouth and Portsmouth every second hour, and Edinburgh every day. The numbers travelling to Southampton by National Express coaches have increased consistently over the past few years with an increase of 7.8% in 2004/05, similar to that of the previous year. On the London route, which accounts for the largest sector, there was an increase of 10%, but a few inconsequential declines on some of the non-London routes reduced the overall increase. Regional bus operators also provide frequent services to various destinations within the South of England.

Passenger journeys on National Express Coaches arriving in Southampton

2000/01	2001/02	2002/03	2003/04	2004/05
117,000	135,000	143,000	154,000	166,000
	+15%	+6%	+7.7%	+7.8%

Source: National Express

Southampton International Airport is one of the fastest growing European regional airports, with passenger numbers almost doubling in the last two years. In 2004/05 it broke the 1.5 million figure. Despite rapid growth, service standards have been maintained and it remains the fast track choice for central southern England for several reasons:

Southampton Airport is served by its own dedicated railway station - Southampton Parkway, which provides the shortest train to plane connection of any European airport. There are approximately three trains per hour to London Waterloo with a journey time of just over an hour. The airport is also close to the M27 motorway (Junction 5) and the M3.

The airport is currently investing around £14million over three years in order to maintain high levels of customer service during this period of rapid expansion. This follows on from £50million which has been invested at the airport over the last ten years. Recent investments have included a redevelopment of the departure lounge to double the capacity, improvements to baggage equipment and facilities for business travellers, and increasing the capacity of the long stay car park.

Southampton Airport has increased international destinations by 18 new routes over five years, and international passengers by more than 250% over the same period. The airport now serves nearly 40 destinations in 11 European countries and is continually increasing this network. Recent new routes include Paderborn with Air Berlin, Isle of Man with EuroManx and Sardinia with Holiday Options as well as the low fares airline Flybe, which has introduced new routes to La Rochelle, Bergerac, Perpignan, Brest, Bordeaux, Limoges, Liverpool and Rennes.

On the theme of **awards**, Southampton Airport has received three major awards in the last year alone including KPMG's Hampshire Company of the Year 2004, Airport of the Year Award from the European Regions Airline Association 2004/05 and the Top UK Airport 2005 from Wanderlust Travel Magazine.

Passengers at Southampton International Airport

2000/01	2001/02	2002/03	2003/04	2004/05
870,975	840,911	794,441	1,373,035	1,550,000
	-3.5%	-5.5%	+72.8%	+12.9%

Source: Southampton International Airport

Red Funnel **vehicle ferries** and **high-speed catamarans** link Cowes on the Isle of Wight with Town Quay, on the edge of Southampton's city centre, every 30 minutes. The numbers of passengers and vehicles carried between the Isle of Wight and Southampton have continued to increase, even overtaking the high level of 2001/02, when the America's Cup was held. The cross Solent market has shown only marginal growth but Red Funnel has continued to grow market share. Red Funnel's main competitor is Wightlink, operating from Portsmouth and Lymington.

Passengers and vehicles on Red Funnel crossings

	2000/01	2001/02	2002/03	2003/04	2004/05
Passengers	2,629,379	2,823,898	2,771,083	2,873,670	2,966,305
		+7.4%	-1.9%	+3.7%	+3.2%
Vehicles	487,058	517,530	523,659	547,908	586,438
		+6.3%	+1.2%	+4.6%	+7.0%

Source: Red Funnel Group

White Horse Ferries also operate **passenger ferries** across Southampton Water from Hythe and the New Forest every half an hour. This service carries almost half a million passenger movements a year.

The **Port of Southampton** holds the accolade of not only being the UK's leading vehicle-handling port, but has also long been the UK's premier cruise port, handling 550,000 passengers in 2004.

In total, cruise business at the Port of Southampton has almost doubled over the last five years, with the port handling more turnaround cruise calls than all other UK ports combined. Last year it was expected that the port would handle 500,000 cruise passengers (+6%), but in fact the actual figure was 550,000 (+17%). This rose even higher to an increase of 24% in 2005. Southampton has three times as many passengers as Dover and four and a half times as many passengers as Harwich. Internationally, Southampton is the largest of the Northern European Cruise Ports and is 1.75 times as large as the next largest (Copenhagen). However, it is still well behind the Mediterranean ports, having less than half the number of passengers as Barcelona, about two-thirds the number of Venice, and about three quarters the number of Napoli and Genoa. However, this can be accounted for by the fact that, unlike these southern European ports, Southampton is not a destination port.

Number of cruise passengers handled by the Port of Southampton

2001	2002	2003	2004	2005
354,000	390,000	470,000	550,000	680,000
	+10%	+21%	+17%	+24%

Source: Associated British Ports

To cater for the fast growing cruise market, Associated British Ports, which operates the port, has invested over £10million in upgrading Southampton's two existing deep-water cruise terminals and developing a third facility so that the city now has three dedicated cruise terminals, with first class reception facilities. All three make use of the excellent transport links that Southampton enjoys. In particular, the QEII Terminal has direct rail links accommodating passenger trains including the Orient Express. The city acts as the home port to all of P&O's and Cunard's UK cruise vessels, with P&O confirming Southampton as their principal UK cruise port until 2013 and Cunard until 2009. The port also plays host to the promotion of new vessels, naming ceremonies and promotional calls of many cruise lines.

The Port of Southampton also won an **award** for 'Turnaround Port Operations' for the second year running at a ceremony in Miami during the world's largest cruise conference. The award is given as a result of an annual survey of ports and cruise destinations amongst the world's top cruise lines and cruise ship captains.

Although many passengers do not stay in Southampton, the cruise industry accounts for much of the city's economy in terms of supplies and refits. Passenger expenditure is estimated at £6.65m and 71 jobs are sustained, excluding overnight stays. Overnight stays generated a further £3.86m and 82 jobs. Crew expenditure generated 51 jobs from £4.84m expenditure. (Source: Southampton City Council)

Travel within Southampton

Southampton is well served by **public transport**. Several operators provide the main **bus network**. First mainly serves the city area, and Solent Blue Line serves the city and surrounding districts. Minerva Accord operates the Unilink network of services, which is centred on the University of Southampton. Wilts and Dorset and Stagecoach Hampshire provide additional inter-urban connections. Key interchanges are situated just off the central pedestrian precinct. Up to 40 different bus routes run through the city centre's Above Bar Street. During the week most city services operate with a frequency of at least every 10 minutes with many corridors having a more frequent service. Annually there are over 20 million bus passenger trips throughout Southampton (combined data from all bus companies).

The City Link shuttle bus connects Southampton central railway station directly to WestQuay, the city centre and Town Quay ferry terminal operating every ten minutes during shopping hours and 30 minutes at other times. Surveys carried out show over one million passengers use the service annually.

Additionally, the city council subsidises Nightlink services operating to the east, west and north of the city, which run every thirty minutes between 00.00 and 02.30. These complement the services to Winchester and Eastleigh (operated commercially by Solent Blue Line) and the services to Hedge End and Hamble (operated by First and funded by Eastleigh Borough Council), which run hourly between 00.15 and 02.15 on Friday and Saturday nights. These services continue to be well-used with nearly 40,000 passengers currently using the Nightbus network per annum.

First run one of the country's largest fleet of 10 buses powered by natural gas (CNG), producing less pollution and noise than their diesel counterparts. Both First and Solent Blue Line operate a significant proportion of their vehicle fleets as low-floor buses, each of which provide one wheelchair space on board and are beneficial to a wide section of the community, not simply wheelchair users.

Minerva Accord's buses within the city are all low-floor, and permit the carriage of cycles free of charge at all times (subject to space). Wilts and Dorset also operate a large number of low-floor buses on their services.

South West Trains run a '**Park & Rail**' scheme (The WestQuay Weekend Shopper) from Southampton Airport Parkway station to Southampton Central at weekends and bank holidays, taking passengers into the city centre at a special discounted rate on three to six trains per hour depending upon the time of travel.

Taxis are widely available. Principal ranks can be found at key strategic points, including 13 within the Health Check boundary (see Transport Map on page 13). In 2005 there were 263 Hackney Carriages and 390 Private Hire Taxis operating in the city.

The city centre is a key destination for **cyclists** and over the past year investment by the city council in this form of transport has continued with a new City Bike Guide, detailing the cycle network, to be launched later in 2005. The network of cycle lanes and shared-use routes to enable access throughout the city centre to shops and businesses has increased; over 5 kilometres of new tracks were installed in the last year. Special 'Toucan' signal controlled crossings have been installed to assist cyclists to cross safely at busy junctions and Advanced Stop Lines (ASLs) marked out at key junctions giving cyclists a more prominent position ahead of other traffic. Over the year the cycle parking programme continued with another 60 stainless steel Sheffield Stands installed in the city centre.

The city council is actively working to encourage cycling as a practical means of transport whilst targeting accident reduction measures. The theme of 'Active Travel' is the message that Southampton City Council, with its partners Sport England and the NHS City Primary Care Trust, is using to encourage more walking, cycling and exercise as well as good nutrition. A number of Active Travel events were run in various communities highlighting the need to get more active. Free guided cycle rides and health walks were offered. The locations of exhibitions included WestQuay shopping centre as well as other city-wide locations.

Traffic management in the city centre is aided by the 'ROMANSE' **Traffic Information** System whereby 24 signs, within and just outside the Health Check boundary, are utilised to provide information about traffic conditions across the network. A further 31 signs highlight car parking spaces on routes into the city centre.

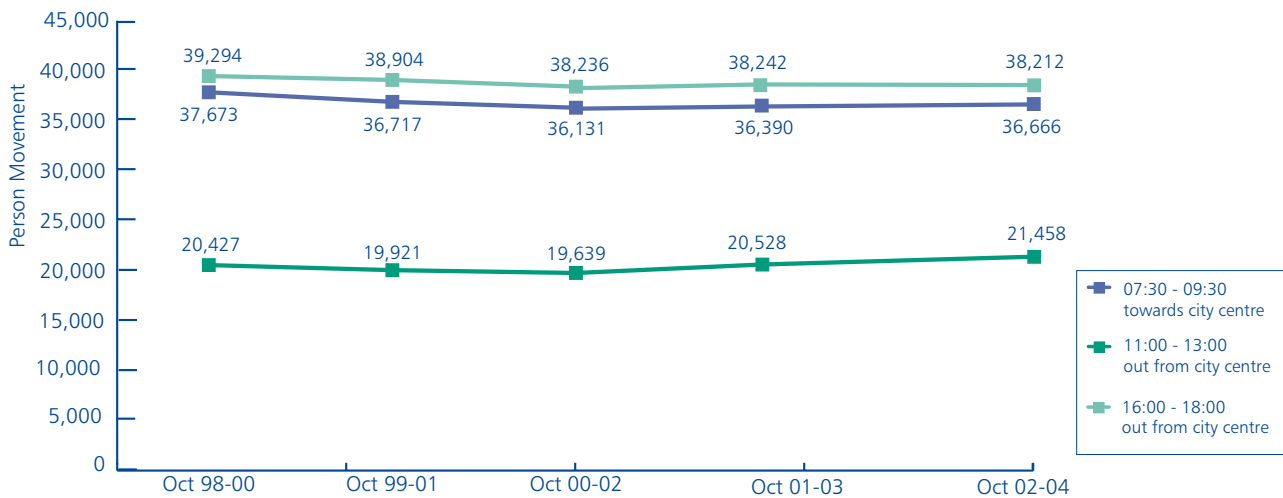
Transport flows and modal split

Transport flow information can be used to provide an indication of the number of people (not vehicles) entering and leaving Southampton city centre, and regular annual surveys are undertaken. 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 to avoid fluctuations due, for instance, to the weather.

