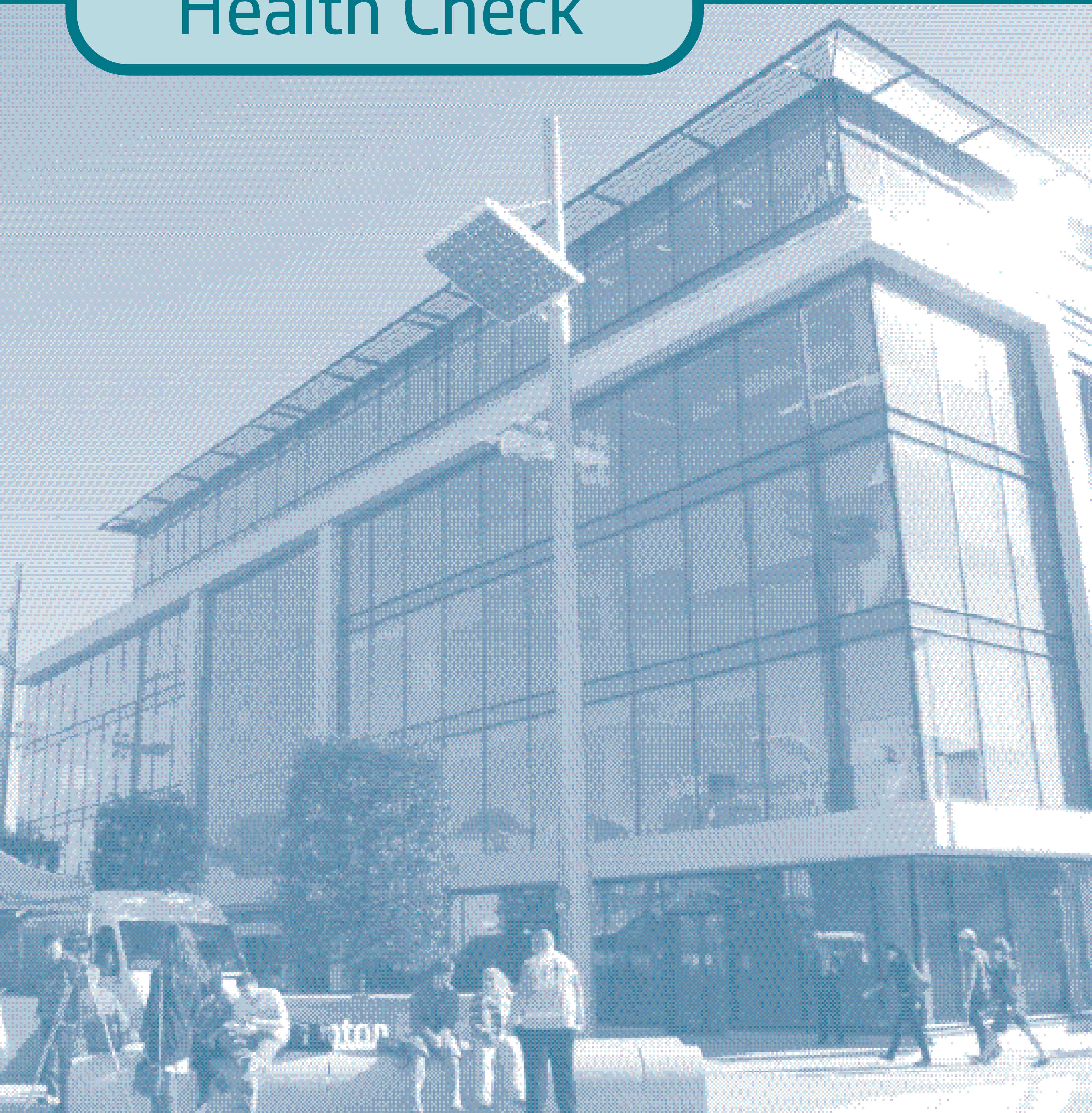
Southampton City Centre

Health Check

2009/2010



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Contents

Highlights

- There are an estimated 236,700 people living within the city boundary, amounting to approximately 18% of the Hampshire area. Each year 6,000 Southampton graduates enter the labour market - 30% stay within Southampton.
- In 2006 Southampton's economy was worth £4,953 million, over 30% higher than in 2002. This is coupled with around 7,700 businesses operating in the city providing employment for around 117,000 people.
- Physical investment in the city is continuing with a commitment to the creation of a cultural quarter which will include three new major developments - Guildhall Square, the Sea City Museum and Southampton's new Art Complex. The proposal will help secure around £175 million of private and public investment, bringing in more than 2,000 jobs and an additional £21 million of visitor spend each year.
- Southampton Airport contributes over £100 million to the regional economy and is investing over £7 million in improving facilities for passengers including a new footbridge, restaurants and bars, new toilet facilities and new automatic baggage sorting system for passengers connecting with flights.
- The Port of Southampton continues to be Britain's premier cruise port, and the cruise capital of Northern Europe. The Carnival UK head office on West Quay Road opened in 2009, employing 1,100 staff, and represents a commitment from the company to continue its investment in Southampton.
- Southampton has seen a doubling of cruise calls and passengers through the port and, in 2009 alone, passenger throughput reached record levels of over 1,050,000. To accommodate the growth of business and to attract more cruise calls to the port, ABP has invested in excess of £41 million in its infrastructure and facilities.
- Over the past five years, the number of people travelling at peak times into the city centre has continued to drop. This year has seen an overall fall in car use and a rise in pedestrian flows.
- Spare parking capacity is still low in several of the car parks demonstrating the popularity of Southampton as a retail destination.
- The highest pedestrian flows in 2009 were again recorded on Above Bar pedestrian precinct at the entrance to WestQuay, with a continued decline on the east side reflecting the number of vacant retail units in this area.
- The city centre land use mix shows that A1 uses, including convenience, durables and services, represent the largest sector by floorspace (72%).
- Southampton's 2009/10 retail rents have stayed level with 2008/9 reflecting the wider national picture and the cautious approach being taken by the retail sector. Southampton does however continue to have the highest retail rents in the region showing the strength and demand of the centre for retailing.
- Planning permission was secured in April 2009 for Hammerson's £150 million Watermark WestQuay development. The project will see the old Pirelli factory site transformed into a unique mixed-use development comprising cafes and restaurants, retail, multi-screen luxury cinema, a 150 bed hotel and up to 200 residential units as well as providing a new public plaza and park. Over 1,000 new jobs will be created.
- Plans for the construction of the West Quay B site are going ahead which will include a 155 bed Premier Inn hotel, restaurants and retail units with construction starting in June 2010. A second phase of 5,600 sqm of office space has planning approval.
- Construction started on the landmark eight storey 8,800sqm Police headquarter building in 2009 with completion expected by Spring 2011. It will house more than 500 police staff and will benefit from a state-of-the art custody centre with 36 cells.

Introduction to the Health Check

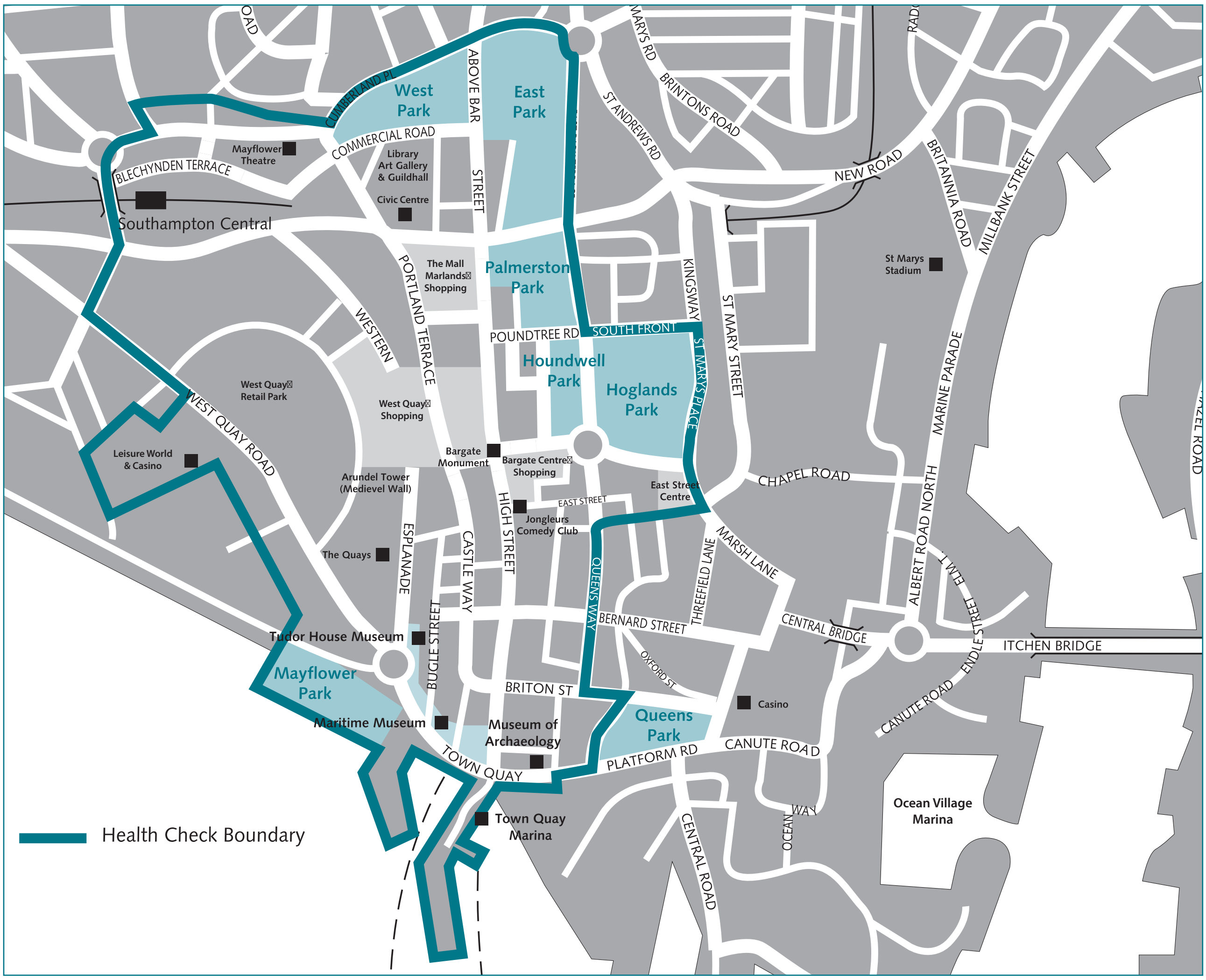
This document, published by Southampton City Council and Streets Ahead Southampton Ltd, reports on the results of the 13th annual City Centre Health Check undertaken between April 2009 and March 2010.

The Health Check, which ultimately aims to improve the vitality and viability of the city centre and acts as a key input into city centre management, has been produced in line with planning policy published in Planning Policy Statement 4 (PPS4), which states that Local Planning Authorities should use their annual monitoring reports to keep the following matters under review in order to inform consideration of the impact of policies and planning applications:

a. the network and hierarchy of centres
b. the need for further development, and
c. the vitality and viability of centres

It is suggested that in order to measure vitality and viability, monitor the health of town centres over time and inform judgements about the impact of policies and development, local authorities should also regularly collect market information and economic data, preferably in co-operation with the private sector.

PPS4 sets out the 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.



Source: Southampton City Council

There are an estimated 236,700 people living within the city boundary, amounting to approximately 18% of the Hampshire area and an increase of 0.9% from 233,600 in 2008 (Southampton City Council, 2010 from ONS Mid-year estimates, 2009). Of Southampton's population, 68.9% of the working age population are economically active, indicating a continued decrease since April 2007. This can be attributed to the economic downturn that has become prevalent in the United Kingdom since the latter part of 2007. Economic activity in Southampton is lower than both the South East (78.1%) and the national rate of 73.2% (Office for National Statistics and Labour Force Survey 2009).

