Southampton City Centre

2006/2007

Health Check

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savills

southampton city centre management

Highlights

- There are an estimated 222,000 people living within the city boundary, amounting to approximately18% of the Hampshire area. Each year 6,000 Southampton graduates enter the labour market - 30% stay within Southampton.
- In 2004 Southampton's economy was worth over £4,233 million, 28% higher than in 2000. This was coupled with an increase in the number of businesses operating in the city, to around 7,500 (as at 2005), a 3.7% increase since the year 2000.
- The council have commenced a large project to improve the London Road area and completed landscaping works around The Bargate. These improvement works form part of a £41 million project to improve Southampton's street scene.
- Associated British Ports, which operates the Port of Southampton, have invested £9 million to upgrade the whole of the City Cruise Terminal, with work commencing in Spring 2007, whilst Royal Caribbean Cruise Lines have made the Port of Southampton their new home.
- Over the past five years, the number of people travelling at peak times into the city has dropped, but the number using cars has increased and public transport decreased. Cycle use has increased by up to 30%.
- The highest pedestrian flows in 2006 were again recorded on Above Bar pedestrian precinct at the entrance to WestQuay, whilst an increase in flow around the west of The Bargate is probably attributable to the environmental improvements in that area.
- Spare parking capacity seems to be increasing and reversing the previous trend of a loss of capacity. 73% of respondents to a survey indicated satisfaction with the number of spaces available, but this fell in commuters' car parks.
- The city's land use mix remains largely unchanged with durable goods representing the largest sector by floorspace (49%), with food and drink and services 9% and 7% respectively. A1convenience goods has seen a significant drop of almost 5,000sqm mainly attributed to the vacant Waitrose store in WestQuay.
- Southampton retail ranking moved down to 13, but this is a common picture in southern centres, and the city is still the regional shopping capital.
- This year retail rents have remained at the same level as 2006, and whilst Southampton still has the highest retail rents in the region, other centres have grown.
- The Mall Marlands was ranked number 29 in the 'Top 50 Best Places to Work UK' survey of 2006, published in the Financial Times.
- Southampton hosted a number of cultural events including EAT (Emerging Artistic Talent) Southampton - a three day arts festival, whilst The Bargate reopened as a contemporary art gallery and hosted 'twonotten', the first digital arts festival in the South of England.
- Of the various safety and security initiatives in the city centre, Best Bar None saw over 100 entrants, being the highest number achieved in any city outside Manchester, and a Student Safety DVD produced in Southampton has been in high demand around the country.
- 71% of people are satisfied with the council's achievements in clearing litter and refuse, compared to 54% in 2003 and Southampton was identified by The Guardian as in the top 10 of all local authorities on green issues and in steps taken to cut CO2 emissions.

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1 Introduction to the Health Check

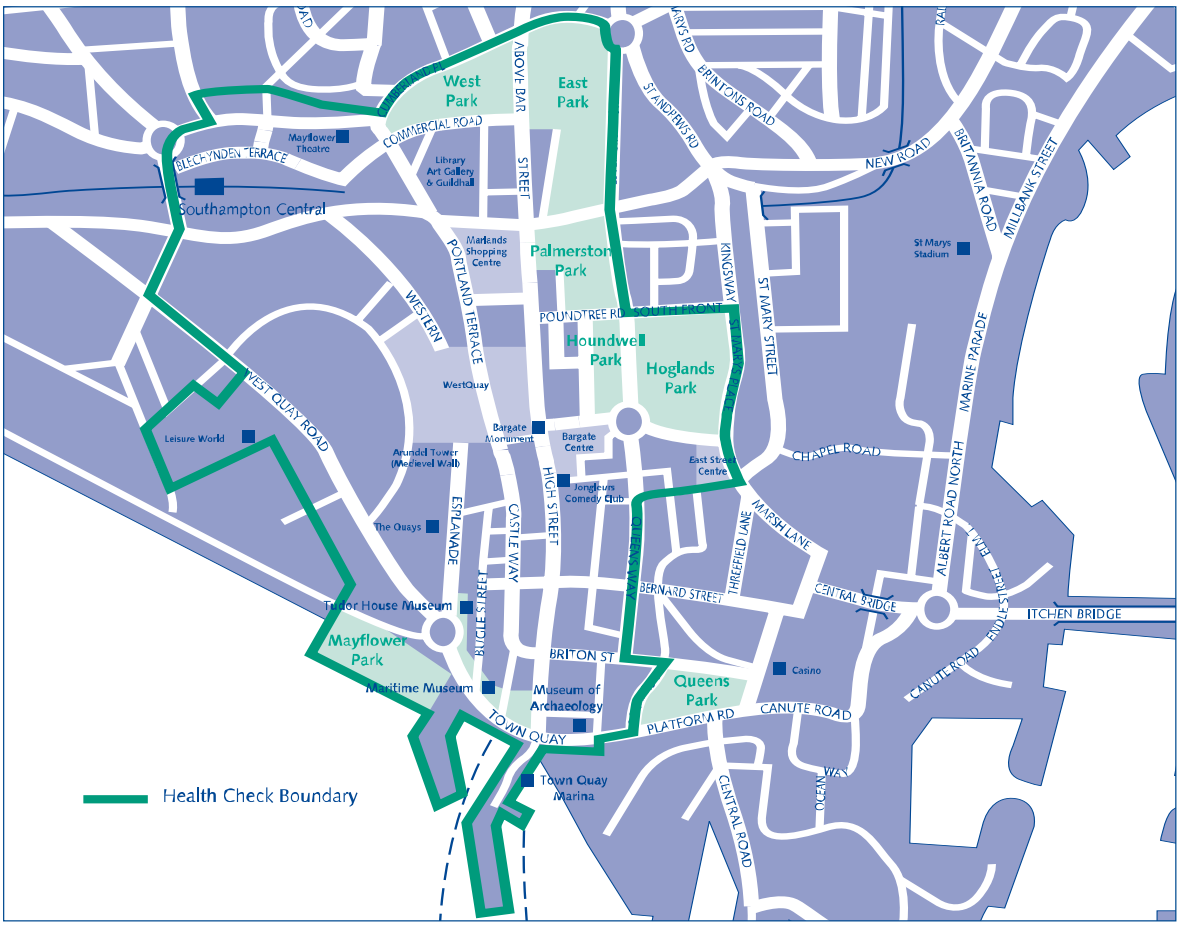
This document, prepared by Southampton City Centre Management, reports on the results of the tenth annual City Centre Health Check undertaken between April 2006 and March 2007.

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 (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 development outlined in Southampton City Council's 'City Centre Vision 2' and through the implementation of the 'City Local Plan Review' major sites.

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.