The graph overleaf indicates that traffic flow approximately doubles during peak hours compared to off-peak times. The numbers entering the city in the morning peak have increased slightly once again compared to the previous period, but a similar level leave at the evening peak. However, it appears that people leaving the city at lunchtime has increased again by a similar rate, and is still higher than the 1998-2000 level. This suggests that more people are coming to the city centre, and that this increase in visitors has led to an increase in the numbers leaving at times other than the evening peak. More people may be coming to the city centre just for the morning.

Over the past few years it has been proposed that Southampton is becoming more than just a work destination, with people staying longer, although the numbers had been decreasing in the morning peak. This year's findings corroborate last year's view that more people are coming to Southampton and perhaps, whilst the employment justification still exists, there are other factors attracting people to the city centre at various times of day and for various lengths of stay, helping to explain the increased rate of flow out during off-peak times, and the consistent rate of flow out in the evening peak. In future, it might be useful to examine flow rates in the reverse directions given the change of use in the city centre from purely employment to a mix of employment, residential and leisure use.

Total traffic flows into and out of Southampton city centre



Source: Southampton City Council

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

Private transport accounts for almost two-thirds of Southampton’s person movement, public transport about one quarter during peak hours and pedestrians between one tenth and one fifth, with relatively little change over the past year. The private car remains the main component, with around a 60% share, followed by the bus and pedestrians, pedestrians being slightly higher over the lunchtime period.

The split between the different modes of transport shows negligible changes over the past four year period. However, the three noticeable trends are that bus use has continued to drop in each period every year, whilst rail and ferry use has been increasing but has levelled out in the past year and pedestrians have accounted for a greater share of all movement in the morning and evening periods over the years, although they still have a higher percentage at lunchtime. Therefore, whilst there is still a preponderance for the private motor vehicle, it does appear that there is a small shift towards public and more environmentally friendly methods of transport, such as pedal cycles, pedestrian movement, ferry and train use. However, the main increases in these modes may have been at the expense of bus use. Light vehicles (cars) seem to have increased in the lunchtime and evening exodus at the expense of bus use and pedestrians.

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

It is clear that the use of bus, train and ferry is particularly a ‘commuter’ form of transport with a substantial dip in the lunchtime period, whereas cars and walking are modes of transport that account for an even greater proportion of travel during the daytime off-peak hours. This is a time when people are moving around the city, rather than possibly entering or leaving, which would also help to account for the increase in pedestrian activity.

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

		1999 – 2001	2000 – 2002	2001 – 2003	2002 – 2004
Private	Light vehicle	22,253 (60.6%)	21,531 (59.6%)	21,559 (59.3%)	21,988 (60.0%)
	Motor cycle	364 (1.0%)	382 (1.1%)	368 (1.0%)	375 (1.0%)
	Pedal cycle	550 (1.5%)	566 (1.6%)	656 (1.8%)	728 (2.0%)
	Total private	23,167 (63.1%)	22,479 (62.2%)	22,583 (62.1%)	23,091 (63.0%)
Public	Bus	7,442 (20.3%)	7,267 (20.1%)	7,230 (19.9%)	6,751 (18.4%)
	Rail	1,662 (4.5%)	1,770 (4.9%)	1,854 (5.1%)	1,865 (5.1%)
	Ferry	801 (2.2%)	873 (2.4%)	897 (2.4%)	880 (2.4%)
	Total public	9,905 (27.0%)	9,910 (27.4%)	9,981 (27.4%)	9,496 (25.9%)
	Pedestrian	3,645 (9.9%)	3,742 (10.4%)	3,826 (10.5%)	4,079 (11.1%)
	Overall Total	36,717 (100%)	36,131 (100%)	36,390 (100%)	36,666 (100%)

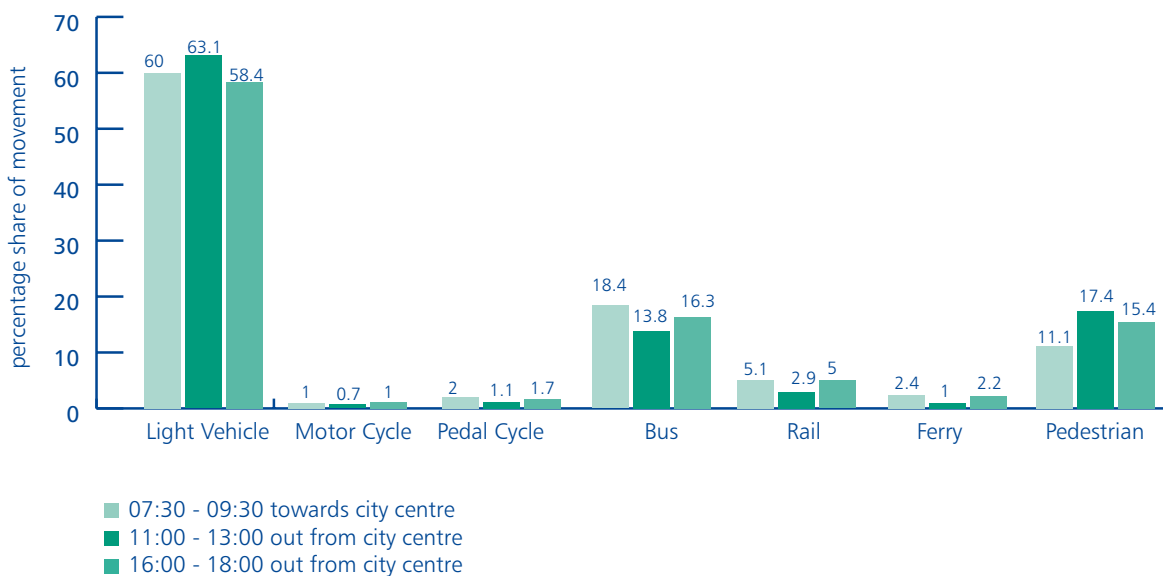
Person movement out of the city centre 11.00-13.00 split by mode of transport

		1999 - 2001	2000 - 2002	2001 - 2003	2002 - 2004
Private	Light vehicle	12,424 (62.4%)	12,196 (62.1%)	12,755 (62.1%)	13,533 (63.1%)
	Motor cycle	118 (0.6%)	130 (0.6%)	138 (0.7%)	147 (0.7%)
	Pedal cycle	185 (0.9%)	195 (1.0%)	216 (1.1%)	237 (1.1%)
	Total private	12,727 (63.9%)	12,521(63.7%)	13,109 (63.9%)	13,917 (64.9%)
Public	Bus	3,151 (15.8%)	3,027 (15.4%)	2,937 (14.3%)	2,968 (13.8%)
	Rail	466 (2.3%)	521 (2.7%)	613 (3.0%)	627 (2.9%)
	Ferry	187 (1.0%)	198 (1.0%)	213 (1.0%)	205 (1.0%)
	Total public	3,804 (19.1%)	3,746(19.1%)	3,763 (18.3%)	3,800 (17.7%)
Pedestrian		3,390 (17.0%)	3,372 (17.2%)	3,656 (17.8%)	3,741 (17.4%)
Overall Total		19,921 (100%)	19,639 (100%)	20,528 (100%)	21,458 (100.0%)

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

		1999 - 2001	2000 - 2002	2001 - 2003	2002 - 2004
Private	Light vehicle	22,619 (58.1%)	21,917 (57.3%)	21,985 (57.5%)	22,324 (58.4%)
	Motor cycle	386 (1.0%)	384 (1.0%)	403 (1.1%)	381 (1.0%)
	Pedal cycle	579 (1.5%)	571 (1.5%)	642 (1.6%)	658 (1.7%)
	Total private	23,584 (60.6%)	22,872 (59.8%)	23,030 (60.2%)	23,363 (61.1%)
Public	Bus	7,560 (19.4%)	7,114 (18.6%)	6,494 (17.0%)	6,229 (16.3%)
	Rail	1,691 (4.4%)	1,798 (4.7%)	1,874 (4.9%)	1,909 (5.0%)
	Ferry	766 (2.0%)	817 (2.1%)	886 (2.3%)	823 (2.2%)
	Total public	10,017 (25.8%)	9,729 (25.4%)	9,254 (24.2%)	8,961 (23.5%)
Pedestrian		5,303 (13.6%)	5,635 (14.7%)	5,958 (15.6%)	5,888 (15.4%)
Overall Total		38,904 (100%)	38,236 (100%)	38,242 (100%)	38,212 (100.0%)

Split in movement over time into and out of city centre, 2002-2004



Source: Southampton City Council

Pedestrian movement within the city centre

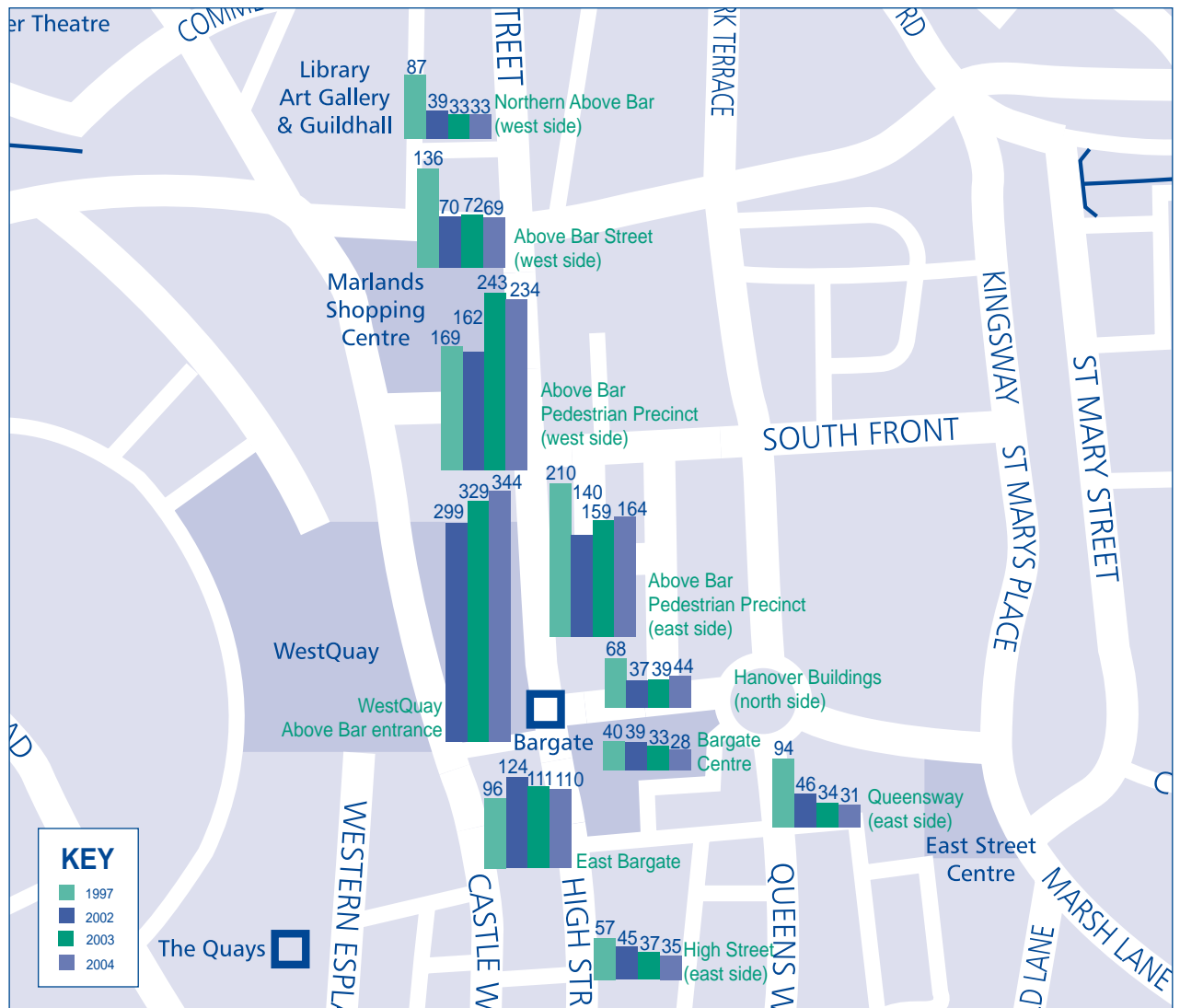
A set of pedestrian flow counts was commissioned from PMRS to follow on from previous years. The flows were measured at various sites from Northern Above Bar, to the High Street, and from East Street to the western side of the High Street. Ten points were chosen to analyse in this document, using the figures benchmarked to an average index of 100.