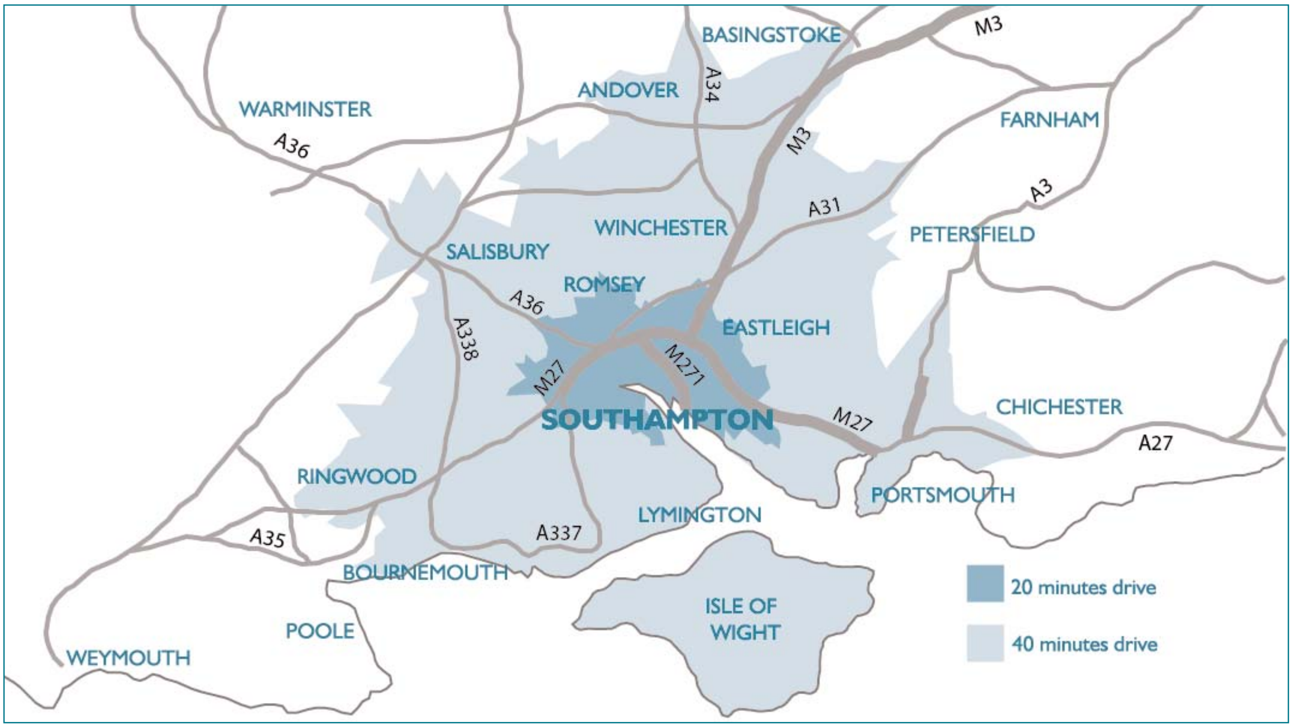
There is a student population in Southampton of around 40,000, an increase of around 25% since 1998/99. Each year approximately 6,000 graduates enter the labour market, with about 30% staying within the Southampton area after graduating to seek career opportunities. This gives the region's employers access to a large pool of graduate labour including specialist areas such as marine, science, biotechnology, electronic engineering, medical sciences, opto-electronics, law and social sciences (Invest in Southampton, 2010).

Despite the statistics above on economic activity, Southampton is ranked as one of the top five performing cities in England for employment, population growth and skills by the Institute for Public Policy Research (IPPR) (Southampton City Council, 2010). In 2006 Southampton's economy was worth £4,953 million, 30% more than in 2002. Southampton along with Portsmouth are two cities driving the development of the wider South Hampshire sub-region's economy and together provide more than 41% of the 650,000 jobs in Hampshire (Invest in Southampton, 2010).

There are 7,700 businesses operating in the Southampton area with over 117,000 people either employed or self employed (Invest in Southampton, 2010). The majority of businesses in Southampton are micro businesses that employ less than 10 people. However it is the larger companies that provide most jobs in Southampton. Southampton is home to many key household names in the UK, such as Skandia, B&Q, John Lewis, Ordnance Survey and IKEA. The largest public sector employers in Southampton include the NHS Hospital Trusts and Southampton City Council. Southampton is also home to Carnival UK and is the UK's cruise capital with a world-class port contributing over £2 billion to the economy.

Since the start of this century there have been some structural changes in the type of businesses that operate within the city, with a decrease in the number of manufacturing businesses, as well as a slight decrease in distribution, hotels and restaurant businesses. Conversely, there has been a significant increase in the number of businesses in the banking, finance and insurance sector and in the public administration, education and

Drive time map showing main catchment area for Southampton



Source: Savills Residential Development Southampton health sector as well as tourism (Invest in Southampton, 2010). In addition manufacturing, transport and warehouse distribution functions related to the port also assist the economy. The number of cruise passengers passing through the Port of Southampton has continued to increase with just over 1 million passengers handled by the port in 2009/10 (ABP Southampton, 2010). Further to this, 1.8 million passengers departed from the International Airport between 2009 and 2010 (Southampton Airport, 2010). The airport contributes over £100 million to the regional economy every year and is one of the biggest employers in the region with over 1,200 people employed on site (Southampton City Council and Marketing Southampton, 2010).

Physical investment in the city and maintaing a good quality environment is important to creating new jobs and facilities and, thereby attracting further investment into the city. Southampton City Council remains committed to the creation of a cultural quarter which will include the existing facilities of the City Art Gallery, BBC South Broadcasting House, the historic Central Parks, The Mayflower theatre, Central Library, The Guildhall, One Guildhall Square, Southampton Solent University's Sir James Matthews Building and the three new major developments - Guildhall Square, the Sea City Museum and Southampton's new Arts Complex. The proposals will help secure around £175 million of private and public investment, bringing in more than 2,000 jobs and an additional £21 million of visitor spend each year according to Southampton City Council (2010).

Outline planning permission was secured in April 2009 for Hammerson's £150 million Watermark WestQuay development. The project will see the old Pirelli factory site transformed into a unique mixed-use development. The scheme will comprise cafes and restaurants, retail, multi-screen luxury cinema, a 150 bed hotel, up to 200 residential units and a new public plaza and park. Over 1,000 new jobs will be created (Southampton City Council and Marketing Southampton, 2010).

Construction of the West Quay B site starts in June 2010 and will include a 155 bed Premier Inn hotel, restaurants and retail units with completion expected in Spring 2011. A second phase of 5,600 sqm of office space has planning approval (Southampton City Council and Marketing Southampton, 2010).

The Carnival UK landmark corporate head office on West Quay Road opened in 2009 and employs 1,100 staff. It has agreed a long term deal with the port to use Southampton as the central hub for their UK cruise operations (Southampton City Council and Marketing Southampton, 2010). This highlights Southampton's status as the number one cruise port in Northern Europe and provides a major enhancement to the economy. In addition to the creation of jobs, its location in Southampton will have positive effects on welcoming more cruise passengers and enticing other large companies to set up home in the region by helping to reinforce the commercial importance of Southampton in the south east region.

In order to accommodate the growing number of ships and the now all year round cruise season, Associated British Ports (ABP) recently spent more than £20 million on the Ocean Terminal (Southampton City Council and Marketing Southampton, 2010).

The historic Dolphin Hotel is undergoing a £4 million refurbishment under the international Mercure brand, re-opening in May 2010.

Construction started on the landmark eight storey 8,800 sq m Police headquarter building in 2009. It will house more than 500 police staff and will benefit from a state-of-the art custody centre with 36 cells. It is anticipated that the scheme, built on Southern Road, will be complete by Spring 2011 (Southampton City Council and Marketing Southampton, 2010).

Work has also commenced on the preparation of a Southampton City Centre Masterplan that will provide the vision and direction for the long term development of the city centre.

The above demonstrates the ongoing investment in a thriving sustainable mixed-use city centre with an emphasis on quality of life in, and visits to, the city centre. This document reports on progress towards this goal.

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 benefiting from its proximity to London. In 2008 the city was listed 9th in the country for having the best international transport links and 10th for the best external transport links (Cushman & Wakefield, UK Cities Monitor report 2008) demonstrating the high quality transport links the city provides. 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 and 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 one hour. Southampton Central railway station is the hub of the region's **rail network**, with frequent services operating from many destinations throughout the country with dedicated buses that link directly to the Isle of Wight ferries.

Destinations served from Southampton Rail Station

National destinations
London Waterloo, Birmingham, Gatwick Airport, Manchester and Brighton
Regional destinations
Basingstoke, Bournemouth, Poole, Weymouth, Bath, Bristol, Cardiff, Chichester and Oxford
Local destinations
Salisbury, Romsey, Eastleigh, Chandler's Ford, Fareham and Portsmouth

Over the past year the number of rail journeys either starting or ending at Southampton Central has decreased by 2.5% compared to 2008/09. South West Trains attribute this decrease to the economic downturn with season tickets in particular seeing a decline. Value for money fares are available on South West Trains services through various products including:

- Group Save - allows groups of three or four people to travel for the price of two when using off-peak services (conditions apply).
- Megatrain - fares from £1 plus 50p booking fee on selected services from Southampton Central to London Waterloo.

Passenger journeys to and from Southampton Central railway station

2005/6	2006/7	2007/8	2008/9	2009/10
4,844,000	5,092,000	5,383,000	5,750,000	5,601,460
	+5.1%	+5.7%	+6.8%	-2.5%

Source: South West Trains

The National Express **coach station** also lies within the city centre, linking Southampton into the national coach network with hourly direct services to London and Heathrow Airport, Bournemouth and Portsmouth every second hour, and Edinburgh every day. The numbers travelling to Southampton by National Express coaches over the past year has seen a significant rise with a 17.7% increase in passenger numbers compared to 2008/9. The main reason for this increase is due to changes made to services in September 2009 and also having a much more attractive service to London. In addition traffic to Heathrow increased in the period 2009/10 compared to the drop reported in 2008/9. The Greyhound bus service also continues to operate, a subsidiary of transport giant FirstGroup, with one of its main services running from Southampton to London. Greyhound services also integrate with ferry services to and from the Isle of Wight. Regional bus operators also provide frequent services to various destinations within the south of England.

Passenger journeys on National Express Coaches arriving in Southampton

2005/6	2006/7	2007/8	2008/9	2009/10
177,000	179,000	178,000	169,028	199,021
	+1.1%	-0.6%	-5.0%	+17.7%

Source: National Express

Passengers through Southampton International Airport

2005/6	2006/7	2007/8	2008/9	2009/10
1,861,856	1,945,500	1,992,444	1,902,566	1,805,395
	+4.5%	+2.4%	-4.5%	-5.1%

Source: Southampton International Airport

Southampton International Airport continues to contribute to the region's growing international transport links and currently welcomes around 2 million passengers each year, of which around 40% are business passengers (Southampton Airport, 2010). A growing area of the business is the increase in cruise passengers using the airport to join their cruise ships visiting the port of Southampton.

Twelve airlines and tour operators operate at the airport offering flights to around 50 destinations across the UK and Europe on over 900 weekly flights, with major destinations including Paris, Brussels, Amsterdam and Frankfurt as well as most major cities in the UK, Ireland and the Channel Islands (Southampton Airport, 2010).

The airport is served by its own dedicated railway station - Southampton Airport Parkway, which provides one of the shortest train-to-plane connections of any European airport. There are approximately three trains per hour to London Waterloo (just 66 minutes away). The airport is also situated within close proximity to the M27 (Junction 5) and the M3 motorways.