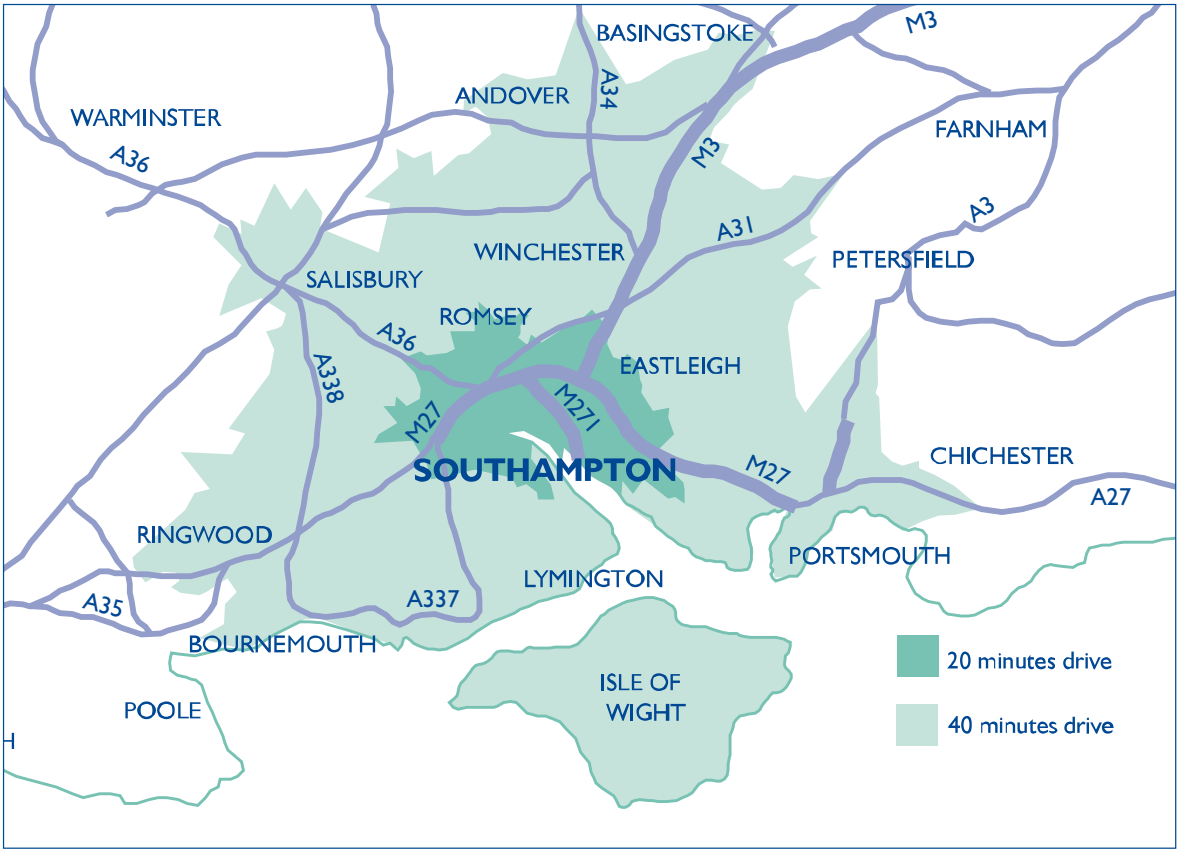
Source: Southampton City Council

2 City snapshot

There are an estimated 222,000 people living within the city boundary, amounting to 17.62% of the Hampshire area (Source: Southampton City Council). At the last count, an estimated 400,000 lived within a 20 minute drive and just under 1.5million within 40 minutes. Of Southampton's population, around 67% are of working age, higher than both the South East region's rate and the national level, which are 61% and 63% respectively. The number of economically active females is nearly 69,000, whilst there are 80,000 economically active males.

There is a student population in Southampton of around 41,500, 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 to seek career opportunities. In 2005 Southampton Solent University gained status as an official university and this year appointed its first Chancellor. Southampton Solent University is an important asset to the city centre in terms of education, business and innovation. It is also showing its merits in the arts, and in October worked with Southampton City Council to celebrate Black History Month, including a Film Festival and exhibition of black icons.

In 2004 Southampton's economy was worth over £4,233m, 28.16% higher than in 2000 (Source: Southampton City Council). The growth in the economy is supported by the number of businesses operating in the city growing to around 7,500 (as at 2005), a 3.7% increase since 2000. 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 health sector. 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. Major private employers include Skandia Life (UK HQ), Ordnance Survey, Ford Motor Company, Newsquest, First Hampshire and Dorset, Centrica, P&O Cruises Ltd and John Lewis, all employing over 1,000 people. The largest public sector employers in Southampton include the NHS Hospital Trusts and Southampton City Council.



Source: Savills Residential Development Southampton

Physical investment in the city is important in maintaining a good quality environment and attracting further investment into the city. The council has commenced a large project to improve the London Road area of the city centre. Phase one started in May 2006, with phase two starting in May 2007. The council's proposals are for an uncluttered design for London Road to create a safe street with a more pleasant environment and more European feel. A key element of the scheme is to reduce traffic through London Road. These improvement works form part of a £41million project to improve Southampton's street scene.

Southampton also maintained its presence as a regional centre for shopping, business, leisure and culture this year and the improvement to the streetscene was aided by a series of markets in Southampton city centre, adding to the vitality of the city. A weekly Friday market at The Bargate, which includes 80 continental style stalls selling a range of products, has proved to be a great success and was featured as an example of best practice in the National Market Trader magazine this year. Based on this reputation, the market has been visited by a number of market operators as an example of how to run a successful market. During the year these markets gained consent to extend along the east side of The Bargate to encourage shoppers to visit shops and stalls on both sides of the monument. The market has proved to be hugely popular as demonstrated by the number of people on the waiting list to operate a stall.

Southampton also hosted its first Hampshire Farmers' Market with over 50 stallholders attending. The city is now added onto the programme for this market and hosts regular events. For the festive period, City Centre Management again organised a German Christmas Market in Above Bar precinct, with the market larger in scale than the two previous years.

On the larger scale retail front, The Mall Marlands, also had an encouraging year. The centre was ranked number 29 in the 'Top 50 Best Places to Work UK' survey of 2006, published in the Financial Times.

Other advancements in the physical development of the city include the submission and approval of planning applications by MDL and Linden Homes for a £70m mixed-use waterfront scheme at Ocean Village, including a 225 bedroom hotel, 130 residential units, live-work and commercial units and a Marine Innovation Centre.

Southampton City Council also made advancements in the area of public transport this year, reflected in the council's vision outlined in its second Local Transport Plan. The plan focuses on improving the streets of Southampton to create a smarter, safer, cleaner city. One key objective is to reduce the level of car travel within the city through promoting the use of public transport. The plan includes a section on Park and Ride, the first scheme expected to be up and running by 2010. A further two bus interchanges are also proposed in the plan. For the first time, the council has also produced an Active Travel Plan in response to health and obesity issues in the UK with the aim being to encourage local people to engage in more active ways of getting to places.

With regard to transport funding and awards, the council secured £420,000 funding from Central Government which allowed for enhancement to bus service U1 (Dock Gate 4-City Centre-Portswood-University-Airport) meaning that these buses are now able to operate every 15 minutes (20 minutes at the weekend), whilst Southampton City Council's parking service was awarded ISO 9000 for the fourth year running, for providing streamlined procedures for all key activities.

Sustainable transport was also important this year as a new pay-as-you-go car hire service called 'WhizzGo' commenced, working in partnership with Southampton City Council. The aim of the initiative is to reduce congestion and pollution in the city. There are currently WhizzGo car parks at four locations including the Civic Centre, Central Train Station, College Street car park and Bedford Place car park. Recent research shows that one car club car could replace up to six privately owned cars.

This all exemplifies 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 detailed progress towards this goal and this was also highlighted in the UK Cities survey where Southampton scored number 13 overall. The highest scores were gained in 'availability and cost of car parking facilities' (2nd place), 'freedom from pollution' (3rd place), 'quality of life for employees' (5th place) and 'international transport links' (6th place).

3 Accessibility

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. 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 operate between Romsey and Totton (via Chandlers Ford) and Southampton and Portsmouth (via Fareham).

Over the past year the number of rail journeys either starting or ending at Southampton Central has increased by just over 5%. Value for money fares are available 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

2002/3	2003/4	2004/5	2005/6	2006/7
4,377,000	4,542,000	4,652,000	4,844,000	5,092,000
	+3.8%	+2.4%	+4.1%	+5.1%

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; only minor timing changes have occurred in the past year. The numbers travelling to Southampton by National Express coaches have increased consistently over the past few years and, whilst not as high this year, there has still been an increase in passengers travelling by coach. Regional bus operators also provide frequent services to various destinations within the South of England.