The following map shows how the percentage of average flow has altered over the past seven years, highlighting the change since the opening of WestQuay shopping centre.

In 2004, the highest flows in terms of the selected points, at over three times the city centre average, were recorded on Above Bar pedestrian precinct at the entrance to WestQuay, in line with last year. However, in 1997 the highest count was recorded outside the current Primark store (then Marks & Spencer) on Above Bar pedestrian precinct, but this only represented twice the average count. The west side of the pedestrian precinct at River Island has also seen a significant increase in footfall. Interestingly, the footfall on the eastern side of the precinct is not only less since WestQuay opened, but is significantly less than current footfall on the western side. Flows at the extreme points such as the Above Bar Street to the north and the east side of the High Street and at Queensway are decreasing. Those on the northern side of Hanover Buildings, and outside the entrance to WestQuay and the eastern side of the precinct were the only ones to have increased. For the first time in the three years, the count on Northern Above Bar remained constant, although at almost a third of the city centre average.

Average pedestrian flows 1997-2004

(survey dates 6/7 June 1997, 21/22 June 2002, 20/21 June 2003 and 18/19 June 2004)



Source: Southampton City Council / PMRS

This further increases the range between the areas of highest flow and those of low flow and reinforces the view that a gravitational change has taken place as people concentrate more in the area around WestQuay and the pedestrian precinct, and in particular the western side of the precinct. This is correlated with the highest count representing three times the average rather than the highest count in 1997 being only twice the average.

It is assumed that this is directly attributable to the pull of WestQuay shopping centre and its car parking facilities, drawing people closer to the centre rather than to outlying parking locations and visitor attractions. The footpath to the western side of the precinct continuing further north without interruption by roadways, could also play a role.

There are plans to pedestrianise the area around The Bargate, which could cause a change in footfall due to ease of movement rather than gravitational pulls. This will be monitored in future years.

Accessibility for disabled people

To aid accessibility for disabled people in the city centre there are two Shopmobility schemes in operation, one within WestQuay, and the other in Castle Way near to the shopping centre and retail core. Both schemes provide powered wheelchairs/scooters and manual wheelchairs, allowing both permanently and temporarily disabled people to shop and carry out their business independently. The Shirley satellite office for City Shopmobility closed due to loss of funding but as a result the vehicles were moved to the city centre site. At WestQuay there is a new addition to their service, in the form of a small stock of mobility aids for sale.

Registrations at Southampton City Shopmobility and WestQuay Shopmobility 2004-2005

(2003-04 figures shown in brackets)

	Southampton City Shopmobility (Castle Way)		WestQuay Shopmobility		Total	
Parking spaces available	17	(17)	14	(14)	31	(31)
New registrations 2004/05	376	(376)	1,263	(1,240)	1,639	(1,616)
Total registered 31 March 2005	2,587	(2,227)	6,430	(5,166)	9,017	(7,393)
					+22%	(+28%)

Source: Southampton City Shopmobility and WestQuay Shopmobility

Daily usage of WestQuay shopmobility 2002-2005

(Figures for Southampton City Shopmobility not available)

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Total
2002-03	1,032	1,053	1,077	1,209	1,154	1,205	612	7,342
2003-04	1,098	1,142	1,287	1,234	1,176	1,290	606	7,833 (+10.5%)
2004-05	1,087	1,171	1,210	1,308	1,123	1,110	599	7,608 (-2.9%)

Source: WestQuay Shopmobility

New registrations remain above the 1,600 level, and although WestQuay Shopmobility has seen a slight rise in the level of new registrations this year, City Shopmobility has seen an identical number of new registrations. As a result, the total registered has increased by 22% during the year showing that the shopmobility schemes are continuing to perform well and attract new clients.

The weekly usage this year is shown only for WestQuay due to data corruption at City Shopmobility, but total usage figures at the City Shopmobility (4,612) show a similar level to last year's (4,661), only a 1% drop, and just a 2.9% drop at WestQuay Shopmobility. At WestQuay Shopmobility, there appeared to be no difference in the spread of use over the week compared to previous years, apart from Saturday becoming less popular, and the mid-week period again appearing high in demand.

Accessibility generally in the city centre is aided by raising bus kerbs to give better access to the new low-floor buses and the provision of tactile crossings for people with visual impairments. 40 shops from the first round of accessibility audits in 2000 were re-audited by Southampton Action for Access (SAFA) in 2004, as well as almost a further 100 up to the end of the 2004/05 period. The access guide now has over 200 businesses on it as well as some other public locations, and 134 city council services. These audits are carried out now in conjunction with WestQuay Shopmobility as well as City Shopmobility and are ongoing. SAFA's website provides all the information gathered from the audits. This gives free publicity and hence the incentive to participate in the surveys. With new legislation in force from 1 October to cover Disability Access compliance, this now affects all businesses.

Car park availability

The multi-storey and surface car parks (managed by Southampton City Council unless otherwise indicated) within the city centre are:

Transport map ref.	Car parks	Number of spaces 2004/05
MULTI STOREY CAR PARKS		
1	Bargate Shopping Centre (private)	220
2	WestQuay Multi-Storey (private)	2500
3	WestQuay Podium (private)	1500
4	Marlands	810
5	Eastgate Street	713
6	Portland Terrace (private)	605
7	Grosvenor Square	540
8	West Park Road weekends weekdays	510 200
9	Salisbury Street	300
TOTAL (weekend numbers)		7698
SURFACE CAR PARKS		
10	West Quay Retail Park (private)	693
11	Toys 'R' Us (private)	310
12	The Quays (North)	140
13	Civic Centre f/court (w/ends only)	71
14	Castle Way	68
15	Guildhall weekends weekdays	66 26
16	Albion Place	52
17	Wyndham Place	24
18	Commercial Road	10
19	Bargate Street	*17
20	Mayflower Park	233
21	Lime Street	226
22	Southbrook Road	113
23	Gloucester Square	100
24	Grosvenor Square (North)	91
25	The Quays (South)	90
26	NCP Back of the Walls (private)	76
27	Harbour Parade	56
28	Leisure World (private)	885
29	Kings Park Road	74
TOTAL (weekend numbers)		3395
GRAND TOTAL (weekend numbers)		11093

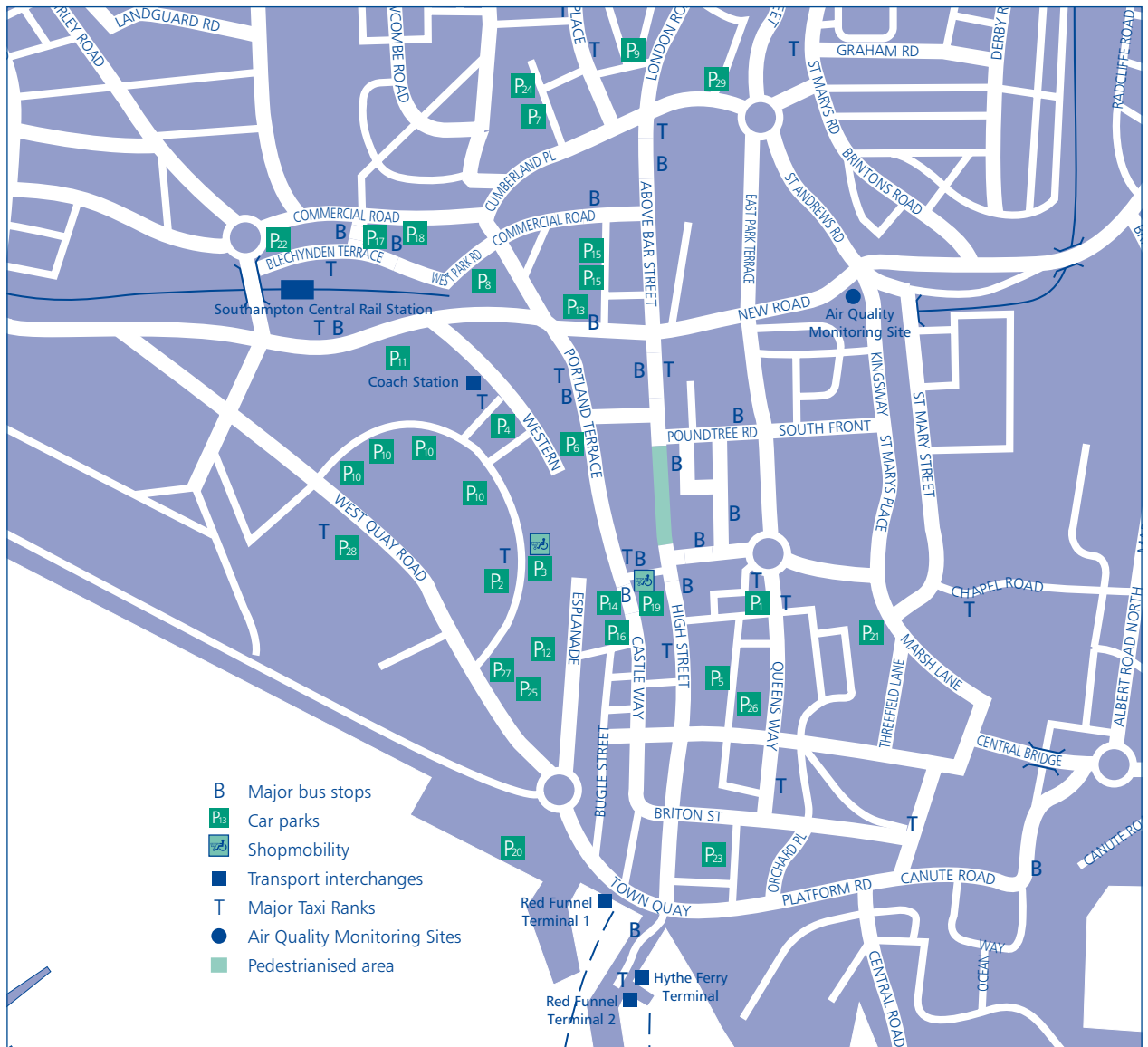
* Shopmobility users only

Source: SCC Parking Services/CCTV Unit

Over the past year, there has been no change in car parking spaces, although 80 new spaces will become available early in the 2005/06 period upon completion of the Charlotte Place development. During the year Grosvenor Square multi-storey car park underwent major refurbishment, including complete rewiring, waterproofing the car decks, repairs to concrete and repainting.