During 2010 Southampton Airport is investing over £7 million in improving facilities for passengers. These include:
- A new footbridge adjacent to the airport terminal, at a cost of over £2 million. The covered walkway has lift access, making access to and from the airport significantly easier for passengers with luggage, children or reduced mobility.
- New restaurants, bars and coffee shop facilities throughout the airport.
- Brand new toilet facilities across the airport with built-in energy saving systems.
- New air conditioning units which are around 50% more efficient than the previous equipment.
- New roof glazing to provide a lighter and brighter terminal with a special sun reflecting coating, eliminating around 33% of the heat gained from the sun, which means less energy is needed for air cooling.
- New automatic baggage sorting system for passengers connecting with flights.

Passengers and vehicles on Red Funnel crossings

	2005/6	2006/7	2007/8	2008/9	2009/10
Passengers	3,036,273	3,114,926	3,085,745	2,988,764	3,085,891
		+2.6%	- 1.0%	-3.1%	+3.2%
Vehicles	647,311	665,539	666,306	665,828	696,056
		+2.8%	+0.1%	-0.1%	+4.5%

Source: Red Funnel Group

Passenger numbers on **Red Funnel cross solent ferries** saw a solid increase of 3.2% in 2009/10 compared to 2008/9. Vehicle numbers also increased by 4.5% compared to 2008/9. Passenger numbers have returned to their 2007/8 levels with overall numbers remaining relatively consistent since 2006/7.

White Horse Ferries also operate **passenger ferries** across Southampton Water from Hythe and the New Forest every half an hour. This service carries almost 400,000 passenger movements a year.

The **Port of Southampton** is owned and operated by Associated British Ports (ABP), the UK's largest and leading ports group. Southampton is the UK's premier international gateway port, connecting trading nations across the world. In addition to being the home of the UK's second largest container port and the UK's leading car handling port it is also Britain's premier cruise port, and the cruise capital of northern Europe.

Situated on the central southern coast of England with excellent road and rail connections from London and international airports, the Port's location is one of its major assets. This, combined with a sheltered deep water approach channel, gives guaranteed unrestricted access to the world's largest cruise ships, 365 days a year.

Accessibility

In recent years, Southampton has seen a doubling of cruise calls and passengers through the port, and in 2009 alone, passenger throughput reached record levels of over 1,050,000. To accommodate the growth in the cruise business and to attract more cruise calls to the port, ABP has invested in excess of £41 million in its infrastructure and facilities.

Number of cruise passengers handled by the Port of Southampton

2006	2007	2008	2009	2010 (est)
737,000	800,000	971,000	1,050,000	1,200,000
	+8.5%	+21%	+3.0%	+14.3%

Source: Associated British Ports

2010 is expected to be another record breaking year for Southampton with over 1.2 million cruise passengers predicted to pass through the port on 305 cruise calls. The port has also been the chosen backdrop for seven prestigious inaugural promotional calls for new cruise ships, more than ever before in the port's recent history. The demand for cruising from the UK continues to grow and 2010 is looking to be another year of growth for the port.

As an award winning turnaround port, a great deal of services are required to support the cruise vessels, including stevedores, coach companies, taxis, check in staff, hotels and restaurants, all of which combine to ensure Southampton remains the UK's cruise capital. The range of services involved in each cruise ship call means cruising is a significant economic driver of the local and regional economy. Today it is estimated that every time a cruise ship calls, over £1.25 million is generated in the local and regional economy. The commercial growth of cruise vessels through the port is therefore critical to regional prosperity.

Travel within Southampton

Southampton is well served by **public transport**. Several operators provide the main **bus network**. First mainly serves the city area. Bluestar serves the city and surrounding districts and also 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 Above Bar pedestrian precinct and up to 40 different bus routes run through 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 19 million bus passenger trips throughout Southampton (combined data from all bus companies). Many bus shelters and stops in Southampton are fitted with Real Time Bus Information signs which show the predicted arrival times for equipped buses to encourage people to travel by bus.

The City Link shuttle bus connects Southampton Central railway station directly to WestQuay, the city centre and Town Quay ferry terminal operating every 15 minutes during shopping hours and 30 minutes at other times. Surveys carried out show over one million passengers use the service annually.

Southampton City Council subsidises **Nightlink** services operating hourly to the east and west of the city between 00.00 and 03.30 on Friday and Saturday nights. These complement the commercial hourly 'Bluestar' services to Winchester, Waterside and Eastleigh and also the Eastleigh Borough Council funded hourly services to Botley, Netley, Hamble, Chandler's Ford, Winchester, Eastleigh and Fair Oak operated by Bluestar on Friday and Saturday nights.

First operates a significant proportion of its vehicle fleets as low-floor buses, each of which provide one wheelchair space on board and due to the low floor are beneficial to a wide section of the community, not simply wheelchair users. Bluestar and Unilink bus services in the city are all low floor.

Taxis are widely available in Southampton. Principal ranks can be found at key strategic points (see Transport Map on page 15). There were 267 licensed Hackney Carriages in operation during 2009. All additional Hackney Carriages are brand new, with wheelchair access. The number of Private Hire Taxis fluctuates according to economic conditions, but around 550 are in operation, showing little change compared to 2008/9. Taxi marshals operate on Friday and Saturday nights on three city centre ranks - Above Bar (opposite Yates), London Road and Lower Banister Street.

The city centre continues to be a popular destination for **cycling** and the city council has been effective in promoting walking and cycling under the Active Travel banner. Trips recorded for cyclists are well above target.

The City Council's Transport Policy Team has worked with several key organisations over the past year. With Sustrans the Connect2 Boardwalk project is under way and will be completed in July 2010 ahead of schedule. The StreetTread Walking and Cycling Project had 4,500 beneficiaries, with about 50% of these being children. This included walking, cycling and specialist activities and cycle skills and cycling for those with special needs and physical disabilities. Over 2,500 people took part in the June 2009 Big Bike Celebration.

Working with British Cycling and Sky, the SkyRide in July 2010 will involve closed roads in the city for cyclists. In advance of this a British Cycling development officer will be working with the city on strategic cycle issues. British Cycling still continues to work with 20 schools in providing a Go Ride school cycling activity for primary and junior schools.

Another achievement is the setting up of a Work Place Cycle Challenge with the CTC (Cyclists Touring Club - the national organisation for cyclists). The aims of this are to get over 1,000 employees working in the city to register and cycle and encourage those who have not cycled before.

The city centre **Legible Cities map** is a popular map that pedestrian visitors find simple to use as it clearly identifies the city centre, key locations and landmarks which are within easy walking distance.

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 28 signs highlight car parking spaces on routes into the city centre and a Cruise Terminal Information sign is used to direct passengers and deliveries to the correct dock gate for cruise liners in the port.

Transport flows and modal split

Transport flow information can be used to provide an indication of the number of people entering and leaving Southampton city centre, with regular annual surveys 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.

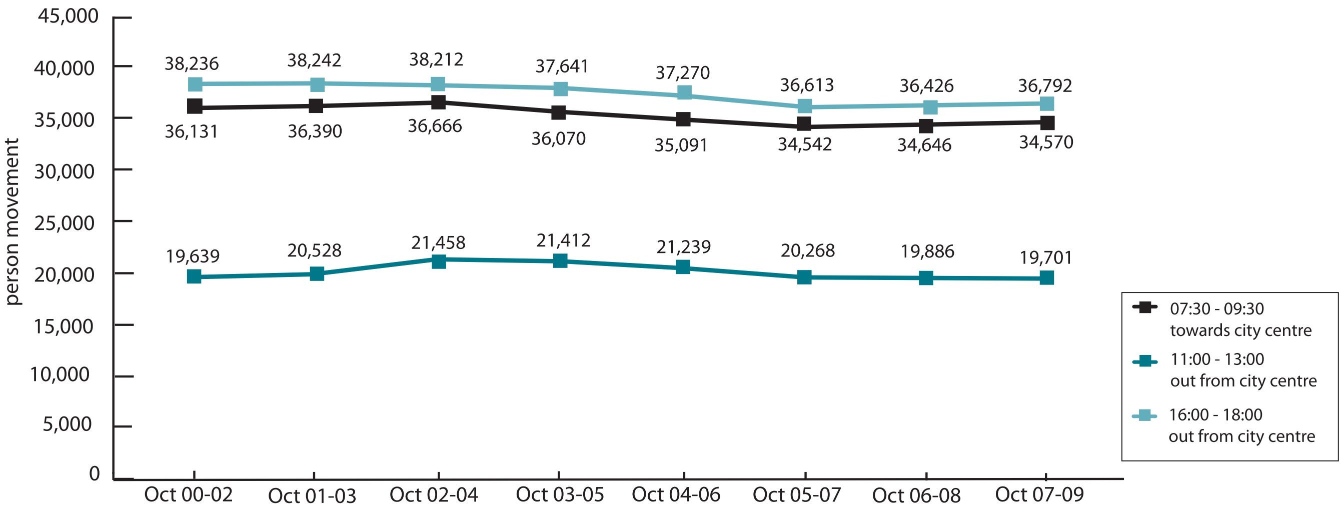
The graphs and tables indicate that traffic flow is approximately 80% higher during peak hours compared to off-peak times. Also, the types of transport used differ between peak and off-peak.

It appears that the figures, whilst not significantly different to previous years, are continuing to decline for peak am and lunchtime, however peak pm figures have risen compared to the 2006 - 2008. Although employment in the city may have fallen due to the recession, with three year averages this would not yet be picked up.

The modal-split tables analyse transport-flow figures with regard to the method of transport used. Private transport continues to account for almost two-thirds of Southampton's person movement, public transport about one quarter (apart from at lunchtime) and pedestrians between one sixth and one tenth, increasing throughout the day. The relative shares of individual modes has remained similar to previous years with the private car remaining the dominant mode with around 60% of the share, followed by the bus and pedestrians at between one tenth and one fifth.

Accessibility

Total traffic flows into and out of Southampton city centre



Source: Southampton City Council

Over the past year there has been a slight percentage reduction in person movement by private car during peak am and lunchtime representing a continued drop since 2002 - 2004, however for the first time since 2002 - 2004 there has been a slight increase in person movement by private car during peak pm. This may be as a result of more flexible working hours where people have more choice over the hours they work. Associated with this there has been an increase in pedestrian flow at all times, reflecting a move away from the private car to other modes of more environmentally friendly transport including walking. This could be for a number of reasons including increasing fuel prices, traffic and congestion avoidance, more efficient public transport, or wider understanding of the benefits of using more sustainable modes of transport and positive health impacts.

Person movement by pedal cycle and rail has continued to rise pointing to the increasing popularity of these modes. The number of persons using bus and ferry have however stayed relatively consistent with only slight fluctuations up or down and therefore continuing to represent a significant proportion of modes used. The continuing overall increase in public and more sustainable modes of transport is positive given the need to reduce air pollution and promote the use of sustainable travel.

To investigate these movements more fully, it would be useful to review travel modes and numbers throughout the day and in both directions. This would allow a clearer assessment of the movements into and out of the city centre and allow for a more accurate picture of the actual trends occurring in terms of modal shifts, which will in turn allow for more informed explanations of the data. It would also be useful to analyse the data by individual years to reveal more specific trends such as economic impacts as these can often be masked by the three-yearly data currently used.