Passenger journeys on National Express Coaches arriving in Southampton

2002/3	2003/4	2004/5	2005/6	2006/7
143,000	154,000	166,000	177,000	179,000
	+7.7%	+7.8%	+6.6%	+1.1%

Source: National Express

On a more distant perspective, **Southampton International Airport** is one of the fastest growing European regional airports. Passenger numbers have increased by 4.5% this year, attracting over 1,945,500 passengers during 2006/7. This is about a 40% increase compared to the number of passengers three years ago. Southampton 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 from 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.

Passengers through Southampton International Airport

2002/3	2003/4	2004/5	2005/6	2006/7
794,441	1,373,035	1,550,000	1,861,856	1,945,500
	+72.8%	+12.9%	+20.1%	+4.5%

Source: Southampton International Airport

Southampton Airport's route network is continually growing and now serves a total of 47 destinations in 14 European countries, as compared to 42 last year. Balkan Holidays began operations to Bulgaria in the summer of 2006 , whilst BMI Regional commenced a route to Amsterdam and Inghams Holidays started operating package holidays to Innsbruck in the winter of 2006. Additionally, in spring 2007 the new environmentally friendly Embraer 195 aircraft began operation at Southampton Airport with Flybe. This aircraft uses 20% less fuel and has 35% reduction in noise levels compared to the BAe 146 aircraft it is replacing and which are currently being phased-out by Flybe.

Southampton Airport has received two major accolades: awarded silver in Top UK Airport 2005 by readers of Wanderlust Magazine and voted one of the top three airports in the world alongside Singapore 'Changi' and Dubai by Daily Telegraph readers.

In winter 2006, Southampton Airport published its masterplan outlining its vision for the next 25 years. The masterplan details how the airport intends to meet growing demand for regional airport travel and is split into two time periods - up to 2015 and 2015-2030. Publication of the masterplan follows a programme of public consultation.

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. Over the last 12 months Red Funnel has continued to show strong levels of growth consistent with recent years, although the growth in the number of vehicles is not as great as in the period 2005/6. The trend from recent years of Red Funnel growing faster than the total Isle of Wight market has also continued in both passenger and vehicle traffic.

Passengers and vehicles on Red Funnel crossings

	2002/3	2003/4	2004/5	2005/6	2006/7
Passengers	2,771,083	2,873,670	2,966,305	3,036,273	3,114,926
		+3.7%	+3.2%	+2.4%	+2.6%
Vehicles	523,659	547,908	586,438	647,311	665,539
		+4.6%	+7.0%	+10.4%	+2.8%

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 a record 737,724 deep-sea cruise passengers in 2006, an increase of 5% over 2005. Cruise business at the Port of Southampton has almost doubled over the last five years and accounts for slightly more than 50% of the UK market. In 2006/7 Royal Caribbean Cruise Lines made the Port of Southampton their new home and some of the largest cruise ships in the world, including Freedom of the Seas and Liberty, have called into the port.

Internationally, Southampton is the largest of the Northern European Cruise Ports and is 1.75 times larger than the next largest (Copenhagen). However, it is still well behind the Mediterranean ports in passenger numbers, having less than half that of Barcelona, about two-thirds the number of Venice, and about three quarters the number of Napoli and Genoa. This can be accounted for by the fact that, unlike these southern European ports, Southampton is not a destination port. Southampton is however, picking up the new growing numbers of first time cruisers sampling short cruises of less than a weeks duration to Continental Europe.

Number of cruise passengers handled by the Port of Southampton

2002	2003	2004	2005	2006
390,000	470,000	550,000	702,000	737,000
	+21%	+17%	+28%	+5%

Source: Associated British Ports

To cater for the fast growing cruise market, Associated British Ports, which operates the port, has invested £9m to upgrade the whole of the City Cruise Terminal. The 23 weeks of construction work was completed in April 2007 allowing the terminal to host the larger modern cruise ships such as the RCCL's Navigator of the Seas. During April 2007 the Port of Southampton was to have 26 cruise ships on berths including the QM2 and the world's largest cruise ship, Liberty of the Sea.

The city now has three dedicated cruise terminals, with first class reception facilities, making 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 having confirmed Southampton as their principal UK cruise port until 2013 and Cunard until 2009. The port also hosts the promotion of new vessels, naming ceremonies and promotional calls of many cruise lines.

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, with the local economic impact for Southampton estimated in 2006 to be over £200m and 2,400 jobs, working out at £737 per cruise passenger (Source: Southern Daily Echo).

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 Above Bar pedestrian precinct. 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 now 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 10 minutes during shopping hours and 30 minutes at other times. Surveys carried out show over one million passengers use the service annually. The City Loop free bus service also connects Grosvenor Square and Salisbury Street car parks to the Royal South Hants Hospital, Southampton Solent University and the city centre, running every 20 minutes between 0800 and 1820.

The city council subsidises **Nightlink** services operating to the east, west and north of the city, which run every 30 minutes with half hourly or hourly services between 00.00 and 03.30 on Friday and Saturday nights. These complement the services to Winchester, Romsey, Waterside, Hedge End, Totton and Eastleigh (operated commercially by Solent Blue Line) and the services to Botley and Hamble (operated by First and funded by Eastleigh Borough Council), which run hourly up to 03.30 on Friday and Saturday nights.

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 (Unilink) 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 number of low-floor buses on their services.

Taxis are widely available. Principal ranks can be found at key strategic points (see Transport Map on page 13). In 2007 25% of Hackney Carriages are now wheelchair accessible. Private Hire Taxis have risen slightly from 400 to 410. Marshals are now placed on the rank at Above Bar Street to supervise late night customers, which has proved very successful, and is to be introduced elsewhere in the near future.

The city centre is a key destination for **cyclists** and the city council is actively engaged in health promotion and sustainable travel. The city is still expanding its network for cyclists and pedestrians; this year several street audits have been undertaken with "Living Streets" that will develop into plans for enhancement to those neighbourhoods and communities. This would include better footways, crossing and access points and improvements to the street scene, with less clutter from signs, and graffiti removal.

The council's Cycling Development team is working in partnership with Sport England and The NHS Primary Care Trust to promote cycling and are currently awaiting an announcement to see if the Council has been successful in winning a lottery bid for a cycling health scheme that will be worth £1m over four years.

On the theme of cycling, Southampton City Patrol will be out on their new fleet of cycles providing a watchful eye on the city and providing an important role of support to the Police.

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 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 (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.

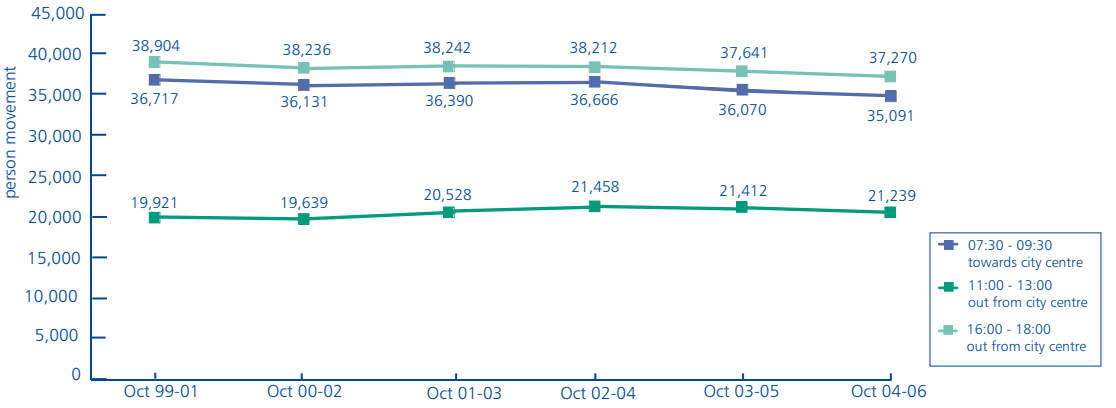
The graphs and tables indicate that traffic flow is approximately 75% higher during peak hours compared to off-peak times. Also, the types of transport used differ between peak and off-peak with pedal cycle, bus, rail and ferry particularly strong commuter forms of transport.