There are also over 700 on-street parking spaces in Southampton city centre, for parking from one to four hours, with charges applying every day of the week except Christmas Day and Easter Sunday. Season tickets are available for one, three, six or 12 months for use in general purpose city council car parks. Limited coach parking is available in on-street bays at Blechynden Terrace, close to The Mayflower theatre, with drop off and pick up points available at Harbour Parade and by prior arrangement at the National Express Coach Station on Harbour Parade. During the year, the new City Loop free bus service commenced, connecting Grosvenor Square and Salisbury Street car parks to the Royal South Hants Hospital, Southampton Institute and the city centre, running every 20 minutes between 0800 and 1820.

The locations of the parking facilities are illustrated on the following Transport Map. Other previously mentioned transport facilities are also highlighted.



Source: Southampton City Council

The city council multi-storey car parks (Marlands, Eastgate Street, Grosvenor Square and West Park) have all been awarded the 'secured car parks' certificate for the eighth year running, with WestQuay car parks also achieving the same certificate. The certificate is issued by the Association of Chief Police Officers, promoted by national government and administered by the Automobile Association and the British Parking Association.

Car park capacity

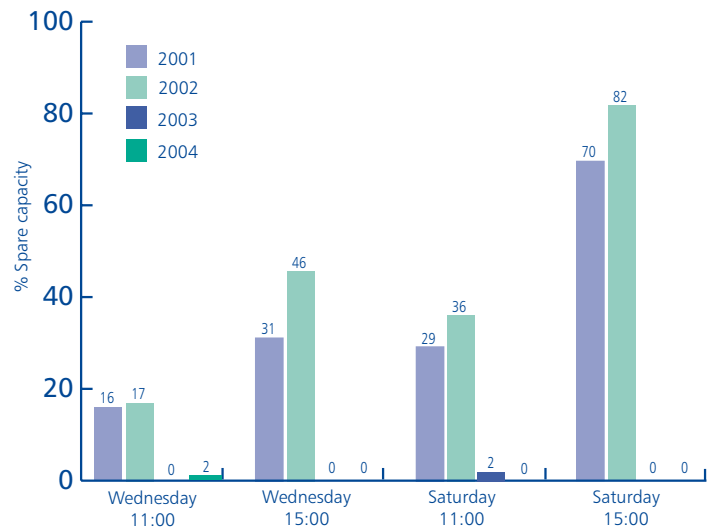
The level of spare capacity in two city council run multi-story car parks (Marlands and Eastgate Street), the NCP Car Park on Portland Terrace and the WestQuay Multi-Storey and Podium car parks has been calculated at four comparable points in time in December over each of the past four years. These figures are shown on the following graphs. WestQuay Podium car park had no available data for 2003 and therefore the average figures represent averages of data available.

The most striking change in 2003/04 was that NCP Portland Terrace had virtually no spare capacity at all surveyed times whether weekday or weekend, and this was a major change from the year before where there was 80% capacity on Saturday afternoons. This pattern has continued in 2004/05 so that there is virtually no spare capacity at all surveyed points. Marlands car park has appeared to get busier in the mornings but less so in the afternoons compared to last year, but is generally less busy during the week with about a third to a half spare capacity, with little spare capacity at weekends. Eastgate Street is also at full capacity at the weekend survey points and has little spare capacity during the week (10-20%). WestQuay's Multi-Storey car park shows similar levels to last year, being busier at weekends with about 15% spare capacity compared to about 60% during the week. The WestQuay Podium car park had no data available last year but shows similar levels to 2002 in the afternoon periods, and is now busier in the mornings. It is busy throughout the week, but less so at the Wednesday afternoon survey point. The levels in 2004 and 2002 are greatly reduced from 2001 and appear to generally indicate, as would be expected, busier patterns at weekends, but also in the mornings.

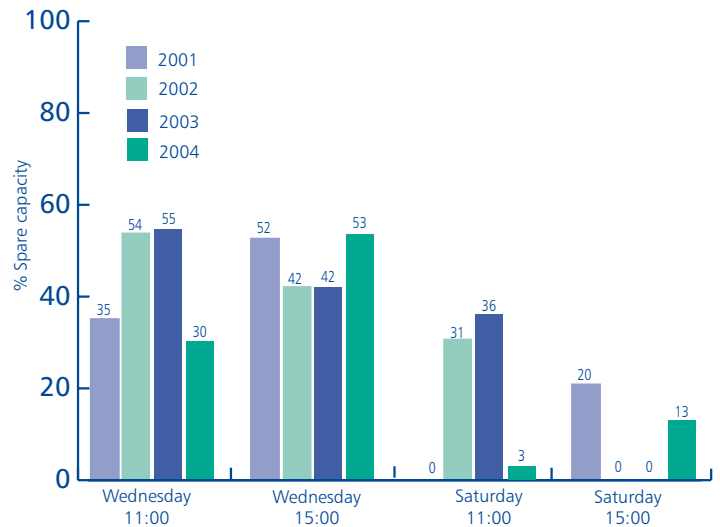
The final graph indicates the average spare capacity for the five surveyed car parks where data was available, and this has consistently dropped. In 2001, the average was just under 50%, falling to 32% in 2002, 20% in 2003 and now just 18%. This corroborates the trend that was highlighted last year. On examining differing numbers and averages over different car parks, it is clear that there has been a significant fall in the amount of spare capacity in the city's surveyed car parks, and this is still falling, albeit not as quickly as over the previous year.

There is an increasingly high number of occurrences of a lack of capacity in the city's car parks, leaving little spare capacity for peaks such as the Boat Show and Christmas, and causing more vehicle movements as people try to find spaces elsewhere. Park and ride operates in the city during the Boat Show, and this was highlighted last year as one possible future solution throughout the year.

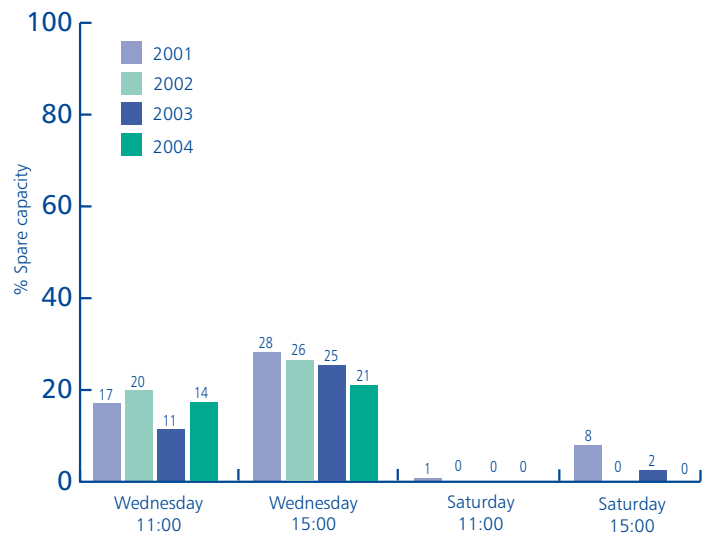
NCP Portland Terrace car park spare capacity (605 spaces)



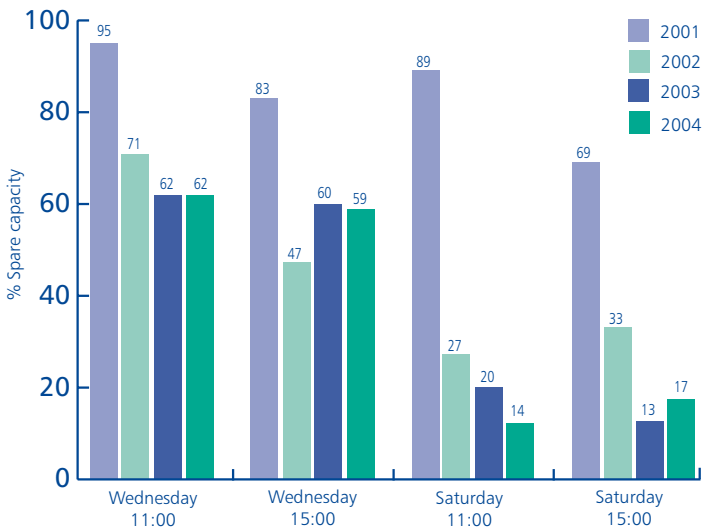
Marlands car park spare capacity (810 spaces)



Eastgate Street car park spare capacity (713 spaces)



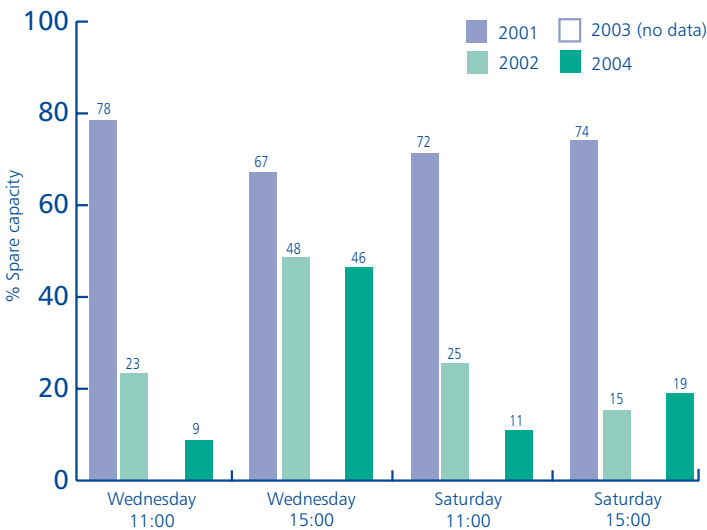
WestQuay Multi-Storey spare capacity (2,500 spaces)



These results reflect a similar situation to 1998 when, prior to the opening of WestQuay, the capacity of the city's car parks was also being stretched, with an average spare capacity of only about 5% for the surveyed car parks. The addition of the extra 4,000 spaces as a result of the WestQuay development did increase the availability of parking, but it appears that this too is now being filled.

Whilst Charlotte Place will re-provide 80 spaces, there is a need to address this issue in order that the development of the city centre is not stifled. Government guidance seeks to reduce the use of the private motor vehicle, and it is clear that other alternatives need to be urgently examined.

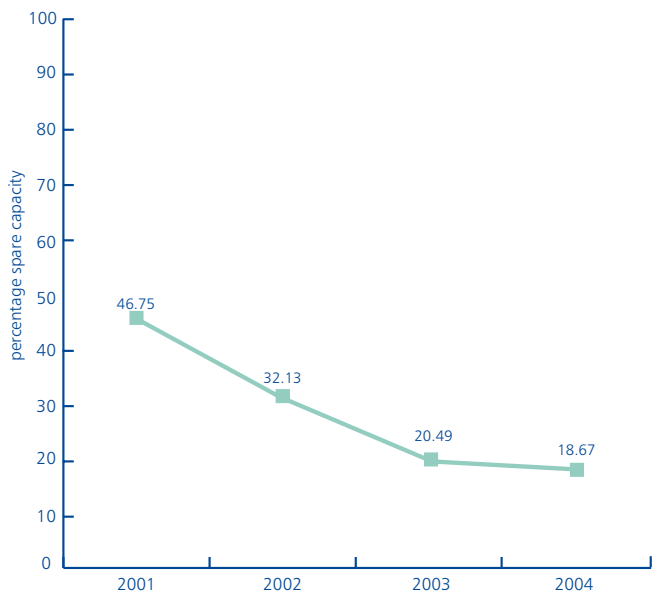
WestQuay Podium car park spare capacity (1,500 spaces)



Parking for disabled people

With the exception of barrier controlled car parks, disabled people displaying a valid blue badge can park free of charge in all Southampton City Council surface car parks, in West Park multi-storey, and at a number of on-street parking bays. There are also over 100 designated disabled on-street bays and clearly marked designated parking for people with disabilities at several car parks including WestQuay Podium and Multi-Storey, WestQuay Retail Park and Toys'R'Us. Bargate Street car park is specifically for users of the City Shopmobility scheme with 17 spaces, whilst 14 specific spaces in WestQuay car park are designated for users of the WestQuay Shopmobility scheme.