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

	2004 - 2006	2005 - 2007	2006 - 2008	2007 - 2009
Light vehicle	21,625 (61.6%)	20,852 (60.4%)	20,524 (59.2%)	20,081 (58.1%)
Motor cycle	363 (1.0%)	333 (1.0%)	321 (0.9%)	315 (0.9%)
Pedal cycle	733 (2.1%)	749 (2.2%)	798 (2.3%)	836 (2.4%)
Total private	**22,721 (64.8%)**	**21,934 (63.6%)**	**21,643 (62.4%)**	**21,232 (61.4%)**
Bus	6,010 (17.1%)	6,180 (17.9%)	6,130 (17.7%)	5,999 (17.4%)
Rail	1,734 (4.9%)	1,804 (5.2%)	1,971 (5.7%)	2,139 (6.2%)
Ferry	822 (2.3%)	799 (2.4%)	755 (2.2%)	730 (2.1%)
Total public	**8,566 (24.4%)**	**8,783 (25.5%)**	**8,856 (25.6%)**	**8,868 (25.7%)**
Pedestrian	3,804 (10.8%)	3,825 (11.1%)	4,147 (12.0%)	4,147 (12.0%)
Overall Total	**35,091 (100%)**	**34,542 (100%)**	**34,646 (100%)**	**34,570 (100%)**

Source: Southampton City Council

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

	2004 - 2006	2005 - 2007	2006 - 2008	2007 - 2009
Light vehicle	13,926 (65.6%)	13,149 (64.9%)	12,601 (63.4%)	12,269 (62.3%)
Motor cycle	141 (0.7%)	133 (0.7%)	120 (0.6%)	119 (0.6%)
Pedal cycle	363 (1.1%)	220 (1.1%)	199 (1.0%)	225 (1.1%)
Total private	**14,430 (67.5%)**	**13,502 (66.7%)**	**12,920 (65.0%)**	**12,613 (64%)**
Bus	3,016 (14.2%)	2,989 (14.7%)	3,117 (15.7%)	3,104 (15.8)
Rail	566 (2.7%)	566 (2.8%)	551 (2.8%)	604 (3.1%)
Ferry	201 (0.9%)	204 (1.1%)	189 (1.0%)	195 (1.0%)
Total public	**3,783 (17.7%)**	**3,759 (18.6%)**	**3,857 (19.5%)**	**3,903 (19.9%)**
Pedestrian	3,153 (14.8%)	3,007 (14.8%)	3,109 (15.6%)	3,185 (16.2%)
Overall Total	**21,366 (100%)**	**20,268 (100%)**	**19,886 (100%)**	**19,701 (100%)**

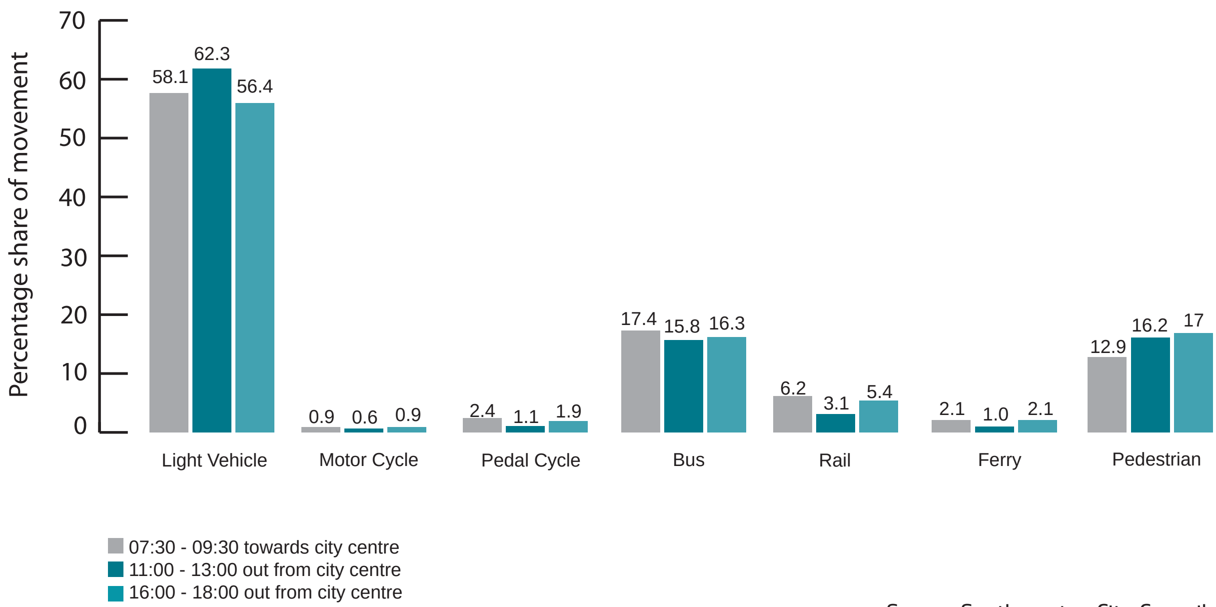
Source: Southampton City Council

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

	2004 - 2006	2005 - 2007	2006 - 2008	2007 - 2009
Light vehicle	22,242 (59.7%)	21,579 (58.9%)	20,973 (57.6%)	20,766 (58.9%)
Motor cycle	347 (0.9%)	345 (0.9%)	337 (0.9%)	326 (0.9%)
Pedal cycle	653 (1.8%)	678 (1.9%)	705 (1.9%)	709 (1.9%)
Total private	**23,242 (62.4%)**	**22,602 (61.7%)**	**22,015 (60.4%)**	**21,801 (61.7%)**
Bus	6,316 (16.9%)	6,240 (17.0%)	6,041 (16.6%)	6,010 (16.3%)
Rail	1,735 (4.6%)	1,729 (4.7%)	1,857 (5.1%)	1,996 (5.4%)
Ferry	729 (4.6%)	766 (2.1%)	731 (2.0%)	745 (2.1%)
Total public	**8,780 (23.5%)**	**8,735 (23.8%)**	**8,629 (23.7%)**	**8,751 (23.8%**
Pedestrian	5,258 (14.1%)	5,276 (14.4%)	5,782 (15.9%)	6,240 (17.0%)
Overall Total	**37,280(100%)**	**36,613 (100%)**	**36,426 (100%)**	**36,792 (100%)**

Source: Southampton City Council

Split in movement over time into and out of city centre, 2007 - 2009



Source: Southampton City Council

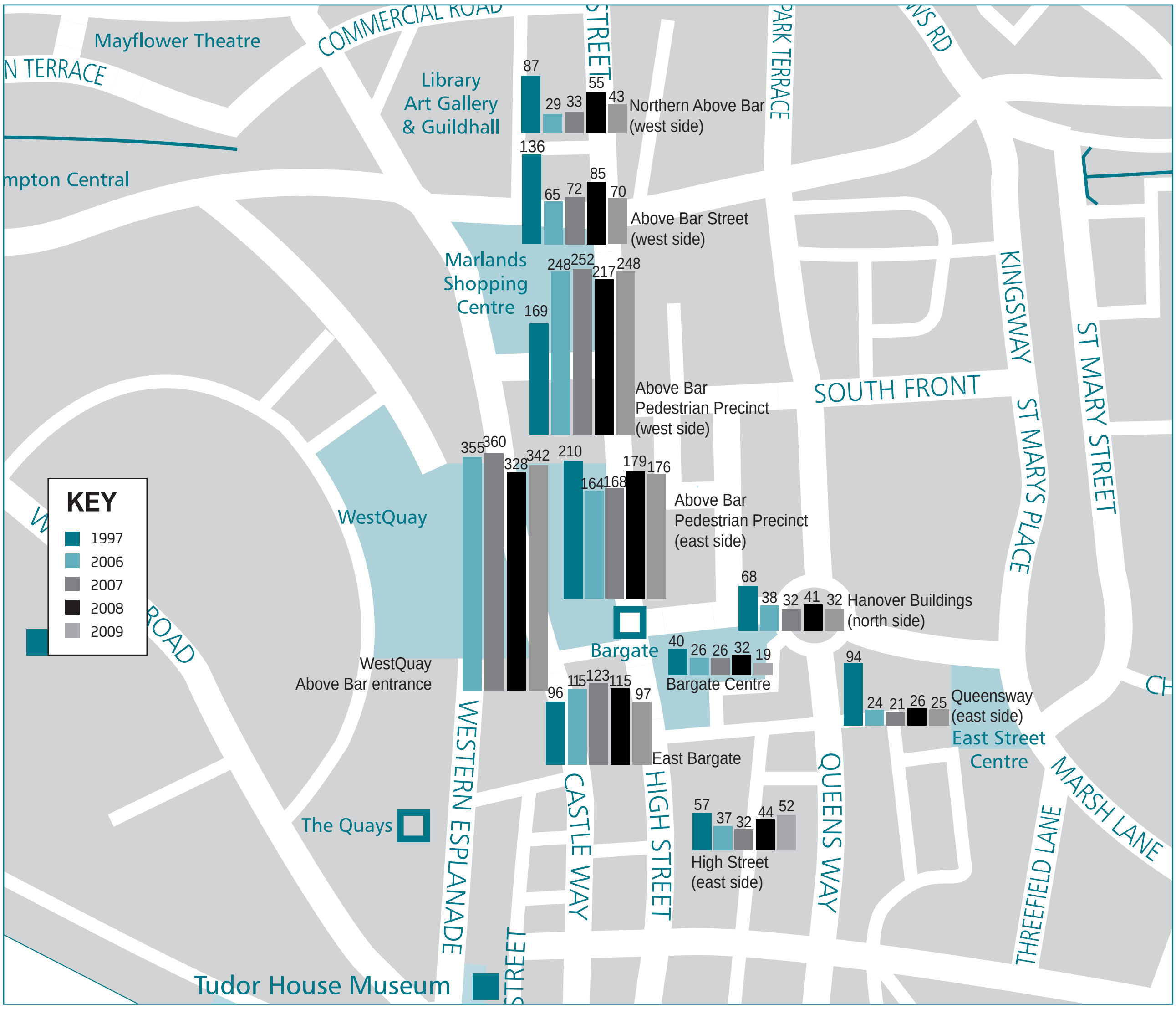
Pedestrian movement within the city centre

In 2009, for the 9th year (1997 and 2002 - 2009) Pedestrian Market Research Services (PMRS) were commissioned by Southampton City Council to carry out a set of pedestrian flow counts in Southampton. The flows were measured throughout the city centre with 30 points selected between Northern Above Bar and the High Street, and from East Street to the western side of the High Street.

The figures used are benchmarked to an average index of 100 to reflect the average pedestrian flow indicating the locational hierarchy throughout the centre. The map below sets out these results showing years 1997 (pre-WestQuay) and 2006 - 2009.

Average pedestrian flows 1997, 2006 - 2009

(Survey dates 6/7 June 1997, 16/17 June 2006, 8/9 June 2007, 13/14 June 2008 and 12/13 June 2009)



Source: Southampton City Council / PMRS

In 1997, a few years prior to the opening of WestQuay shopping centre, the highest flows were recorded outside the current Primark store (then Marks & Spencer) on Above Bar pedestrian precinct, but this only represented twice the average count, with northern points at Northern Above Bar and Above Bar Street and Queensway sitting just either side of the average rate of 100. Flow was concentrated on the precinct, but with little marked variation along and around the this north/south route.

In 2009, the highest flows in terms of the selected points were recorded on Above Bar pedestrian precinct (248) and WestQuay Above Bar entrance (342), where footfall is over three times the city centre average. Both these locations have seen a rise in pedestrian numbers compared to 2008 which could be for a number of reasons including the increased retail offer in these locations with the take up of vacant units and the concentration of more popular retail units. Marlands Shopping Centre has also seen a relatively significant increase in footfall since 2008 and this can be attributed in part to its increased retail offer through the occupation of five previously vacant units.

Elsewhere, footfall has declined compared to levels seen in 2008, in some cases to the lowest levels recorded between 2006 - 2009. This may be as a result of the large number of vacant units in these areas, particularly in the Bargate Shopping Centre and East Street Shopping Centre, and also as a result of the changing uses in these areas including the ongoing construction of Guildhall Square along northern Above Bar Street.