The numbers entering the city in the morning peak appear to have dropped in the past few years despite a previously slight upward trend. The numbers leaving in the evening peak have also continued to drop over the years. Over the past five years these figures have fallen by 2.9% and 2.5% respectively. Additionally, the number of people leaving the city at lunchtime has started to fall slightly, after increasing by 7.5% over the previous five years.

This suggests that either fewer people are coming into the city or people are travelling outside the usual perceived peak hours whether for work or not, which could be for a host of reasons including more flexible work patterns, a greater incidence of working from home a rise in city centre living and working etc.

The traffic flows chart also shows a convergence between peak and non-peak travel into and out of the city, which again correlates with the view that there is not as much of a peak rush hour in one direction as compared to a few years ago.

Total traffic flows into and out of Southampton city centre



Source: Southampton City Council

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 (with slightly less at lunchtime) and pedestrians between one tenth and one sixth, increasing during the day. The relative shares of individual modes has remained similar to previous years with the private car remaining the main component with around 60% of the share, followed by the bus and pedestrians at between one tenth and one fifth.

Over the past five years, the main change in trends has been that public transport, particularly in the form of buses has lost some share. In the last year though, there has been a slight rise in the lunchtime share for public transport, mainly caused by bus share increasing slightly at lunchtime and in the evening peak. Pedestrian movements have decreased (in absolute terms and percentage terms) and this trend has been occurring for the past three years. In terms of private cars and cycles however, the percentage share has been increasing over the past five years.

Examining the actual numbers travelling by the modes, there are differences with the overall figures whereby it is clear that the numbers travelling by pedal cycle and car have increased. Given the dropping overall numbers and rising car use, this is particularly concerning, although the greater number of cars than cycles means that the increase in cycle use could be seen as a more significant change. Indeed, cycle use in absolute numbers has increased by between 15 and 30% over the past five years, whilst car use has in absolute numbers increased by between 0 and 15%. This is concerning given the decreasing number of people travelling overall, but the rise in cycle use is positive.

To investigate these movements more fully, it would be useful to review travel modes and numbers throughout the day and in both directions. It would be especially useful in the future to analyse reverse peak-time flows of those leaving the city centre in the morning and coming into the city centre in the evening. 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.

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

	2000 – 2002	2001 – 2003	2002 – 2004	2003 – 2005	2004 – 2006
Light vehicle	21,531 (59.6%)	21,559 (59.2%)	21,988 (60.0%)	21,821 (60.5%)	21,625 61.6%)
Motor cycle	382 (1.1%)	368 (1.0%)	375 (1.0%)	359 (1.0%)	363 (1.0%)
Pedal cycle	566 (1.6%)	656 (1.8%)	728 (2.0%)	750 (2.1%)	733 (2.1%)
Total private	**22,479 (62.2%)**	**22,583 (62.1%)**	**23,091 (63.0%)**	**22,930 (63.6%)**	**22,721 (64.8%)**
Bus	7,267 (20.1%)	7,230 (19.9%)	6,751 (18.4%)	6,453 (17.9%)	6,010 (17.1%)
Rail	1,770 (4.9%)	1,854 (5.1%)	1,865 (5.1%)	1,844 (5.1%)	1,734 (4.9%)
Ferry	873 (2.4%)	897 (2.5%)	880 (2.4%)	874 (2.4%)	822 (2.3%)
Total public	**9,910 (27.4%)**	**9,981 (27.4%)**	**9,496 (25.9%)**	**9,171 (25.4%)**	**8,566 (24.4%)**
Pedestrian	3,742 (10.4%)	3,826 (10.5%)	4,079 (11.1%)	3,969 (11.0%)	3,804 (10.8%)
Overall Total	**36,131 (100%)**	**36,390 (100%)**	**36,666 (100%)**	**36,070 (100%)**	**35,091 (100%)**

Source: Southampton City Council

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

	2000 – 2002		2001 – 2003		2002 – 2004		2003 – 2005		2004 – 2006	
Light vehicle	12,196	(62.1%)	12,755	(62.1%)	13,533	(63.1%)	13,874	(64.8%)	13,926	(65.6%)
Motor cycle	130	(0.7%)	138	(0.7%)	147	(0.7%)	145	(0.7%)	141	(0.7%)
Pedal cycle	195	(1.0%)	216	(1.1%)	237	(1.1%)	242	(1.1%)	363	(1.1%)
Total private	**12,521**	**(63.8%**	**13,109**	**(63.9%)**	**13,917**	**(64.9%)**	**14,261**	**(66.6%)**	**14,430**	**(67.5%)**
Bus	3,027	(15.4%)	2,937	(14.3%)	2,968	(13.8%)	2,935	(13.7%)	3,016	(14.2%)
Rail	521	(2.7%)	613	(3.0%)	627	(2.9%)	632	(3.0%)	566	(2.7%)
Ferry	198	(1.0%)	213	(1.0%)	205	(1.0%)	207	(1.0%)	201	(0.9%)
Total public	**3,746**	**(19.1%)**	**3,763**	**(18.3%)**	**3,800**	**(17.7%)**	**3,774**	**(17.6%)**	**3,783**	**(17.7%)**
Pedestrian	3,372	(17.2%)	3,656	(17.8%)	3,741	(17.4%)	3,377	(15.8%)	3,153	(14.8%)
Overall Total	**19,639**	**(100%)**	**20,528**	**(100%)**	**21,458**	**(100.0%)**	**21,412**	**(100%)**	**21,366**	**(100%)**