Average spare capacity for all car parks



Average taken from data available

As a measure of vitality and viability, '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. The data presented here is for the city centre's main retail core**, rather than the complete health check area.

Land-uses

	Use	Units (2003 in brackets)	Sq metres 2004	% of total sq m 2004	Change in sq m 2004	% Change in sq m 2003-2004	% Change in share of sq m
A1*	Convenience	20 (19)	13,178	3.18	254	1.97	0.06
	Durables	292 (291)	212,253	51.17	-2,279	-1.06	-0.55
	Services	57 (44)	12,428	3.00	1,732	16.19	0.42
A2	Financial services (counter services)	75 (77)	30,426	7.34	325	1.08	0.08
A3	Food & drink	96 (87)	36,736	8.86	-980	-2.60	-0.24
C1	Hotels and hostels	2 (2)	6,518	1.57	-682	-9.47	-0.16
C3	Dwellings	118 (84)	9,448	2.28	1,836	24.12	0.44
D1	Non-residential institutions (inc. education)	12 (11)	22,774	5.49	256	1.14	0.06
D2	Assembly and leisure (inc. cinemas, theatres)	11 (10)	21,500	5.18	447	2.12	0.11
	Vacant offices	15 (18)	4,269	1.03	-845	-16.52	-0.20
	Vacant retail	61 (76)	41,088	9.91	497	1.22	0.12
	Vacant residential	4 (0)	3,310	0.80	3,310	N/A	0.80
	Vacant other	4 (14)	850	0.20	-3,871	-82.00	-0.93
	TOTAL	767 (733)	414,778	100.00	0	0.00	0.00

*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.

B1 Business has been deleted from both the 2003 and 2004 data as the only unit contributing was on Ogle Road and this street has been removed from the survey

Source: Southampton City Centre Management

**The Land Uses survey covered the following streets:

Above Bar, Asda & concourse, Bargate Shopping Centre, Bargate Street, Castle Way (part), Civic Centre Road, East Bargate, East Street, East Street Centre, Gibbs Road, Hanover Buildings, The Strand, High Street (part), The Mall Marlands, Portland Street, Portland Terrace, Pound Tree Road, Queensway (part), Sussex Road, Vincents Walk, West Bargate, West Marlands Road, West Quay, West Quay Retail Park, Windsor Terrace, York Walk.

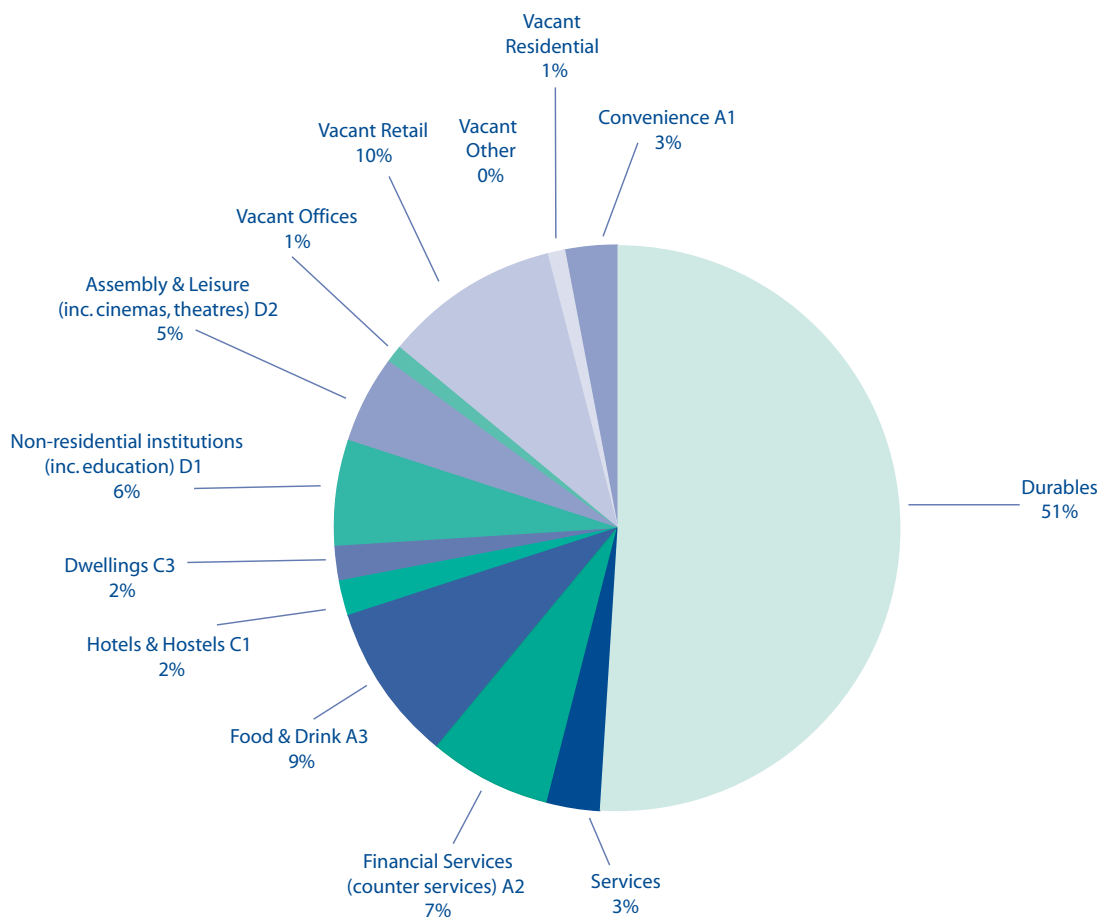
There is no change since last year in the survey area’s floorspace (414,778 sqm), although there is a change in how this is spread between uses, and an increase in the number of units it is divided into.

There has been an increase in the number of A1 Service outlets and floorspace. This is accounted for by several vacant retail units opening under this use class and two new units being provided through subdivision. Other than this, the shift in floorspace has been mainly as a result of a large fall in the amount of vacant offices and other vacant floorspace, due in part to the conversion of these into residential use at Portland Terrace and Hanover Buildings.

These conversions to residential use have resulted in subdivisions and the number of units increasing from 733 to 767 (a rise of 34), with 3 office units having been converted into 15 residential units at Portland Terrace, and vacant education and training floorspace having been converted into 20 residential units at Hanover Buildings. Indeed, this replacement by residential units could explain the rise in the number of such vacant residential units as these come on the market, not to mention the rise in residential dwelling units and floorspace itself. The other area accounting for this shift in floorspace share and increase in number of units is at Dolphin Lane, at the Dolphin Hotel, where some of the hotel floorspace has been converted into retail (A1) and food and drink units.

Despite all of this, the make-up of the land-use mix is fairly constant given that retailers of durable goods are still the major players in Southampton’s land use mix (51%), with food & drink (9%) and financial services (7%) forming the other major components. Despite the rise, dwellings still only represent 2% of floorspace, but this is only within the tightly defined city centre retail core. The final main component in the floorspace share is vacant retail, which still stands at 10%, but whilst the floorspace accounted for is similar to last year, the number of units has fallen. Other vacant use types represent a minimal and smaller share of the city’s overall floorspace. Central Government acknowledges that vacant units can arise even in the strongest town centres, as in many cases these premises are vacant whilst they are being refurbished. This assessment therefore shows a healthy and lively picture.

Percentage share of total floor space



Source: Southampton City Centre Management

General performance

From a league table of over 1,100 retail centres in the United Kingdom and over a third of a million UK retail outlets, produced by Experian in 2004 (surveyed 2003), Southampton was ranked as 7th for 2003/04. The rankings were based upon a number of weighted key performance indicators including the numbers of multiple retailer outlets, comparison and quality independent retailers, the amount of vacant floorspace or retailers vulnerable to supermarket competition and e-tailing. Southampton's position then, compared to some of its competitors, is shown below. Experian have not updated this survey for 2004/05.

Retail centre ranking - selected towns/cities

	2001/02	2002/03	2003/04
Nottingham	4	4	5
Southampton	7	7	7
Cardiff	6	6	8
Norwich	8	9	9
Reading	9	8	12
Edinburgh	12	14	16
Kingston upon Thames	13	12	17
Brighton	23	21	18
Guildford	16	17	21
Bristol	20	20	24
Basingstoke	140	31	34
Portsmouth	91	n/a	n/a
Winchester	145	n/a	n/a
Bournemouth	155	n/a	n/a

Source: Experian Ltd

On the evidence of the previous surveys, Southampton had maintained its position in this league table, staying at a constant seventh place over the previous three years. Of the selected cities, Brighton and Basingstoke are the only two to have risen, with all the other competitors witnessing small falls in position. Southampton has once again emphasised its position as the leading retail centre south of London.

Southampton's position at this level in the league table resulted from the opening of WestQuay shopping centre in 2000. As Southampton is the top ranked retail centre in the southeast, above Reading (12) and Bluewater (10), it has made a great achievement, since retail attractiveness has consistently clustered in the southeast with five centres now in the top 20. The continued dominance by Southampton dispels fears that areas that see an unprecedented rise in popularity following regeneration will quickly start to fall back down the rankings.

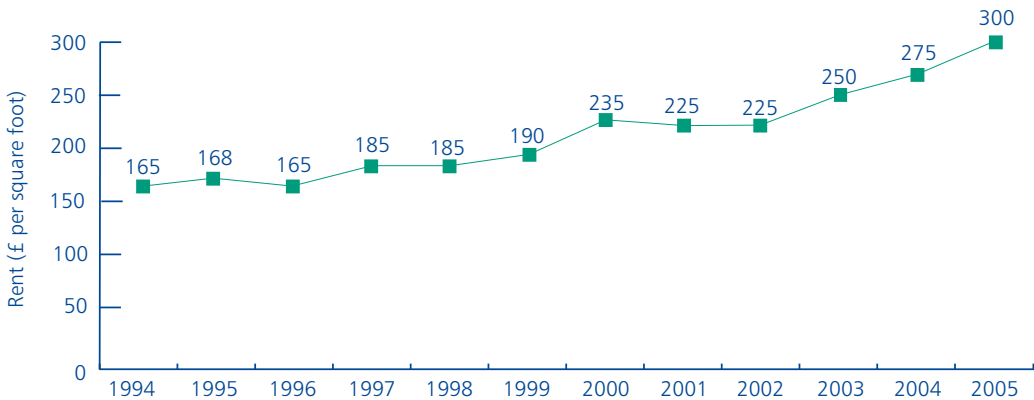
Basingstoke made a huge leap from 140 to 31 in 2002/03 following major developments. Whilst Southampton's competitors are on a national rather than regional level, this rise in Basingstoke's fortunes was closely observed. However, it appears that Basingstoke, as with Southampton, has found its relative position, but this should still be monitored in the future.