As in previous years, the picture has remained similar with a divide between the west and east sides of the precinct whereby footfall has remained strong on the west side since the opening of WestQuay but is still relatively low on the east side.

Accessibility for disabled people

Accessibility in the city centre is aided by raised bus kerbs to give better access to the low-floor buses and the provision of tactile crossings for people with visual impairments. To aid accessibility for disabled people within the city centre there are two Shopmobility schemes in operation, WestQuay Shopmobility (www.west-quay.co.uk) in the shopping centre and Southampton City Shopmobility (www.southamptonvs.org.uk/shopmob.htm) in Castle Way near to the central shopping area. Both schemes provide powered wheelchairs/ scooters and manual wheelchairs, allowing both permanently and temporarily disabled people to shop and carry out their business independently.

Southampton Action for Access (SAFA) has produced an access guide which contains details of the accessibility of over 450 businesses (compared to just over 300 in 2007) as well as over 130 City Council services along with transport and parking information. In 2009, 147 locations including East Street, High Street and WestQuay, were re-audited including cafes, restaurants and fast-food outlets to ensure the guide is up to date. SAFA's website (www.southamptonaccess.org.uk) provides information gathered from the audits as free publicity and hence acts as an incentive to participate in the surveys. In addition, SAFA is looking for advertisers to fund production of a hard copy of the guide to go out to residents and visitors of Southampton free of charge.

Car parking

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 2009/10
	MULTI STOREY CAR PARKS	
1	Bargate Shopping Centre (private)	220
2	WestQuay Multi-Storey (private)	2,500
3	WestQuay Podium (private)	1,500
4	Marlands	810
5	Eastgate Street	713
6	Portland Terrace (private)	605
7	Grosvenor Square	540
8	West Park Road weekends	510
	West Park Road weekdays	96
9	Bedford Place (previously Salisbury Street)	284
10	IKEA	900
	TOTAL (weekend numbers)	**8,582**
	SURFACE CAR PARKS	
11	West Quay Retail Park (private)	693
12	Toys 'R' Us (private)	310
13	The Quays (North)	114
14	Mayflower Park	208
15	Lime Street	227
16	Southbrook Road	113
17	Leisure World (private)	885
	Other*	791
	TOTAL (weekend numbers)	**3,341**
	GRAND TOTAL (weekend numbers)	**11,923**

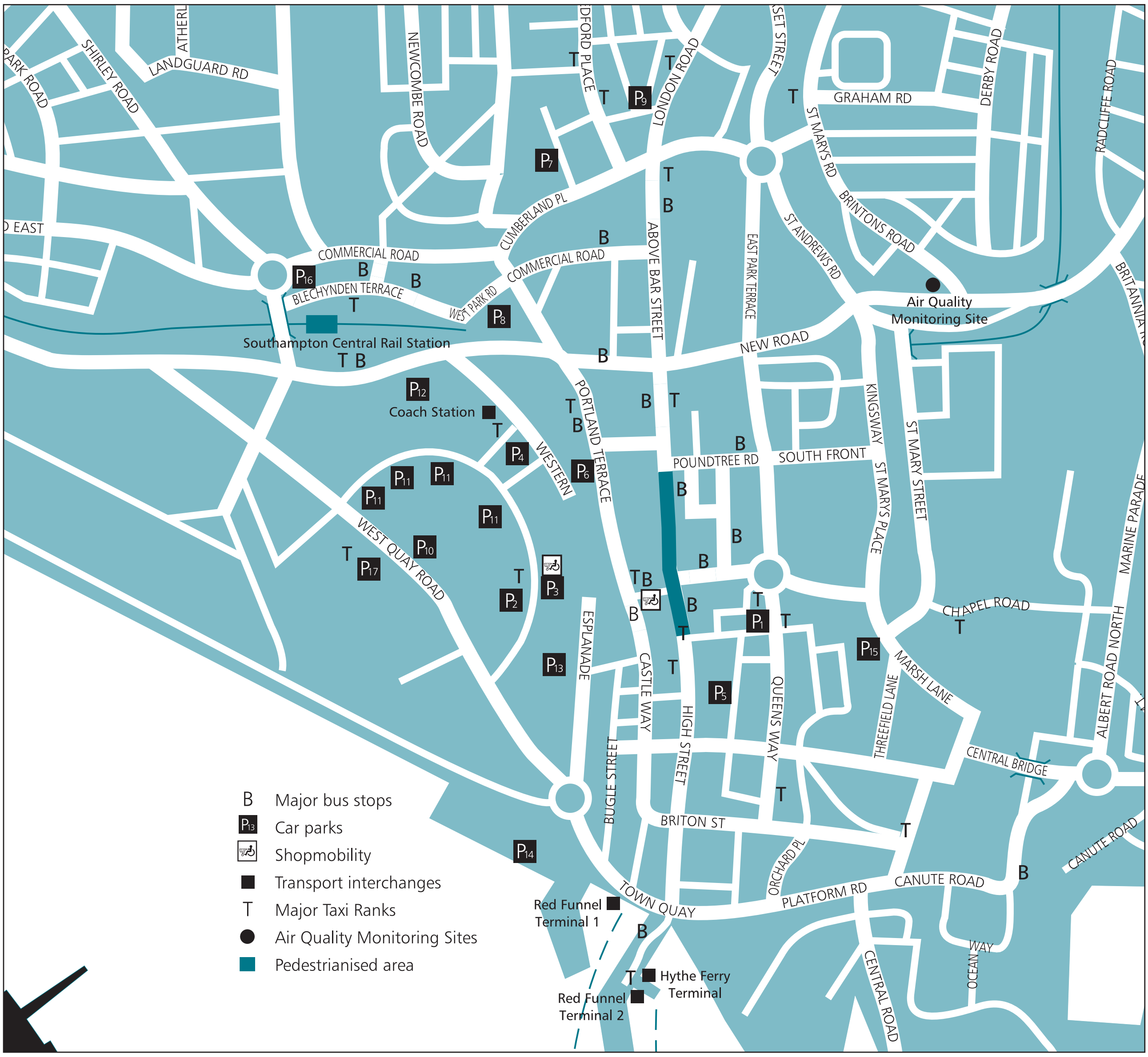
Source: SCC Parking Services/ CCTV Unit
* 17 spaces in the "other" category are for Shopmobility users only

Over the past year there were no significant changes to the parking provision, however, significant maintenance and upgrading work continues to be undertaken on city council owned multi-storey car parks in the city centre. Overnight charges continue to be in operation for all city council multi-storey car parks from 18:00 - 23:59, with charges of £1 for up to one hour, £2 for up to two hours and £3 for over two hours.

In addition to the car parks listed above, there are over 1,500 on-street parking spaces within Southampton city centre, for parking from one to four hours, with charges applying every day of the week except Christmas Day and Easter Sunday, but not at night. In 2006, 285 state of the art pay and display machines were installed as part of a wider initiative to replace all existing machines. These new machines have enhanced vandalism and theft prevention designs, and are powered by solar energy, significantly reducing the amount of electricity used. They are also the first in the country to accept chipped credit card payment.

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. In addition to this there are designated areas for coach parking located in South Front, Canute Road, Platform Road, Herbert Walker Avenue and in Ocean Village.

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

WestQuay car parks, Civic Centre Forecourt, Bedford Place (previously Salisbury Street), Marlands, Eastgate Street, Grosvenor Square, Grosvenor Square North and West Park Road car parks have been awarded the Park Mark certificate. The certificate is issued by the Association of Chief Police Officers, promoted by national government and administered by the British Parking Association.

Season tickets are available from NCP and also for one, three, six or 12 months in the council's general purpose car parks, however the city council is phasing out these time based season tickets and replacing with Pay as You Park Decrementing Cards which offer customers better value and allow customers to pre-load value and only pay for parking time used. These cards also provide a discount.

Car parking

Car park capacity

The level of spare capacity in two city council run multi-story car parks (Marlands and Eastgate Street) 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 eight years. Recent figures are shown on the following graphs.

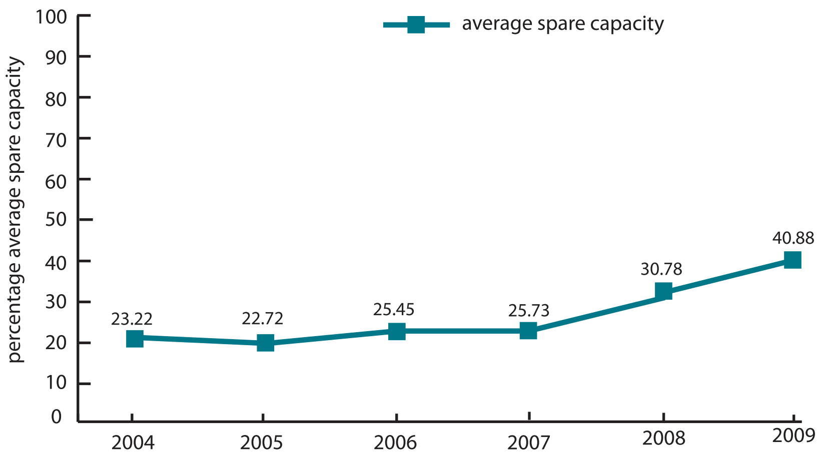
The opening of WestQuay in 2000 saw a decrease in spare capacity from almost 50% to 41% in 2009. Between this period spare capacity has been as low as 22%, with weekends continuing to see the lowest levels of spare capacity. The rise in spare capacity in 2009 to 41% may be attributed to the higher car parking fees which the council introduced. However since the data was collected the council has begun to implement alternative ways of charging for car parking such as the Pay as You Park cards which charge less than the standard car parking rate, and an overall reduction in car parking prices. It is likely that the impact of this, if any, will be seen in the next year.

Marlands car park is clearly a more shopper orientated car park but has lost some patronage in recent years which is shown by the continued rise in capacity especially during the week days. Eastgate Street is also a predominantly shoppers' car park but despite this has seen an increase in spare capacity both during the week and at weekends, where it is on average over 50% unoccupied. Overall spare capacity has increased by nearly 30% which is a significant rise. This may be as a result of the increased number of vacant retail units in this area of the city centre, alongside the ease of use and availability of spaces in the WestQuay car parks. Both the WestQuay Multi-Storey and the WestQuay Podium car parks' spare capacity has remained fairly consistent since 2004 and, as expected, they continue to be busy at weekends. These car parks are not affected by changes in council charging structures

All monitored car parks, except for WestQuay Podium, show a marked difference in spare capacity between weekdays and weekends, with spare capacity being higher during the week, however both the Marlands and Eastgate Street car parks have seen rises in spare capacity at weekends, which has narrowed the difference in capacity levels between the week and at weekends. Spare capacity at WestQuay Podium is more consistent remaining at low levels throughout both the week and at weekends, reflecting the popularity of the car park location and its accessibility to the city centre.

Spare capacity levels for car parks within the city centre is an important source of information to retailers and investors on the ability of car parks to cope with the potential increased demand for spaces which could be generated by new retail moving into the city centre and new development. In the past it has been suggested that loss of spare capacity needed to be addressed to ensure that it did not stifle the city's development. It appears now that this trend has stabilised and lack of spare capacity is only potentially an issue at West Quay Podium at weekends. However, there is a high level of capacity in other car parks and as such it is considered that current car parking provision meets the needs of the city.