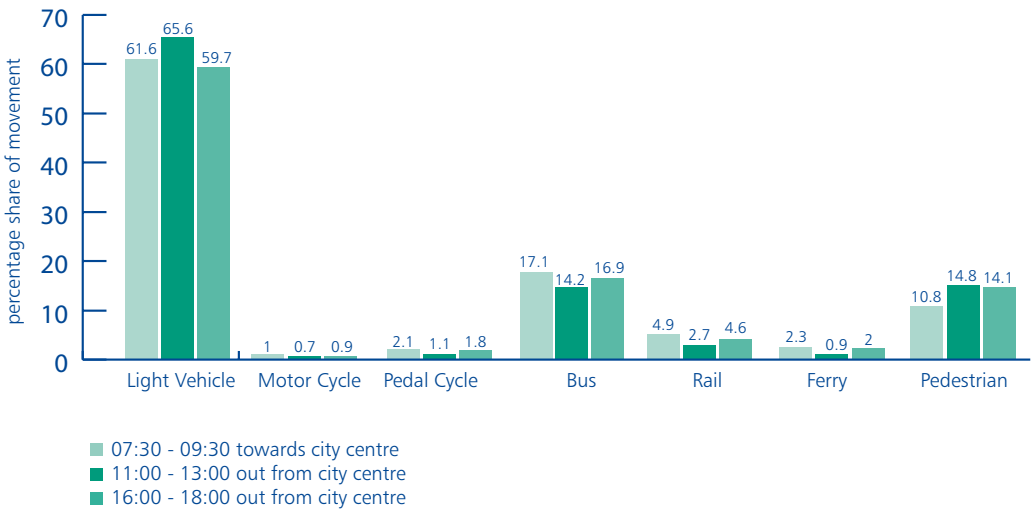
Source: Southampton City Council

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

	2000 – 2002		2001 – 2003		2002 – 2004		2003 – 2005		2004 – 2006	
Light vehicle	21,917	(57.3%)	21,985	(57.5%)	22,324	(58.4%)	22,125	(58.8%)	22,242	(59.7%)
Motor cycle	384	(1.0%)	403	(1.1%)	381	(1.0%)	365	(1.0%)	347	(0.9%)
Pedal cycle	571	(1.5%)	642	(1.6%)	658	(1.7%)	660	(1.8%)	653	(1.8%)
Total private	**22,872**	**(59.8%)**	**23,030**	**(60.2%)**	**23,363**	**(61.1%)**	**23,150**	**(61.5%)**	**23,242**	**(62.4%)**
Bus	7,114	(18.6%)	6,494	(17.0%)	6,229	(16.3%)	6,234	(16.6%)	6,316	(16.9%)
Rail	1,798	(4.7%)	1,874	(4.9%)	1,909	(5.0%)	1,901	(5.1%)	1,735	(4.6%)
Ferry	817	(2.1%)	886	(2.3%)	823	(2.2%)	839	(2.2%)	729	(4.6%)
Total public	**9,729**	**(25.4%)**	**9,254**	**(24.2%)**	**8,961**	**(23.5%)**	**8,974**	**(23.8%)**	**8,780**	**(23.5%)**
Pedestrian	5,635	(14.7%)	5,958	(15.6%)	5,888	(15.4%)	5,517	(14.7%)	5,258	(14.1%)
Overall Total	**38,236**	**(100%)**	**38,242**	**(100%)**	**38,212**	**(100.0%)**	**37,641**	**(100%)**	**37,280**	**(100%)**

Source: Southampton City Council

Split in movement over time into and out of city centre, 2004-2006



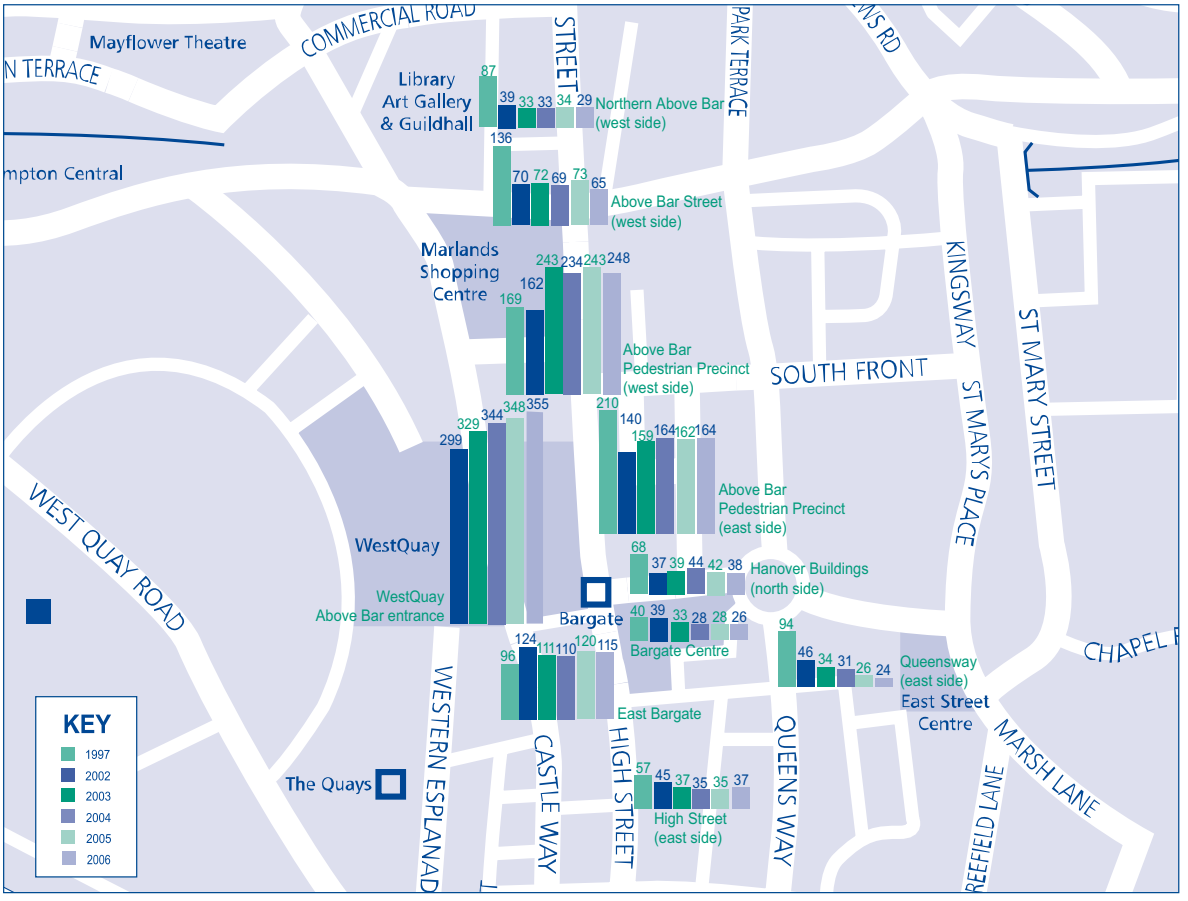
Source: Southampton City Council

Pedestrian movement within the city centre

In 2006, Pedestrian Market Research Services (PMRS) were once again commissioned by City Centre Management to carry out a set of pedestrian flow counts in Southampton following on from previous years. The flows were measured throughout the city centre with 10 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 and so these indicate the locational hierarchy throughout the centre. The map below sets out these results.

Average pedestrian flows 1997-2006

(survey dates 6/7 June 1997, 21/22 June 2002, 20/21 June 2003, 18/19 June 2004, 17/18 June 2005 and 16/17 June 2006)



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 North South Spine.

In 2006, the highest flow in terms of the selected points was recorded on Above Bar pedestrian precinct at the entrance to WestQuay, and these were now at over three and a half times the city centre average. Slightly north of the WestQuay entrance, outside River Island, footfall decreases from 355 to 248 but this is still considerably higher relative to the footfall in the late 1990s (169) at this point. East Bargate has seen a slight increase since WestQuay opened.

Elsewhere, footfall has dropped relatively since 1997. Indeed, on the opposite side of the precinct from the entrance to WestQuay (the pre-WestQuay high), not only is footfall currently less than half that outside WestQuay (164 rather than 355) but this has fallen from the original figure of 210 in 1997. On Northern Above Bar Street and Above Bar Street decreases have been marked (eg 87 to 29), as have decreased outside Debenhams (94 to 24).

As in previous years, the picture has remained similar and, if anything, worsened whereby the west side of the pedestrian precinct has seen significant increases since WestQuay opened, whilst footfall on the eastern side of the precinct is not only less than before WestQuay opened, but remains under half that of the western equivalent. Allied to this, extreme points to the north, south and east have all fallen significantly and Northern Above Bar and Above Bar Street are continuing to fall over the past year whilst others have remained relatively stable.

This reinforces the view that a gravitational change has taken place as people concentrate more in the area around WestQuay shopping centre and the western side of the precinct. It is assumed that this is directly attributable to the pull of WestQuay and its car parking facilities, although the impact of the footway to the western side of the precinct continuing further north without interruption by roadways, could also play a key role. This has been investigated by monitoring the impact of the closure of the road to the west of The Bargate between the 2005 and 2006 surveys. In 2006, East Bargate, where figures had increased when WestQuay opened, had been increasing but saw a small drop in footfall this year from 120 to 115, whilst flows outside the Argos store to the west, where pedestrianisation took place in late 2005, have conversely increased from 101 to 130.

It therefore appears that there is a mix of factors from draw and ease of movement which affect footfall around the city centre, one of which is pedestrianisation.