In addition to this, in the same year, a national survey undertaken by Prime Retail into opinion in the retail trade singled out WestQuay for special mention, and Southampton was cited as having the UK's best car parking facilities.

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.

Southampton Zone A retail rents 1994-2005

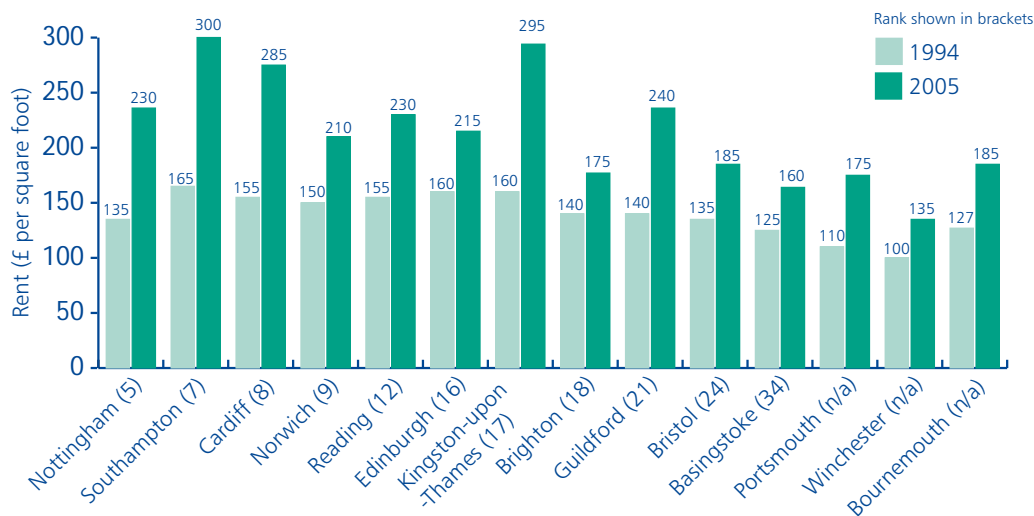


Source: Colliers CRE

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 over the last decade. It should be noted that rents reflect the tone of the market for the best property in the best pitch but not necessarily the highest rent agreed in the city centre. The exact definition of the best pitch may change over time due to new developments, improvements and retailer movement.

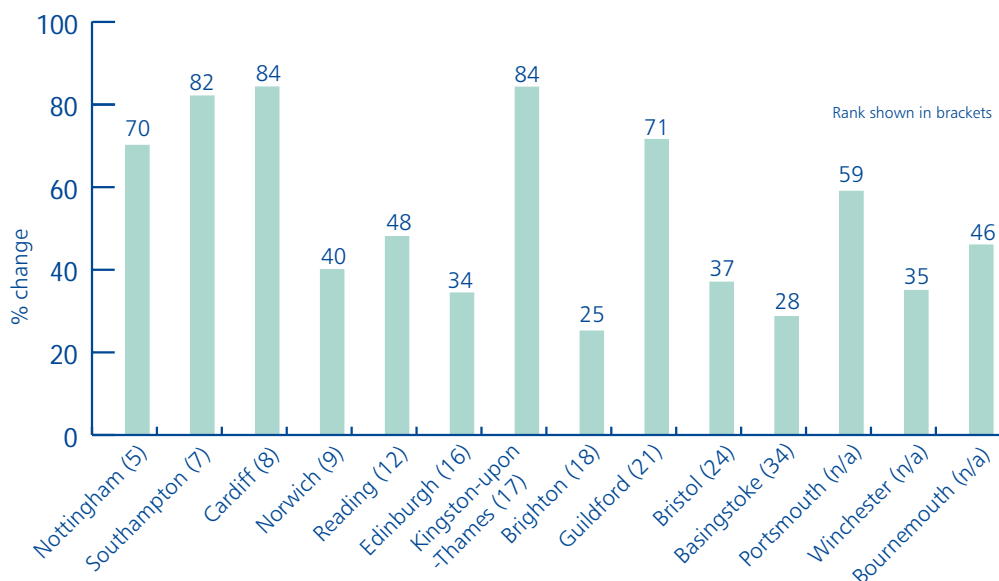
Whilst Southampton's figures remained fairly constant throughout the early to mid 1990s, they started rising sharply in the second half of the decade. It was at this time in early 1995 that the first City Centre Manager in Southampton was appointed. There was then a further dramatic rise in 1999/2000, corresponding to the opening of WestQuay shopping centre. Whilst rents then dropped slightly below their 1999/2000 level, they are now at their highest level of £300 per square foot, having been increasing consistently since 2002.

Zone A retail rents 1994 & 2005



Source: Colliers CRE

Change in Zone A retail rents since 1994



Source: Colliers CRE

Rental figures for selected centres have been monitored since 1994. Over this period Southampton's rents compared to these selected centres

- began higher than the other centres, and this relative position has been retained,
- have increased faster than many of the other selected centres and have seen similar increases to Nottingham, Cardiff, Kingston-upon-Thames and Guildford,
- are now higher than all these selected centres, including now rising above Kingston-upon-Thames, and
- are considerably higher than any other centres in the region, with rents hitting the £300 per square foot level, and others being closer to, or below, £200 per square foot.

This, not only helps to confirm Southampton's supremacy in the regional arena, but also its importance in the wider geographical sphere.

Retail Sales Trends

It has become increasingly difficult to obtain retail sales for multiple retailers in the core retail area of Southampton city centre, and therefore this data comparison has been discontinued.

There have been no significant changes in these figures over the last four years, except in the number of restaurants/coffee bars/fast food and take-aways, which has increased by almost 20% over the past year. This is evidence of the wider provision of more diverse uses in the retail core that the council is keen to encourage.

The **Southampton Central Parks** enhance the city centre, by providing a vast green open space in the heart of the city. The parks were returned to their full Victorian glory following a £4.5million refurbishment and enhancement scheme in 2000/01, funded by the Lottery Heritage Fund and the city council. The effort to maintain these areas is ongoing and provides Southampton with the image of a green city. Park walks take place throughout the year focusing on a variety of topics including summer bedding, monuments and archaeology. Concerts and events also included bands playing at the bandstand in East Park. During the year an alcohol free zone in terms of public drinking was declared in the parks, and the city centre between High Street and Bedford Place, to discourage anti-social behaviour, and regular patrolling of the parks now takes place.

Throughout the year the city centre and the adjacent areas hosted a variety of **annual events** including the Southampton Boat Show (Mayflower Park) in September.

In addition to this, there are various **performance venues** within the city, the largest and most well-known of these being The Mayflower theatre. In 2004/05 The Mayflower experienced one of its best years ever, with a 29% rise in attendance, and an average attendance per performance of over 1350.

Attendance at The Mayflower 2000-2005

	2000/2001	2001/2002	2002/2003	2003/2004	2004/2005
Attendance	405,461	369,934	465,662	344,919	445,037
		-8.76%	+25.88%	-25.93%	+29.03%
No of Performances	332	312	376	254	329
Average Attendance	1,221	1,186	1,238	1,358	1,353

Source: The Mayflower Theatre

In terms of shows, the biggest sellers were Peter Pan, Cats, Chicago and Grease, whilst Rebecca starring Nigel Havers achieved record UK box office takings for a play. As well as performances, 2,150 people attended conferences and corporate events in 2004/05. In the course of the year, a lift was completed at a cost of £300,000 to improve access for people in wheelchairs to the higher levels of the theatre. Linking with education in the city, the trust which runs The Mayflower, contributed £10,000 towards Oaklands School becoming a specialist performing arts school.

Culture

Cultural facilities within the Health Check area include the Central Library, the Art Gallery and several museums.

The Culture & Leisure Map 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 which forms part of the longest stretch of medieval town walls in the country and provides an historical setting for shoppers and visitors alike.

Plans for the development of this area of the city - **'The Old Town'** - were unveiled by the city council in summer 2002 and one of the main thrusts was the re-use of the many historic structures. Over the past year, the Bargate Monument has been used to house exhibitions and theatrical displays. It is now being used as a base for A-Space, the organisation that provides an "Arts in the Vaults" project each year for up and coming local artists.

In 2004/05 the number of visitors to the **Central Library** almost tripled from just over 0.5million to just under 1.4million, an increase of almost 1million compared to last year's increase of about 70,000 and a drop of about 10,000 in 2002/03. In addition to this, 185,000 enquiries were dealt with and the equivalent of 5,900 days of computer time was used by 263,000 people. Library users are now able to join, search the library catalogue, and renew and reserve materials online.

Learn Direct was launched at the library in October 2003 and has had over 500 learners registered, and this, amongst other factors such as increased computer use, has contributed towards the major growth in library visitors. The Central Library also includes a Business Library and works in concert with the European Information Centre, acting as the Southern Area's European Information Centre. Remodelling work undertaken in the reception area of the Central Library over the 2004/05 year included a new security system to improve accessibility to the building.

Southampton City Art Gallery is the most outstanding gallery in the South of England and is internationally renowned for its impressive collection and temporary exhibitions programme. The works on display, of both historic and contemporary art, show the breadth and quality of the city's art treasures and are housed within a beautiful example of 1930's municipal architecture.

Over the year several new exhibitions opened, including one of costume through the ages and several related to World Wars I and II, with the great grandson of Sir Winston Churchill opening one of these. Visitor figures saw a 14% increase compared to the previous year, which is mainly attributed to good coverage in the national and local press of the various exhibitions. One, the Walter Sickert exhibition, was listed in the top 5 national exhibitions to see in all the broadsheet papers.

Visitors to Southampton City Art Gallery

2001/2002	2002/2003	2003/2004	2004/2005
43,168	45,969	49,385	56,402
	+6.5%	+7.4%	+14.2%

Source: Southampton City Art Gallery

As well as exhibitions, new acquisitions to the Gallery's collection were made with grants and gifts. The year saw the launch of the David and Liza Brown Bequest Fund for Southampton Central Art Gallery at the National Art Collections Fund Headquarters in London. This provides a capital fund of £180,000 for the purchase of works of art for the permanent collection.

As well as this, the Art Gallery reaches out externally and abroad through lending schemes with other exhibitions and through the Gallery's Art Lease and Art4Schools schemes. Building on this, the Art Gallery Education Service reached a new monthly record of 1,310 visits by school students in organised visits in June, including a number of new client schools that had not previously used the Gallery. Gallery shop sales increased by 38% from the previous year, due to the sale of new products such as framed print reproductions.

Overall, it has been a highly successful year for one of the city's key treasures, and whilst it has been suggested that awareness of collections needs to be raised amongst local citizens, piloting of a new market research tool collating visitor surveys in the Art Gallery has shown an 80% satisfaction index being achieved.

There are also several **museums** within the Health Check area. The following table shows attendance figures for these. Tudor House Museum closed for long-term restoration at the end of April 2002, but is open for organised tours, can be visited by arrangement and occasionally the gardens are opened for wedding photos. The £2.3million restoration works of this 500 year old building should take an estimated three years to complete. The Maritime Museum's increase in numbers, whilst being part of a general trend, may have been assisted by events involving the QEII and the Queen Mary 2. The Museum of Archaeology at God's House Tower's figures could have fallen because for much of last year there was no Exhibition Officer or Education Officer in post.

Visitors to major Southampton City Council museums

	2000/2001	2001/2002	2002/2003	2003/2004	2004/2005
Maritime Museum	39,306	34,305	37,594	43,820	50,509
Tudor House Museum	32,389	30,589	2,663	N/A	N/A
Museum of Archaeology	8,277	1,663	9,910	10,108	8,940
Total	79,972	66,557	50,167	53,928	59,449

Source: SCC Historic Site Management

The city council are examining a proposal to rationalise certain museums and provide a new heritage centre for Southampton.