Average spare capacity



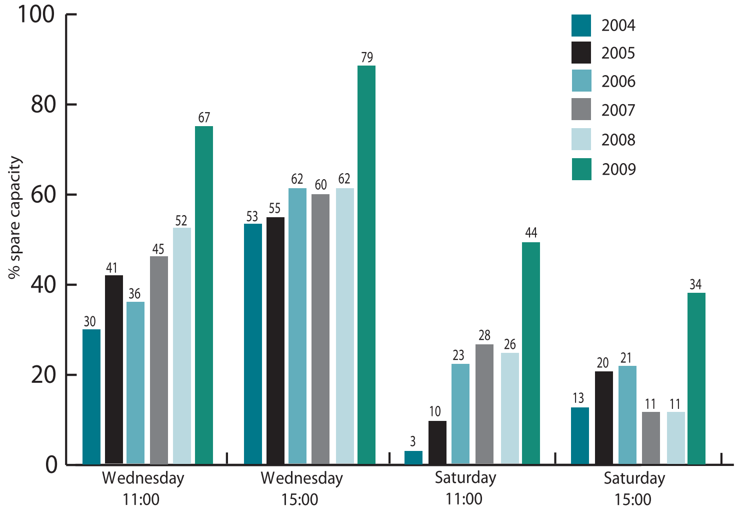
Parking for disabled people

Disabled people displaying a valid Blue Badge can park free of charge in all Southampton City Council surface car parks, in West Park Road multi-storey, and in on-street parking bays. There are also over 170 designated disabled on-street bays and clearly marked designated parking for people with disabilities at several car parks including

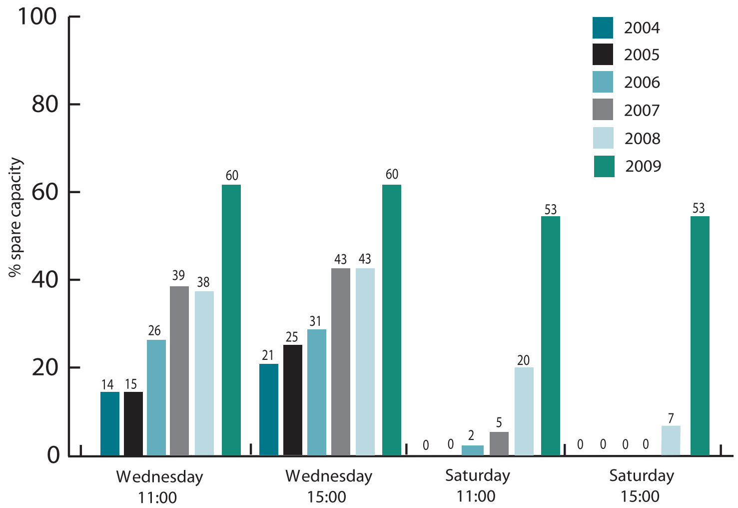
Car parking

WestQuay Podium and Multi-Storey, West Quay Retail Park, Toys ‘R’ Us and Lime Street. Bargate Street car park is specifically for users of the City Shopmobility scheme with 17 spaces, whilst 14 specific spaces in WestQuay Podium car park are designated for users of the WestQuay Shopmobility scheme.

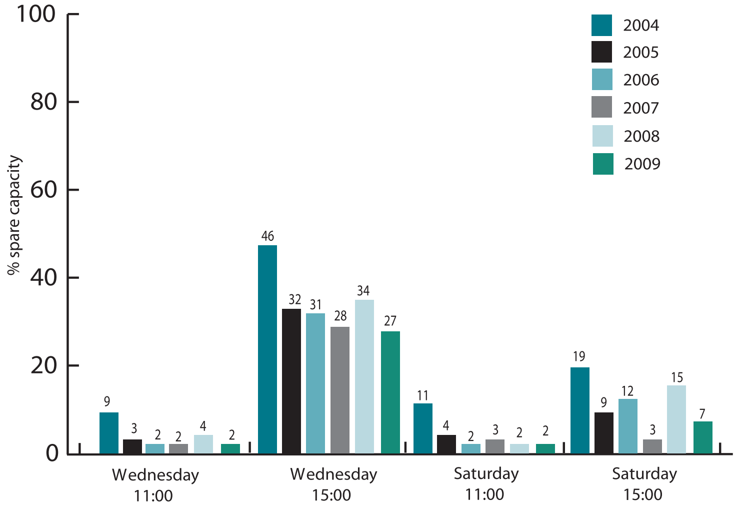
Marlands car park (810 spaces)



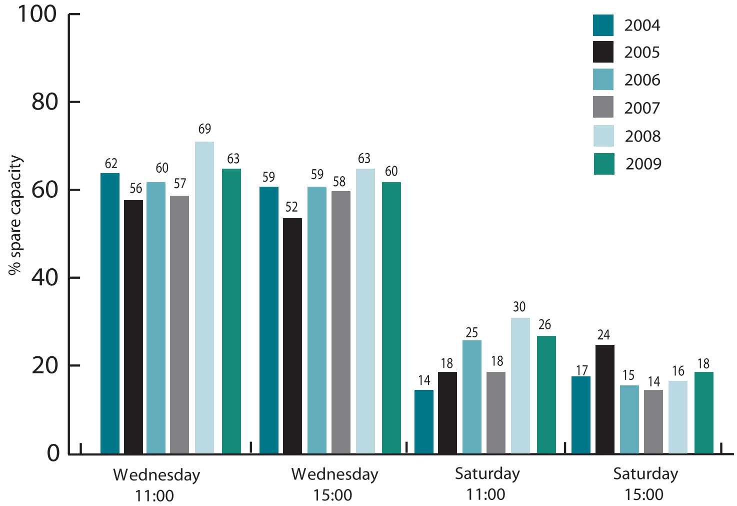
Eastgate Street car park (713 spaces)



WestQuay Podium (1,500 spaces)



WestQuay Multi-Storey (2,500 spaces)



Car Parking and Crime

CCTV cameras are located within the five city council run multi-storey car parks in the city centre (Marlands, Eastgate Street, Grosvenor Square, West Park Road and Bedford Place). Approximately 1.5m vehicles use these car parks each year. Data relating to crime levels within the car parks (see below) indicated a significant decrease when CCTV was introduced in 1998 and this has continued over subsequent years, which shows considerable success in the deterrent they provide.

Theft in Southampton City Council multi-storey car parks up to 2008/9

	1997/8	1998/9	1999/00	2000/1	--->	2008/9	2009/10
Theft **of** Motor Vehicles	29	4	0	0	--->	1	0
Theft **from** Motor Vehicles	177	20	17	3	--->	7	8

All these city council multi-storey car parks along with Bedford Place (previously Salisbury Street), Civic Centre Forecourt and Grosvenor Square have been awarded the Park Mark certificate through the ACPO Safer Parking scheme, 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 British Parking Association.

5 Diversity of use

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.

Land uses

	Use	Units 2009/10	(2008/09)	Sq metres 2009/10	(2008/09)	% of total sq m 2009/10	(2008/09)
A1*	Convenience	27	(20)	10,500	(7,960)	5	(4)
	Durables	235	(253)	131,010	(134,160)	63.5	(64)
	Services	49	(46)	6,780	(5,900)	3	(3)
A2	Financial services (counter services)	32	(36)	7,490	(8,250)	3.5	(4)
A3	Cafes and Restaurants	42	(41)	6,100	(5,450)	3	(2)
A4	Drinking establishments	20	(24)	7,760	(9,940)	4	(5)
A5	Hot food takeaways	25	(27)	2,940	(3,200)	1	(1.5)
C1	Hotels and hostels	1	(2)	910	(3,120)	0.5	(1.5)
B1	Business	19	(19)	3,830	(3,300)	2	(1.5)
D1	Non-residential institutions (incl education)	2	(2)	1,660	(1,660)	1	(0.5)
D2	Assembly and leisure (incl cinemas, theatres)	9	(6)	4,010	(2,200)	2	(1)
	Vacant offices	0	(1)	0	(480)	0	(0.5)
	Vacant retail	84	(80)	21,010	(22,510)	10	(11)
	Vacant Nightclub (D2)	1	(1)	380	(380)	0.5	(0.5)
	Vacant Hotel	1	(0)	2,210	(0)	1	(0)
	TOTAL	**552**	**(558)**	**206,590**	**208,510**	**100.0**	**(100.0)**

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

The Land Uses survey covered the following streets: Above Bar, ASDA and 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, Vincent's Walk, West Bargate, West Marlands Road, WestQuay, West Quay Retail Park, Windsor Terrace, York Walk.

Source: Experian

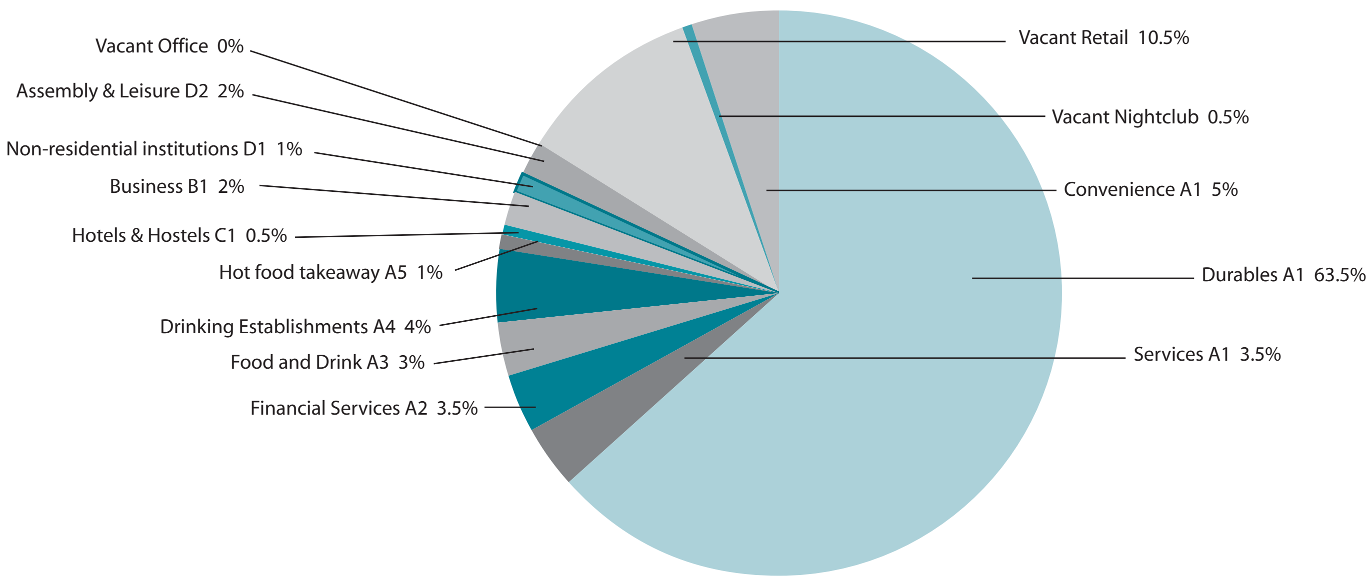
In terms of overall city centre uses, Experian data records a total floorspace of 206,590 sq m. The variation in floorspace between 2008/09 and 2009/10 is most likely due to reconfigurations in retail units including The Mall Marlands. The make-up of the land use mix continues to be fairly constant - retailers of durable goods are still the major players in Southampton's land use mix (63.5%), with leisure uses collectively (A3, A4, A5 and D2) comprising 10% of the total floorspace in the city centre and financial services 3.5%. Alongside retail, leisure uses have a significant presence in the city centre with a wide range of restaurants, coffee bars, public houses and nightclubs.

The vacant retail units within the city centre are worthy of comment. The data shows there to be a continuing high number of vacant units. The total vacant floorspace amounts to over 10% of the total floorspace, which accounts for a relatively significant proportion of the overall floorspace.