Accessibility for disabled people

Accessibility 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. To aid accessibility for disabled people within the city centre there are two Shopmobility schemes in operation, WestQuay Shopmobility in the shopping centre and Southampton City Shopmobility 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.

Total Registered at Shopmobility schemes 2002-2007

	Southampton City Shopmobility (Castle Way)	WestQuay Shopmobility	Total
2002/3	1,851	3,926	5,777
2003/4	2,227	5,166	7,393 (+28.0%)
2004/5	2,587	6,430	9,017 (+22.0%)
2005/6	2,820	7,525	10,345 (+14.7%)
2006/7	3,366	8,601	11,967 (+15.7%)

Source: Southampton City Shopmobility and WestQuay Shopmobility

The table shows that both shopmobility schemes continue to perform well, with total registrations increasing again and at a slightly higher rate than last year (almost 16%). Whilst there has been a slight drop in the increase in new registrations, this is to be expected in a service of this kind. However, the data shows that despite having been in existence now for some years at both locations, there is a continued increase in demand year on year.

It has been reported that the closure of Waitrose at WestQuay had an impact on the WestQuay shopmobility scheme whilst the opening of the Friday Bargate markets has seen Friday usage at Southampton City Shopmobility increase by 30%. City Shopmobility also held an outreach event at the city's Garden Festival, whilst the two schemes, in partnership with Southampton Action for Access (SAFA), ran a living with disability day to raise awareness of this issue. The provision of Shopmobility schemes in Southampton is an important aspect of making the city accessible to all.

In addition to this, SAFA in conjunction with the two shopmobility schemes, have audited 39 shops, cafes and restaurants for their accessibility including some new premises such as Argos at West Quay Retail Park. The access guide now has over 300 businesses on it (compared to 261 last year and 200 the previous year) as well as 134 city council services and transport and parking information. SAFA's website provides information gathered from the audits as free publicity and hence the incentive to participate in the surveys.

4 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 2006/07
	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	210
9	Salisbury Street	284
	TOTAL (weekend numbers)	**7,682**
	SURFACE CAR PARKS	
10	West Quay Retail Park (private)	693
11	Toys 'R' Us (private)	310
12	The Quays (North)	114
13	Civic Centre f/court (w/ends only)	72
14	Castle Way	76
15	Guildhall weekends	57
	Guildhall weekdays	26
16	Albion Place	51
17	Wyndham Place	24
18	Commercial Road	11
19	Bargate Street	*17
20	Mayflower Park	208
21	Lime Street	217
22	Southbrook Road	113
23	Gloucester Square	90
24	Grosvenor Square (North)	88
25	The Quays (South)	88
26	NCP Back of the Walls (private)	76
27	Harbour Parade	66
28	Leisure World (private)	885
29	Kings Park Road	77
	TOTAL (weekend numbers)	**3,333**
	GRAND TOTAL (weekend numbers)	**11,015**

* Shopmobility users only

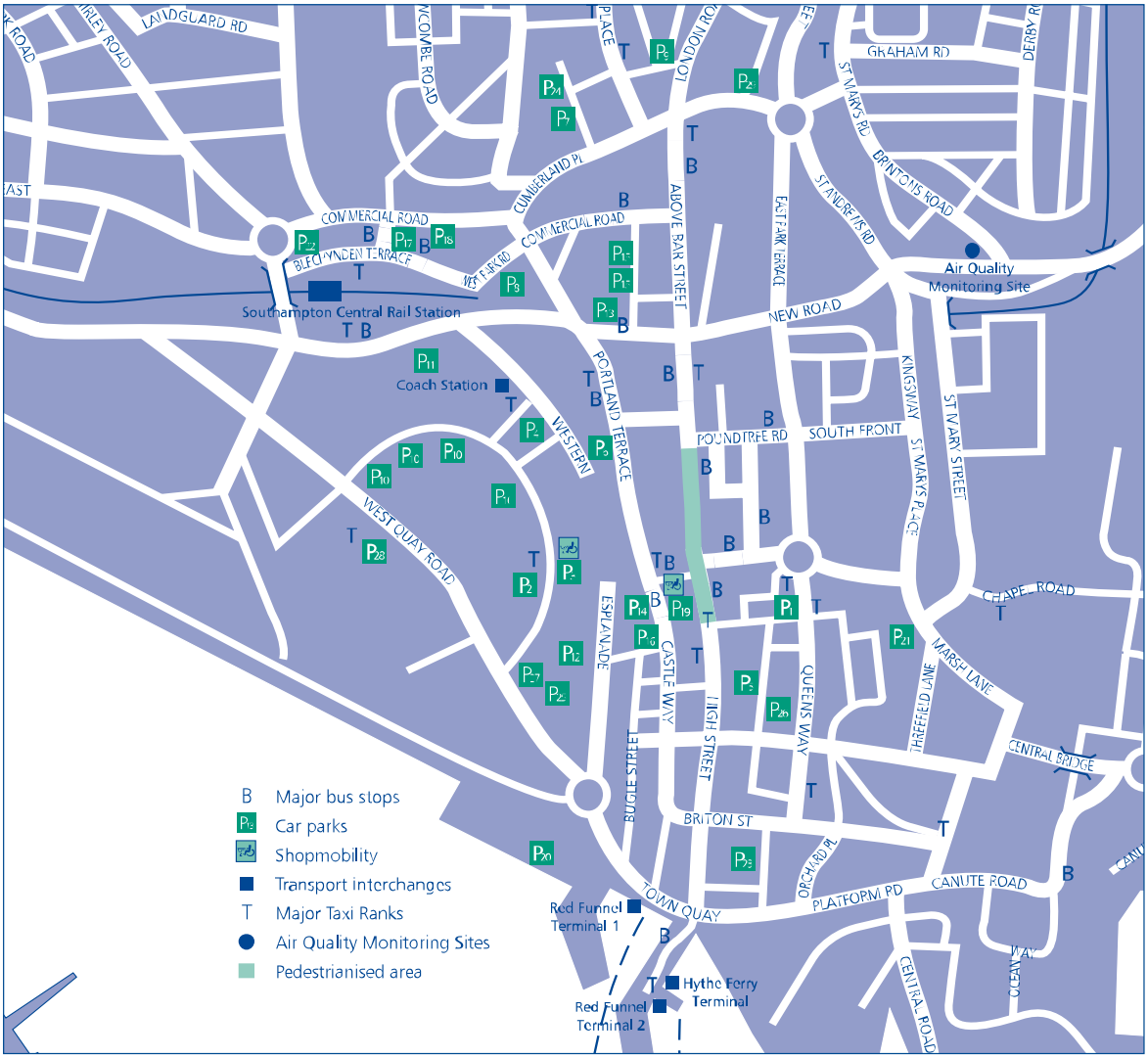
Source: SCC Parking Services/CCTV Unit

Over the past year there were no significant changes to the parking provision. However, significant maintenance and upgrading work has been and continues to be undertaken on city council owned multi-storey car parks in the city centre. The City Loop free bus service connects Grosvenor Square and Salisbury Street car parks to the Royal South Hants Hospital, Southampton Solent University and the city centre, running every 20 minutes between 0800 and 1820.

In addition to the car parks listed above, there are over 1500 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. 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.

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

Along with WestQuay car parks, the city council multi-storey car parks (Salisbury Street, Marlands, Eastgate Street, Grosvenor Square and West Park) have all 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 twelve months in the council's general purpose city council car parks.

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 six years. These figures are shown on the following graphs.

WestQuay Podium car park had no available data for 2003 and therefore the average figures only represent averages of data available.

Last year it was reported that there appeared to be significant differences in average spare capacity, with the average spare capacity for the five surveyed car parks where data was available suddenly showing an increase in available spaces as opposed to the continued fall in previous years since 2001.