Crime statistics

The Health Check aims to provide an indication of how crime is being tackled in the city centre. Within the Health Check boundary, the crimes listed below were recorded.

	2003	2004	% Change	% of Total in 2004 (2003 %)
Violence against the person	969	859	-11.4	15.9 (19.3)
Burglary - dwelling	18	13	-27.8	0.2 (0.4)
Burglary - non-dwelling	145	204	40.7	3.8 (2.9)
Theft of vehicle	55	35	-36.4	0.6 (1.1)
Theft of pedal cycle	91	130	42.9	2.4 (1.8)
Theft from vehicle	273	228	-16.5	4.2 (5.4)
Shop theft	1,161	1,114	-4.0	20.7 (23.2)
Robbery	53	72	35.8	1.3 (1.0)
Theft from the person	213	217	1.9	4.0 (4.3)
Other theft	778	815	4.8	15.1 (15.5)
Fraud & deception	369	608	64.8	11.3 (7.4)
Sex offences	34	55	61.8	1.0 (0.7)
Criminal damage	395	377	-4.6	7.0 (7.9)
Other crimes	456	667	46.3	12.4 (9.1)
All crimes	5,010	5,394	7.7	100.0 (100.0)

Source: SCC Community Safety Team

Due to changes in the National Crime Recording Statistics, the way in which the police record violence changed in 2002. As a result, there has been improved recording of incidents, and so an increase in incidents does not necessarily mean an absolute rise in the number of incidents. As the changes to the recording were introduced in 2002, the implications of the changes are still impacting on the figures and realistic trends are only just beginning to be identifiable. This will need monitoring in the years to come.

There has been a 7.7% increase in the number of crimes recorded within the city centre, which compared to last year's rate of increase of 22%, is a marked improvement and perhaps suggests the recording system is starting to settle down.

Over the past year, it appears that theft of and from vehicles has decreased as have dwelling burglaries, all of which either increased last year or did not fall as steeply. Violence against the person has also dropped this year compared to last year's rise. However, this could be offset by the inclusion of public order offences under the tag 'other crimes', where 350 of the 667 recorded other crimes were for public order offences.

Nevertheless, there appears to have been increases in sex offences, non-dwelling burglaries, pedal cycle theft and robbery. It is important to note the actual numbers and level of change rather than pure percentages as some are the result of relatively small increases in the number of crimes, such as sex offences. Disappointingly, last year it was reported that fraud and deception had seen a fall in the rate of increase from 36.1% to just 3.1%, but this year it appears to have risen once more to 64.8%, an even higher rate than two years ago.

It appears that what was improving last year has worsened this year and vice versa, and whether this is a direct result of short term concentration of efforts on one particular crime could be examined. However, generally the picture is showing a lower rate of rise in crime.

There has been little alteration in the relative importance of the different types of crime, with shop theft remaining the most frequent crime reported, accounting for a fifth of all crimes. Thieves walking into staff rooms and locker rooms in stores has been particularly prevalent. Violence against the person, which was the second highest in percentage terms last year, has seen a drop in percentage share. Conversely, other crimes (possibly due to the reasoning above) and fraud and deception have increased the most in share. This all potentially supports the theory of short term reactions. Burglary dwelling, theft of a vehicle and sex offences have the lowest percentage share of all crimes, with none higher than 1.0%

Safety and Security Initiatives

Southampton Community Safety Strategy

The Southampton Safe City Partnership launched the latest 2005-08 Community Safety Strategy at the end of the period. It contained five main themes including reducing crime rates, reducing problematic substance misuse and tackling anti-social behaviour. Contained with the related action plans, specific measures were to be aimed at the city centre and in particular tackling alcohol related violence in the night-time economy. It is possible that the Restricted Drinking Area may be extended throughout the city centre, whilst at the same time there are a number of proposals aimed at making the city centre a safer and thus more attractive venue for all age groups to visit at night.

CCTV

The city council utilise a new CCTV control room that was completed last year and provides state-of-the-art equipment. This 3,000 sq ft facility can control 600 cameras, and also has a dedicated tape review suite and an extensive data library. Police use of the review suite for information gathering increased by 37% to 723 visits, whilst tapes seized or copied to support police investigations and prosecutions increased by 100% to 868. At the end of March 2005 there were 303 closed-circuit television cameras (CCTVs), monitored 24 hours a day, in operation throughout the city, comprising of 54 in the central area, 158 in the council run multi-storey car parks and 59 ROMANSE cameras.

Arrests and incidents related to CCTV operations are shown below. Whilst the figures cover all CCTV cameras within the city, the majority of these crimes were committed in the central shopping area. Of the 1,523 crimes, there were 1,217 incidents in the city centre (about 80%) and police detainments from CCTV recorded incidents increased by 7%.

Incidents and arrests involving Southampton City Council CCTV since 2000

	2000	2001	2002	2003	2004
Theft	287	276	268	270	323
Drunkenness	91	123	89	59	90
Damage	54	64	71	67	79
Anti-Social Behaviour	182	183	158	92	134
Public Order / Assault	207	283	302	280	431
Suspicious Behaviour	159	132	101	48	90
Drugs	14	22	13	18	37
Traffic	79	94	116	69	134
Burglary (Commercial)	12	7	4	7	9
Vehicle Crime	15	19	21	8	14
Graffiti	3	5	5	3	3
Missing Person	28	33	51	8	14
Other	163	165	176	131	165
Total	1,294	1,406	1,375	1,060	1,523
% Change		+9.0%	-2.0%	-22.9%	+43.7%

Source: Southampton City Council CCTV

The most frequent crimes where CCTV is involved within the city council's network are public order/assault (28.3%), theft (21.2%) and anti-social behaviour and traffic incidents (both 8.8%). These percentages have showed little change, apart from traffic incidents having risen in percentage terms. With regard to the absolute number of incidents and arrests using CCTV, most have shown an increase, reflecting the large increase in the total. However, as with the crime figures the absolute numbers reflect a number of changes including an increase in the number of cameras, such as at Salisbury Street car park, reclassification of incidents, and the number of patrols increasing; it does not mean that levels of crime have increased, but illustrates that CCTV is being increasingly used in the fight against crime.

The above figures include the CCTV cameras that are also in place within the four city council run multi-storey car parks in the city centre (Marlands, Eastgate Street, Grosvenor Square and West Park). Around 1.25 million vehicles use these car parks each year. Data relating to crime levels within the car parks indicated a significant decrease when CCTV was introduced and this has continued over subsequent years, showing considerable success in the deterrent they provide. Figures for the full 2004/05 year are unavailable but the previous trend is quite clear and has shown no sign of abating.

Theft of/from motor vehicles in Southampton City Council multi-storey car parks up to 2003/04

	1997/98	1998/99	1999/00	2000/01	2001/02	2002/03	2003/04
Theft of Motor Vehicles	29	4	0	0	0	1	0*
Theft from Motor Vehicles	177	20	17	3	2	3	2

(*1 unsuccessful)

Source: SCC Parking Services/CCTV Unit

All these city council multi-storey car parks have been awarded the 'secured car parks' certificate for the eighth year running, with WestQuay car parks also achieving the same certificate. The certificate is issued by the Association of Chief Police Officers, promoted by national government and administered by the Automobile Association and the British Parking Association.

Business Crime Reduction Initiative (Retail Radio Link)

Initiatives in the past to reduce shoplifting and retail crime included a Retail Radio Link between shops, which had over 70 stores on the link. Work has taken place over the year to modernise and upgrade the system and from April 2005 a Business Crime Reduction Manager will be employed.

City Patrol

The City Patrol team works through enforcement, evidence gathering and reassurance, to address issues of anti-social behaviour and nuisance throughout Southampton, including the city centre. The team works from 8am to 11pm seven days a week and patrols the city in vans, on foot or by cycling. The officers wear distinctive uniform, with city council identification and are accredited by Hampshire Constabulary.

Southampton Licensing Link

Introduced in October 2000 this partnership comprises of public houses, nightclubs, the police and the city council. Its aims are to enable licensed premises to communicate with one another and thus be more aware of the current or ongoing problems around the city. At the present time the Link has 50 members. Licensing Link meets on a regular basis in order that the members can share, and be updated with, current information.

Student Safe Southampton Initiative

This is a partnership between Hampshire Constabulary, the city council, the Community Safety Partnership and City Centre Management. A map and booklet is produced, aimed at overseas students, to highlight places of safety in the city centre. This includes high street retailers and restaurants who have signed up as safe havens where students can go if they need help or assistance.

Police Cycle Team

City police have a tactical cycle team consisting of a sergeant, five constables and five part-time specials, who will respond to incidents on mountain bikes and go out on directed patrol in the city centre. This team has been increased with the addition of eight more bikes supported by Southampton City Council. The new teams, whilst operating from Bitterne and Shirley, will, from time to time, act as support in other areas, including the city centre.

Pedlars

As Above Bar pedestrian precinct is so busy, the last few years have seen a large number of pedlars operate under an ancient law using a pedlar's certificate allowing them to trade as they travel, but not to set up a stall. City Centre Management, in partnership with the police and city council, regularly mounts operations to monitor the illegal peddling activities and prosecute where appropriate. At Christmas, one operation saw nine pedlars have their merchandise confiscated and summons issued. Of the nine defendants, eight were convicted with total fines of £1,500 and costs of £1,200. One case was adjourned.

Street beggars

Southampton's Police in conjunction with City Centre Management, the city council's City Safety Team, the Rough Sleepers Initiative and the Drugs Referral Team have been involved in an ongoing initiative to remove beggars from the city centre's main shopping streets. The beggars are offered access to drug rehabilitation services and assistance with locating accommodation, with any found to be genuinely homeless being offered assistance through the Rough Sleepers Initiative run by Southampton Voluntary Services. This initiative resulted in a noticeable reduction in the number of beggars in the core city centre, helping to reassure the public and provide an increased sense of safety for all those using the city centre. However, the reality is that many have simply moved to the car parks and night time economy areas, such as London Road, in the evenings.

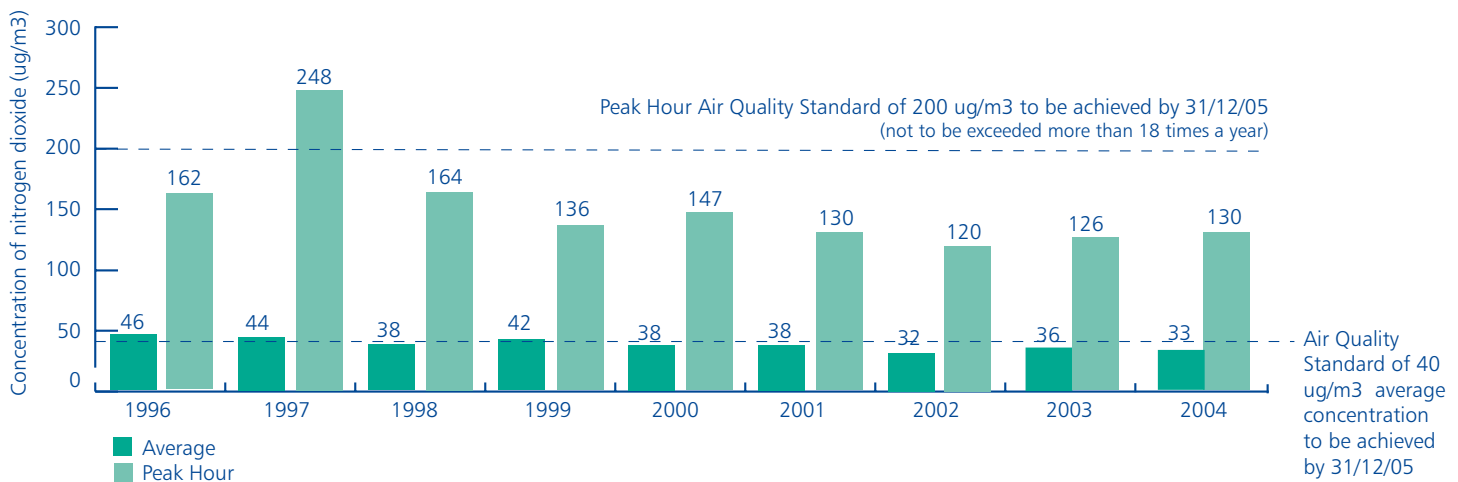
Environmental quality is an indicator of the level of attractiveness, comfort and enjoyment that has been achieved in the city centre.