However, a number of units which have been vacant for a considerable period of time have now been occupied. Lidl now occupies 1,840 sq m on the High Street and Tesco Express 330 sq m on the High Street which were previously vacant. Six previously vacant retail units in Above Bar are now occupied by T Mobile, Blue Inc, Orange, Fabric Land, Bath Travel and Pijin. Three vacant shops in Hanover Buildings are now occupied along with the British Heart Foundation occupying a 870 sq m previously vacant unit on the corner of Queensway and Hanover Buildings. The Mall Marlands has now let five previously vacant units which are occupied by CeX Entertainment Exchange, Perfect Scents, Underground, Domo, The Shed and Pastabar. 1,350 sq m of previously vacant floorspace in Vincent's Walk is now occupied by Home Plus. WestQuay has four new stores - Goldstone, Hollister, Nauticalia and Red5. Capita now occupies 480 sq m of office space in Above Bar.

With regard to current vacant units, Bargate Shopping Centre has 21 vacant units and The Mall Marlands has 11. This compares to WestQuay which only has 3 vacant units. Pulse nightclub in Hanover Buildings remains vacant. With regard to vacant units, Central Government (PPS4) 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 or businesses move around. Concern should only be raised when it is apparent that the same units are remaining vacant over a long period of time. In Southampton it is clear that many previously vacant units are now occupied and a portion of the current vacant units are being refurbished. It is therefore considered that the city centre is performing relatively well in terms of the take up of floorspace.

Percentage share of total floor space



Source: Experian

Retail performance

General performance

Experian produces a league table of retail centres in the United Kingdom. One hundred and fifty retail centres were ranked in 2003/4, however data was not produced in 2004/5, 2005/6 and 2007/8. The 2009/10 Retail Ranking report provides comprehensive analysis and commentary on the best performing retail centres in Britain and also unveils the future landscape of Britain's retail centres by providing a detailed forecast to 2019.

The rankings are based upon a number of weighted key performance indicators including the size of the centre by floorspace, the number of major multiples, comparison stores and quality independent retailers. Negative factors, such as the amount of vacant floorspace, are also taken into account.

Between 2001/2 and 2003/4 Southampton was ranked 7, having risen from 45 in 1998/9 prior to the opening of WestQuay shopping centre. Data shows that between 2003/4 and 2008/9 the retail ranking dropped from 7 to 15, however 2009/10 has seen the city rise once again to 14.

Retail centre ranking - selected towns/ cities (Experian 2009 Retail Ranking)

Source: Experian

	2001/02	2002/03	2003/04	*	*	2006/07	*	2008/9	2009/10
Cardiff	6	6	8			11		10	6
Nottingham	4	4	5			5		6	7
Edinburgh	12	14	16			7		8	9
Norwich	8	9	9			10		13	12
Bristol	20	20	24			24		14	13
Southampton	7	7	7			13		15	14
Reading	9	8	12			16		18	18
Brighton	23	21	18			19		22	22
Kingston upon Thames	13	12	17			12		17	x
Guildford	16	17	21			35		47	x
Portsmouth	91	-	-			47		-	-
Basingstoke	140	31	34			-		-	-
Winchester	145	-	-			-		-	-
Bournemouth	155	-	-			-		-	-

*Data not available for 2004/05, 2005/06 or 2007/08 - Outside top 50 retail destinations x- data not available

Experian reports that it is evident from the 2009/10 retail rankings that the larger centres have been the most recession proof, but indicate that this has been at the expense of smaller, mid-town retail destinations. Alongside Southampton rising from 15 to 14, Cardiff (10 to 6), Bristol (14 to 13) and Norwich (13 to 12) have all seen rises. Centres including Nottingham (6 to 7) and Edinburgh (8 to 9) have however continued to see a fall in their rankings. Basingstoke, Winchester and Bournemouth have all been outside the top 50 since 2006/7. There continues to be only one retail centre in the south of the UK in the top 10 (excluding out of town centres) - Cardiff (6).

With regard to retail performance in the UK in 2009/10, Experian reports that it is both the existing larger retail centres and the new larger retail centres, that have opened up around the UK, that have delivered positive results. These larger centres have seen a net increase in their footfall and dwell times, with smaller centres seeing a decline. According to Experian it appears that shoppers are making less frequent shopping trips overall and when they do go shopping they prefer to spend their money and time at the larger centres.

It appears that Southampton has benefited from these trends. It retains a prominent place within the top retail centres in the south, just behind Cardiff (6) and Bristol (13) and continues to be the regional shopping capital.

With regard to longer term trends Experian reveals that the average size of a scheme due for completion by 2014 is below 20,000 sq m, compared to 32,500 sq m in 2008. This shows that developers, as well as putting many of their schemes on hold, have also scaled back their development plans. Due to this lack of large scale development the researchers expect to see little change in the rankings between now and 2014. However by 2019 Experian expects a number of larger-scale developments to have come on-line as confidence and growth returns to the economy. However, as the Health Check has shown, Southampton continues to attract investment with a number of retail and leisure developments coming forward in the short term. It will therefore be important to monitor what impact this will have on the retail ranking of the city in the coming years.

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. It must be noted that rents from 2004 onwards have been recalculated due to the way rents are now estimated, which has an effect on rent levels.

Southampton Zone A retail rents 2000-2009

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.

Historically rents rose dramatically in the second half of the 1990s. There was another steep increase in the late 1990s, when rents increased by 24%, which corresponded with the opening of WestQuay shopping centre. From 2002 until 2007 rents again rose consistently year on year, however from 2007 to 2008 rents remained constant at £375 per square foot until they dropped to £350 per square foot in 2008/9 representing a 7% drop from 2007/8 levels. Levels have remained constant from 2008/9 to 2009/10 at £350 per square foot. This levelling out of retail rents has also been seen in a number of other retail destinations with Edinburgh, Norwich, Reading, Brighton, Portsmouth, Winchester and Bournemouth all continuing to have retail rents consistent with 2008/9 levels. Out of the retail destinations survey only one, Guildford, has seen a rise in retail rents this year from £240 per square foot to £280 per square foot.

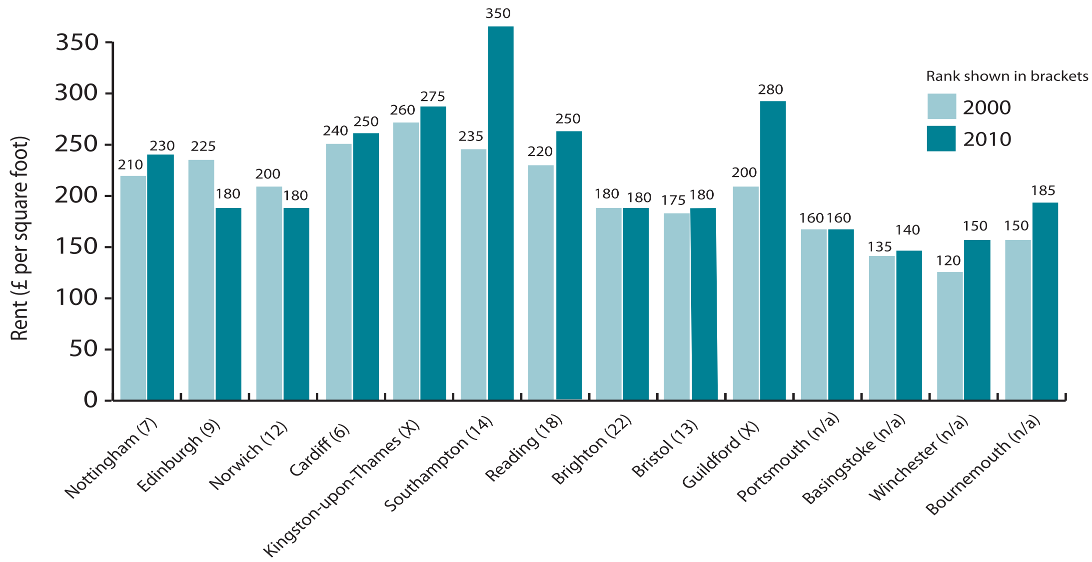
Rental figures for selected centres have been monitored on an ongoing basis. Since 2000, Southampton's rents compared to selected centres:

- have experienced the highest percentage increase (84%), whilst the rents in Southampton in 2000 were only lower than two of the centres monitored in the south east, including Kingston-upon-Thames and Cardiff. This demonstrates the impact from WestQuay;
- remain the highest, with rents at a level of £350 per square foot.

Southampton's levelling out of rents in 2009/10 could reflect the wider economic state of the retailing sector. Many other centres have seen either a stabilising or fall in £ per square foot since 2008/09 including Nottingham (down from £240 to £230), Cardiff (down from £275 to £250), Basingstoke (down from £150 to £140), Brighton (level at £180), Portsmouth (level at £160) and Bournemouth (level at £185). Southampton continues to lead the south east in terms of Zone A retail rents, which demonstrates that there is still strong demand for retail space in the city centre, despite the recent economic downturn (See graphs overleaf).

Retail performance

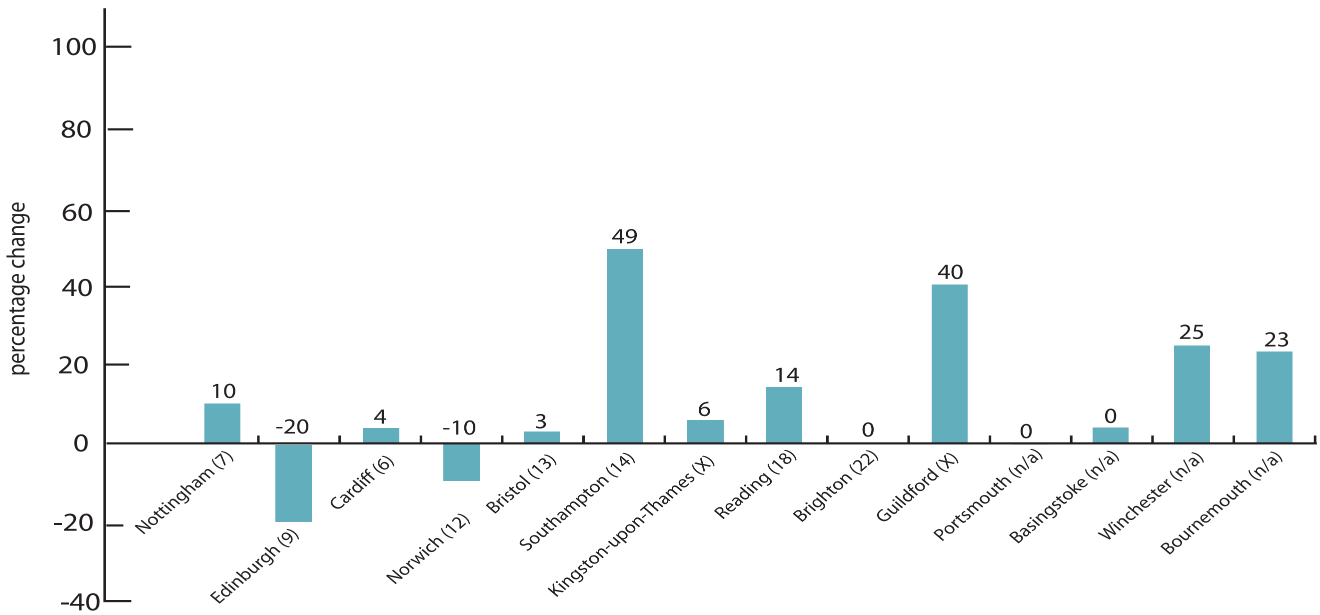
Zone A retail rents 2000 and 2010



Source: Colliers CRE

Change in Zone A retail rents since 2000

Rank shown in brackets x - data not available



Source: Colliers CRE

Investment

It was noted above how many vacant retail units have now been refurbished and occupied across the city centre. In addition, new development is still taking place in the city centre.