This trend was examined and showed that the NCP Portland Terrace car park had seen a dramatic rise in spare capacity that year. On removing this data a drop in capacity was shown.

Once again, this year shows that there has been an increase in spare capacity in the selected car parks. This is more marked if the NCP Portland Terrace car park is included.

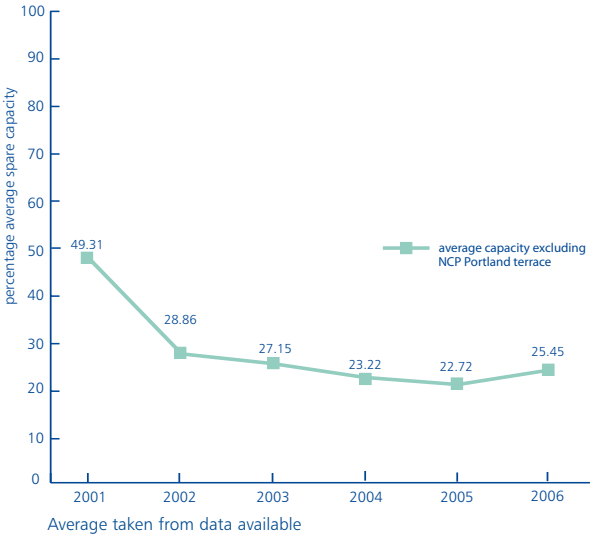
The NCP Portland Terrace car park has seen a dramatic change in usage since two years ago when there was little available capacity. Now there is between 25% and 50% spare capacity at most times of the week.

Marlands car park has also seen a slight increase in spare capacity over the past two years, with this being more marked at the weekends. Marlands is clearly a more shopper oriented car park but has lost some patronage and has extra spare capacity at weekends along with NCP Portland Terrace.

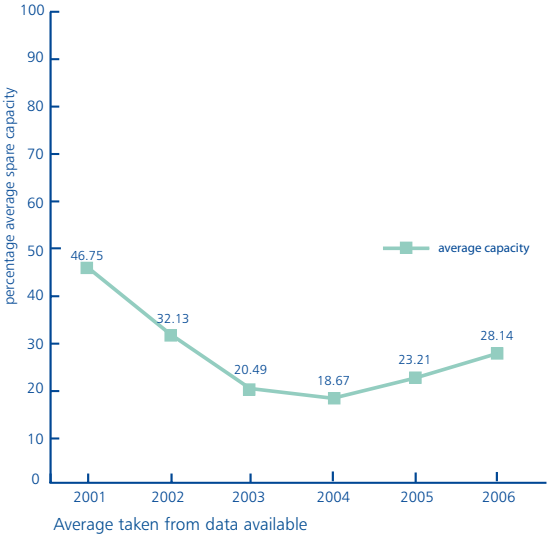
Eastgate Street is also a shoppers' car park but has seen little change in spare capacity over recent years. Similarly the WestQuay Podium car park is still very busy at all time periods. The WestQuay Multi Storey spare capacity has not significantly changed and is busier at weekends.

It seems that there is a trend starting to appear for some surveyed car parks (Marlands and Portland Terrace), to the northern end of the main retail core, having more spare capacity, and that this is now at a level where it is starting to have an impact on the general trend of the surveyed car parks. This also ties in with the pedestrian footfall map.

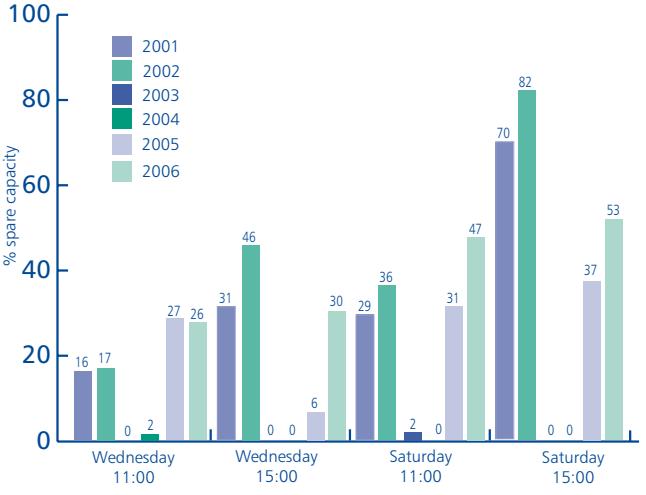
Average spare capacity excluding Portland Terrace



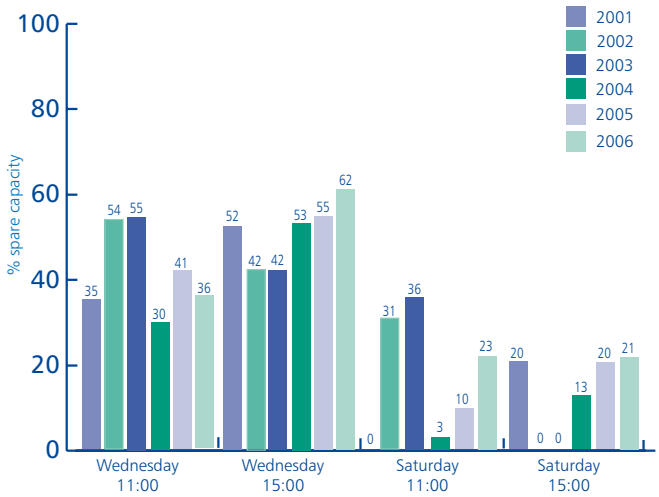
Average spare capacity for all 5 car parks



NCP Portland Terrace car park spare capacity (605 spaces)



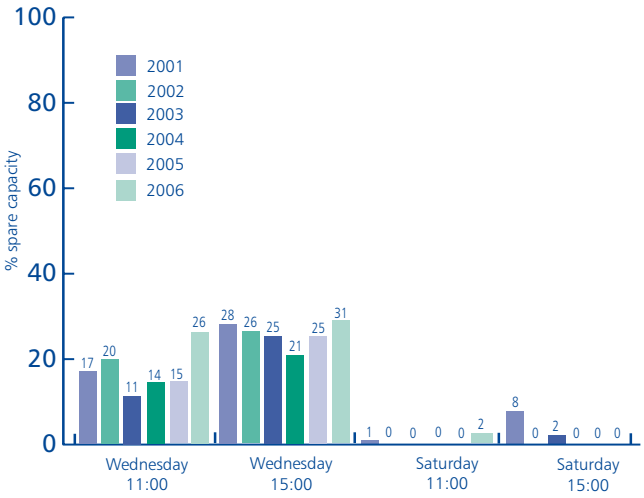
Marlands car park spare capacity (810 spaces)



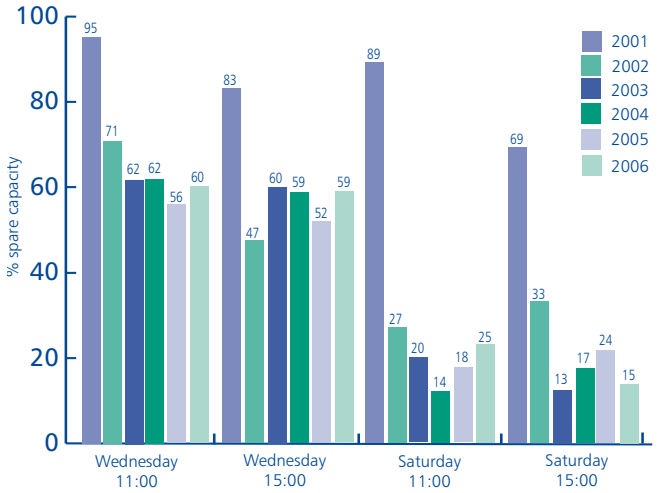
In the past it has been suggested that loss of spare capacity needed to be addressed to ensure that it does not stifle the city's development. It appears that this trend may be being reversed, although this could be a result of the choice of surveyed car parks.