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

Pollution

A permanent Department for Environment, Food and Rural Affairs (DEFRA) automatic urban network monitoring station operates at Six Dials, a major junction at the periphery of the city centre (Brintons Road/Northam Road) used by approximately 38,000 vehicles per day and experiencing some congestion during peak hours, and close to a residential area.

Average and peak hour nitrogen dioxide concentration in Southampton city centre (ug/m³)



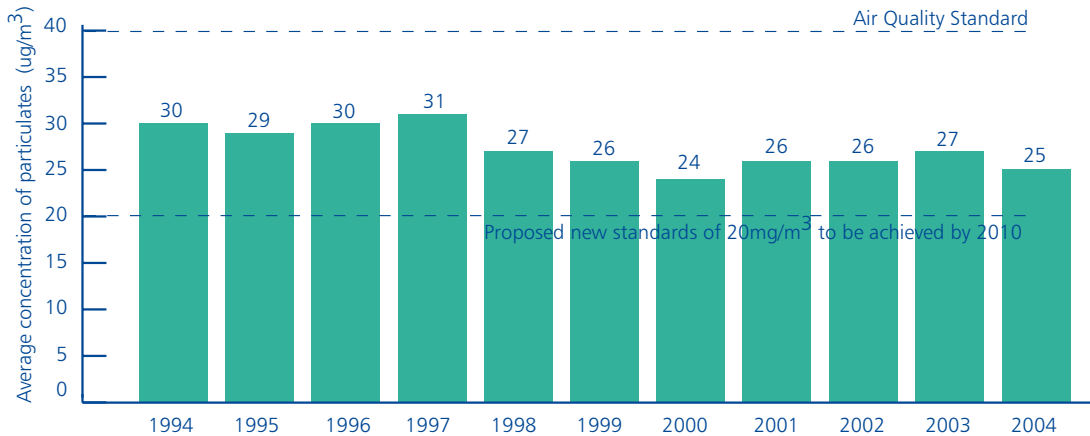
Source: Southampton City Council

This year the nitrogen dioxide concentrations are shown in ug/m³ as opposed to parts per billion as in previous years. The average has dropped once again back towards the low level witnessed in 2002 at

33ug/m³ for 2004, comfortably within the quality standard of 40ug/m³. There has only ever been one

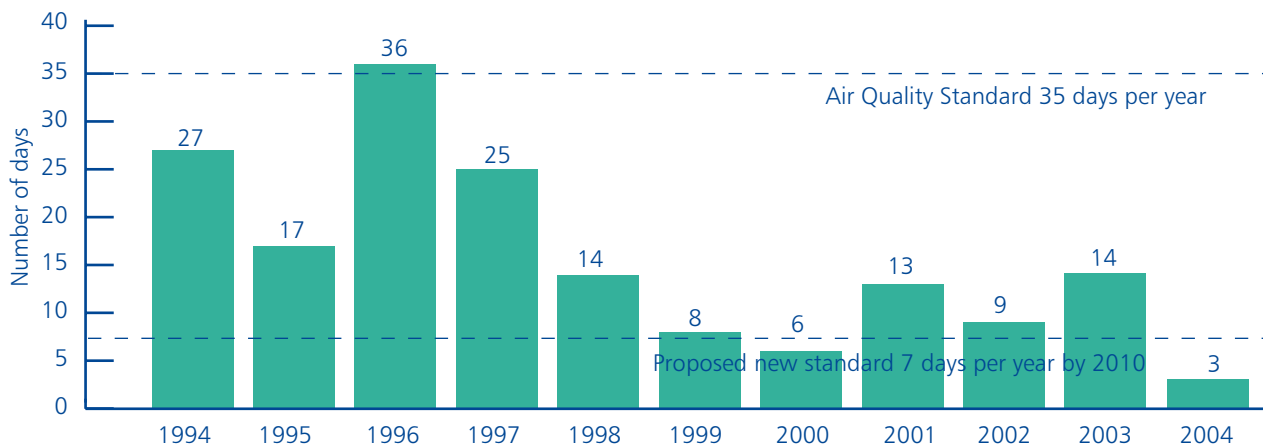
exceedance of the 20ug/m³ peak hour air quality standard (in 1997) with the peak hour remaining well below the quality standard in subsequent years, and standing at 130 in 2004.

Average concentration of particulates in Southampton city centre



Source: Southampton City Council

Days per annum exceeding the 50ug/m3 daily mean



Source: Southampton City Council

Similarly, the average concentration of particulates has remained well below the air quality standard over the period from 1994, staying below 30 since 1997, and although rising slightly in the last few years up to 27ug/m³, this has now fallen back to 25ug/m³. Likewise, whilst the number of days per annum exceeding the 50 ug/m³ daily mean had increased in the past to 14, from just under 10, this has now fallen to 3, well below both the current and proposed air quality standard.

The impact of air quality is becoming more important in the city centre with the increase of city living over the past few years, and so meeting these objectives is becoming all the more important. The city centre monitoring station has recorded better levels of air quality compared to those monitoring stations on the city outskirts.

Southampton City Council proposes to declare Air Quality Management Areas in the city and will be drafting an Air Quality Action Plan to try to improve air quality in the city due to the fact that air quality objectives will not be achieved for Nitrogen Dioxide in certain areas. Town Quay is the main city centre area where an Air Quality Management Area is proposed. The problem however is not unique to Southampton, and many other urban centres across the UK have already declared AQMAs. This will all feed into the Air Quality and Climate Change Strategy that Southampton City Council adopted at the start of the 2004/05 financial year. Southampton has related its own strategy to match the priorities under the UK Climate Change Programme, which is to ensure that the UK is secure in its delivery of its international target of reducing emissions of carbon dioxide. To support the national agenda, one of Southampton City Council's top five priorities 'Improving the Street Scene and the Environment', seeks to invest in recycling, Combined Heat and Power and environmental works to improve the city and the global environment.

Southampton Geothermal/CHP District Energy Scheme

Southampton Geothermal Heating Company has over the past 18 years designed, built and operated the largest commercial District Heating and Chilling Scheme in the UK. There are over 30 consumers of heating and chilled water in the city centre, including the De Vere and Ibis Hotels, the Royal South Hants Hospital, the Civic Centre complex, the entire WestQuay shopping centre, the BBC studios in Havelock Road, Southampton Institute, and several residential developments. Recent connections to the scheme include Springhill School, Barratt's Dell development and 480 key worker flats by Unite.

The energy is generated by a combined heat and power (CHP) plant supplemented by a geothermal well, together providing high overall efficiencies and lower greenhouse gas emissions. Three CHP engines at the Pirelli Street Heat Station generate 6.5MW electricity which is exported locally to the National Grid, with heat recovered during the generation process used to heat water which is then pumped around the city to consumers for heating and hot water. A further CHP engine is being installed at the Royal South Hants Hospital during 2005 in order to feed electricity to this site. Chilled water is also produced and sold for use in commercial air conditioning systems. This is a growth industry as personal affluence breeds the requirement for air conditioning. Peak load and standby boilers ensure 100% security of supply.

Energy supplied by Southampton Geothermal and CHP Community Heating Scheme

	2000	2001	2002	2003	2004
Heating	34,871	38,717	38,824	40,363	42,795
Chilling	3,599	6,191	6,540	7,299	7,295
Total	38,470	44,908	45,364	47,662	50,090
Percentage change		+ 16.7%	+ 1.0%	+ 5.1%	+5.1%

Source: Utilicom Ltd

There was a substantial increase in supply between 2000 and 2001 and, although smaller, the energy supplied by the scheme has still been increasing annually since then, with an overall increase of 30% between 2000 and 2004, and approximately 15% going to domestic customers annually. In addition to the above supply, the scheme also exported 18,677 KWh of electricity to the National Grid in 2004 to bring the total supply to almost 70,000 KWh (Source: Utilicom Ltd).

There are other geothermal systems in the UK but the Southampton system is the largest, and is the only UK CHP network providing heat to private domestic users.

Street cleansing

Cleaning of the city centre is continuously under review, to ensure that a high standard of cleansing is achieved and then maintained:

- Two applied sweepers now start at 6am Monday to Saturday, which, with the other cleaners, gives a little more time to wash the precinct and take in more side roads
- As a result, the large mechanical sweepers that start early have been rerouted so more work is completed and the main roads are swept twice a week
- Council-run multi-storey car parks are now being cleaned and checked every day of the week
- A late team work Thursday to Sunday taking down posters and assisting in the car parks or with anything else that requires attention
- Thirty bus shelters have been refurbished during the first quarter of the year, and a new monthly service is in place to clean and maintain all 320 bus shelters owned by the city council.

Environmental enhancement

Following the 2002 MORI survey, which identified pavement maintenance and road maintenance & repairs as the two service areas with the most dissatisfaction, work has continued to upgrade the environment of the city centre. This included resurfacing of areas around The Marlands shopping centre, Above Bar and Manchester Street.

At the A33 Charlotte Place gyratory two more underpasses were closed and replaced with controlled pedestrian crossings and additional cycle facilities as part of the new Jury's Inn hotel development. Once the development is completed further pedestrian and cycle crossings will be introduced to make the development fully accessible at road level.

More red surfacing has been introduced for bus lanes in the city centre. New bus shelters were installed in various locations. Two safety cameras have also been installed on Kingsway in order to improve the poor road safety record of this road, with improvements made to the pedestrian accessibility on the east side of Queensway.

Design work has continued on the North/South Spine and the first two elements are expected to be carried out in 2005/06. Upgrading works to the precinct commenced during the year, following the excessive wear and tear as a result of high usage. As part of this, stronger foundations have been laid. Installation of new trial street furniture (seating, bollards and fingerposts) at the northern end (Pound Tree Road) has also taken place. About twenty new cycle stands were installed in the city centre during 2004/05 and six premium quality bus shelters were recently installed outside the Art Gallery and in Northern Above Bar. These are artworks in their own right, and incorporate integrated bus operator timetables.

The installation of new, high-quality street name-plates started in the city centre and Old Town during 2004-05, whilst new street lighting was provided on the route from Central Station to the city centre. A further variable message sign was erected on West Quay Road to provide information on cruise ship visits including the ship name and dock number, which helps to link Southampton with its maritime image.

All these improvements assist the city in winning awards, and will help it to continue the trend of 2004/05 being an award winning year.

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Savills are pleased to be sponsoring
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