Outline planning permission was secured in April 2009 for Hammerson's £150 million Watermark WestQuay development. The project will see the old Pirelli factory site transformed into a unique mixed-use development. The scheme will comprise cafes and restaurants, retail, a multi-screen luxury cinema, 150 bed hotel and up to 200 residential units as well as providing new employment (Southampton City Council and Marketing Southampton, 2010).

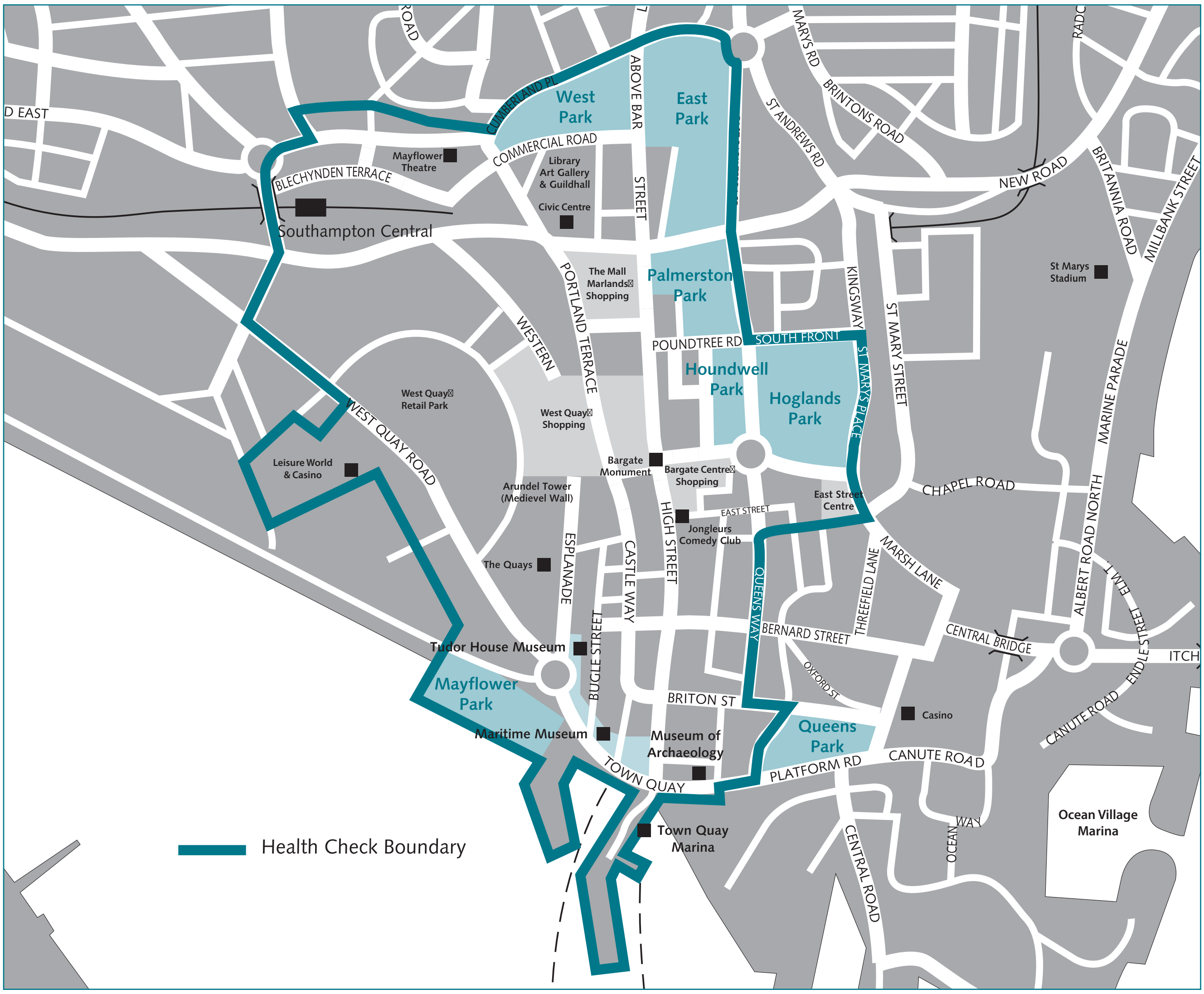
This demonstrates the continued investment that is taking place within Southampton which will assist in maintaining its regional position.

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. Whilst the retail ranking is important, the other aspects of Southampton life provide a comprehensive offer that is available in this regional city.

Leisure

The major **leisure venues** in the city centre are shown on the following Leisure and Culture Map.



Source: Southampton City Council

With the opening of WestQuay, came the arrival of café culture to Southampton. In addition to 100 retail units, WestQuay contains 20 catering outlets. However, such facilities have not only appeared within WestQuay, but also in the city centre in general - tables and chairs on the pavement continue to increase. The city council is keen to encourage growth in this use of the public realm following the investment in the retail and residential market over the past years as well as in the quality of the public realm.

Leisure venues within the main retail core are:

- 67 Restaurants/ Coffee bars/ Fast food & Takeaways
- 20 Public houses and Wine bars
- 2 Nightclubs
- 4 Amusement arcades
- 1 Hotel

Leisure & culture

The number and range of leisure uses in the city centre has stayed relatively consistent with the levels seen in 2008/9. There are 67 restaurants, coffee bars and fast food outlets and takeaways and 20 public houses and wine bars, which is a reduction on last year due to Ferryman & Firkin and Bar Risa both becoming vacant, Ad-Hoc becoming Kapa restaurant and Ocean & Collins becoming Bliss nightclub, for instance. Consistent with 2008/9 there are two nightclubs in the city centre, along with four amusement arcades. There is now only one hotel, down from two in 2008/9. However the vacant hotel, The Dolphin, is only empty whilst it is being refurbished by Mercure.

Southampton's **Central Parks** enhance the city centre by providing a vast green area of open space in the heart of the city. The parks were returned to their full Victorian glory following a £4.5 million refurbishment and enhancement scheme in 2000/1, funded by the Heritage Lottery Fund and the city council.

Throughout the year the city centre and adjacent areas have hosted a variety of **events and festivals** including the annual Southampton Boat Show (Mayflower Park) in September. The show boasts one of Europe's largest purpose built marinas with approximately 500 companies exhibiting, 300 boats afloat and almost 1,000 boats on display. The Bargate and Above Bar pedestrian precinct were alive with street entertainers, bands, roadshows and a host of different events throughout the year. During the Christmas period Above Bar pedestrian precinct hosted the annual German market that has become a feature of the festive season.

The renowned Mayflower theatre is the largest permanent **performance venue** within the city of Southampton. During 2009/10 the theatre was closed over a period of three months for the construction of a new, state of the art scene dock and “get-in”. If this were taken into account, the 15% drop in attendance to 345,479 would actually represent a 15% increase in attendance over a nine month period 2008/09. The theatre hosted 303 shows with the best selling for 2009/10 being The Sound of Music, Chicago, Thriller Live and Santa Claus and the Return of Jack Frost.

Attendance at The Mayflower 2004-2009

	2005/6	2006/7	2007/8	2008/9	2009/10
Attendance	433,831	396,720	429,802	403,384	345,479*
No of Performances	337	374	372	347	303
Average Attendance	1,287	1,061	1,155	1,162	1,140

Source: The Mayflower
* Nine months only

Culture

Cultural facilities within the Health Check area include the Central Library, the City Art Gallery and several museums. The Culture & Leisure Map (page 23) 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 a historical setting for shoppers and visitors alike.

Southampton City Council is working towards creating a cultural heart for the city with the creation of a **cultural quarter**. It will include the existing facilities of the City Art Gallery, BBC South Broadcasting House, the historic Central Parks, The Mayflower theatre, central Library, the Guildhall, One Guildhall Square, Southampton Solent University’s Sir James Matthews Building and the three new major developments of Guildhall Square, Sea City Museum and Southampton’s New Arts Complex.

In 2009/10 approximately 300,000 people visited the **Central Library**. In addition, staff answered 73,000 enquiries ranging from information about books to family history and there were around 117,000 log-ons using the free internet computers, making the library the biggest supplier of free access to the internet in the city. There were also 238 events and activities organised for the local community and approximately 2,000 people enrolled on courses at the Learning Centre. In November 2009 the library was the first in the city to introduce self service technology for customers.

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, ranging from ancient culture to the cutting-edge. The Gallery has over 3,800 works of art covering six centuries of European culture from the Italian Renaissance to French Impressionism. Its core collection of 20th century British art is internationally renowned and the collection has been designated by the government as having special national significance.

Visitors to Southampton City Art Gallery

2005/6	2006/7	2007/8	2008/9	2009/10
60,283	57,956	59,756	60,860	54,908
	-3.9%	+3.1%	+1.9%	-9.8%

Source: Southampton City Art Gallery

Thousands of visitors explore the gallery's exhibitions and displays every month and through a programme of educational activities, the gallery provides opportunities for greater access, involvement and understanding of art for people of all ages. A significant decline in visitor numbers during 2009/10 can partly be attributed to its closure for part of the easter holidays.

The core collection is complemented by temporary exhibitions which have included 'Writers of Influence, from Shakespeare to JK Rowling' from the National Portrait Gallery and 'Flashback' by Bridget Riley.

There are also several other **museums** within the Health Check area. Following the closure of the Tudor House Museum in April 2002 for restoration, the project is nearing completion. The Tudor House Museum and Garden will re-open in summer 2011 with improved access and visitor facilities, and a new cafe, whilst retaining its 500 year old charm. Westgate Hall (formally Tudor Merchants Hall) re-opens in October 2010, and includes a lift and other improved visitor facilities. Newly equipped for use as a teaching space and education centre, it is also available to hire for weddings, ceremonies and other events, and is a striking and memorable venue for meetings in the heart of the city's Old Town.

Work on the new Sea City museum, which will be built in the city's Grade II* listed Magistrates' Courts, starts in October 2010 with completion set for 2012.

The existing Maritime Museum visitor figures are slightly up on previous years and this can be attributed to the exhibition refresh which has encouraged repeat returns and new visitors. The Archaeology Museum figures are down on 2008/9 it is believed due to a re-organisation of Arts and Heritage services. The decision was made to open the museum to visitors four days a week so that the other three days could be used exclusively for delivering a wide ranging education programme and workshops to schools and the local community. Although this has resulted in less 'walk-in' visitors, the facility is being utilised by education and community groups.

Visitors to major Southampton City Council museums

	2005/6	2006/7	2007/8	2008/9	2009/10
Maritime Museum	54,008	51,397	37,774	34,162	36,350
Museum of Archaeology	10,779	12,535	14,514	6,231	2,119
Total	**64,787**	**63,932**	**52,288**	**40,393**	**38,469**

Source: SCC Historic Site Management

Acknowledgements

Associated British Ports	www.abports.co.uk
Colliers CRE	www.colliers.com
Cushman & Wakefield	www.cushwake.co.uk
Experian Ltd	www.experian.co.uk
Hampshire Police Crime Prevention	www.hampshire.police.co.uk
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PMRS	www.pmrs.co.uk
Red Funnel Group	www.redfunnel.co.uk
Savills	www.savills.com
Southampton Action for Access	www.southamptonaccess.org.uk
Southampton City Council Economic Development	www.invest-in-southampton.co.uk
Southampton City Council	www.southampton.gov.uk
Southampton City Shopmobility	www.southamptonvs.org.uk/shopmob.htm
Southampton International Airport	www.southamptonairport.com
South West Trains	www.southwesttrains.co.uk
Streets Ahead Southampton	www.southamptoncitycentre.co.uk
The Mayflower	www.mayflower.org.uk
WestQuay, Southampton	www.west-quay.co.uk
White Horse Ferries	www.hytheferry.co.uk

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A pdf copy of all the Health Checks from 2003/04 onwards are available at www.invest-in-southampton.co.uk/Economy/reports/health_checks.asp