A separate council survey in May/June 2006 confirmed that there were workers' and shoppers' car parks, and that while 65% of customers stay less than two hours, 17% stay over five hours. Overall satisfaction of getting to the car park was very high, with 73% satisfied with the number of spaces available, rising to 98% at Marlands, possibly due to the greater level of spare capacity shown. Workers' car parks, such as Kings Park Road and Gloucester Square however, saw 42% dissatisfied with the number of spaces available.

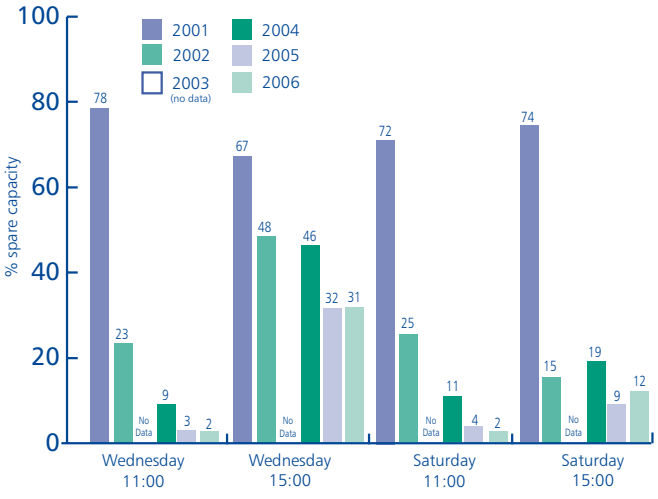
Eastgate Street car park spare capacity (713 spaces)



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



WestQuay Podium spare capacity (1,500 spaces)



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 WestQuay Podium and Multi-Storey, West Quay 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 Podium car park are designated for users of the WestQuay Shopmobility scheme.

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. The data presented here is for the city centre's main retail core**, rather than the complete health check area.

Land-uses

	Use	Units (2005 in brackets)	Sq metres 2006	% of total sq m 2006	Change in sq m 2006	% Change in sq m 2005-2006	% Change in share of sq m
A1*	Convenience	17 (18)	7,335	2	-4,651	-38.08	-1.12
	Durables	281 (289)	208,410	49	-1,463	-0.70	-0.35
	Services	64 (61)	13,233	3	446	3.49	0.11
A2	Financial services (counter services)	74 (72)	29,132	7	774	2.62	0.18
A3	Food & drink	99 (98)	36,904	9	-297	-0.80	-0.07
C1	Hotels and hostels	2 (2)	6,518	2	0	0.00	0.00
C3	Dwellings	136 (130)	11,098	3	572	5.43	0.14
D1	Non-residential institutions (inc education)	14 (13)	23,709	6	550	2.37	0.13
D2	Assembly and leisure (inc cinemas, theatres)	10 (10)	21,293	5	0	0.00	0.00
	Vacant offices	13 (14)	4,718	1	-244	-4.92	-0.06
	Vacant retail	75 (67)	52,270	13	5,685	12.20	1.37
	Vacant other	3 (5)	158	0	-1,342	-89.47	-0.32
	TOTAL	**788 (779)**	**414,778**	**100.0**	**0**	**0.00**	**0.00**

*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.

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, Vincent's Walk, West Bargate, West Marlands Road, WestQuay, 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 a modest increase (9) in the number of units it is divided into.

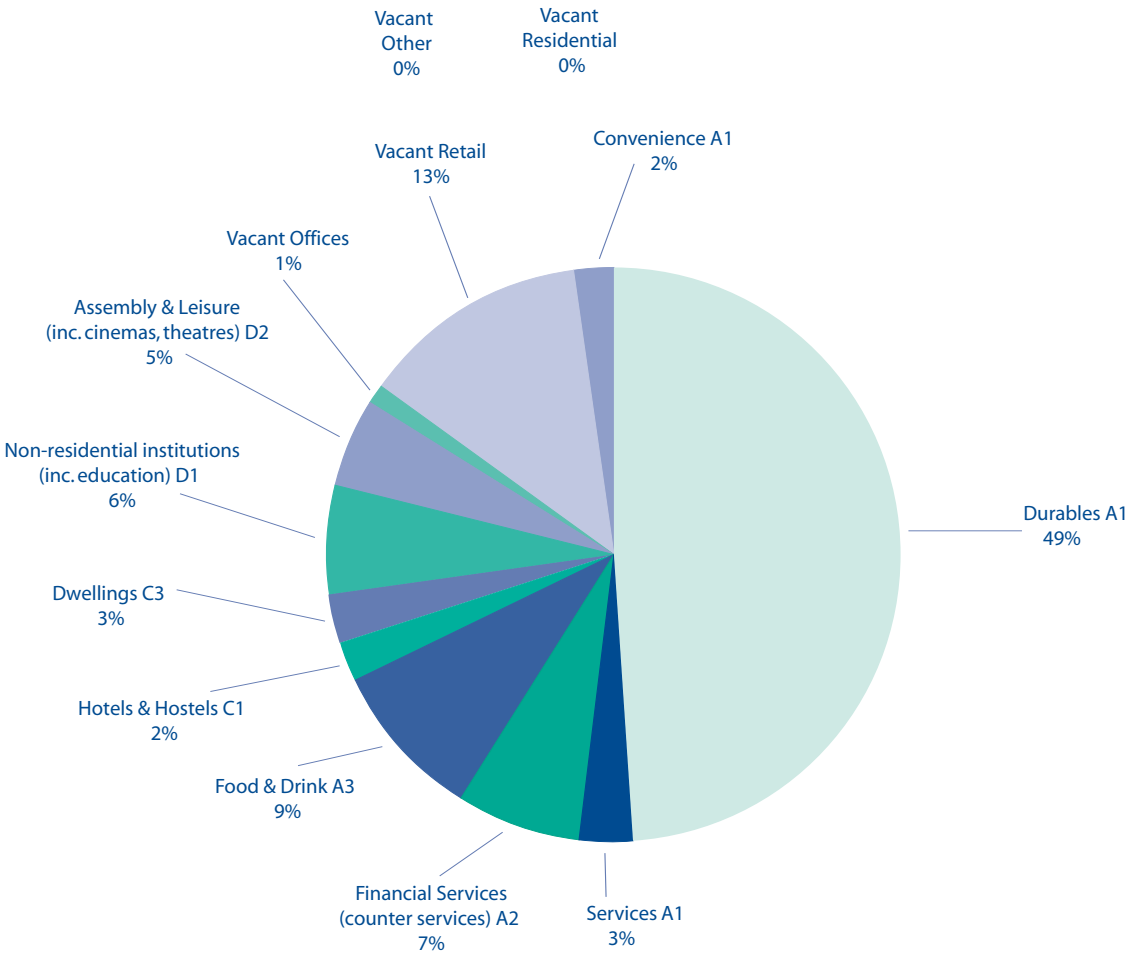
During this year there have been various shifts in floorspace and percentage change within categories. A1 convenience goods have seen a significant percentage drop in their floorspace, and a drop of almost 5,000 sqm mainly attributable to the vacant Waitrose store in WestQuay. Only two other uses experienced a percentage fall in floorspace, those being A1 durables and A3 food & drink, these changes were only small shifts in floorspaces. There was also a slight percentage fall in the quantity of vacant offices.

The other main area to be highlighted is the continued increase in vacant retail floorspace. With regard to vacant retail units, 8 additional units became vacant during the year, bringing the total to 75 vacant units. The high vacant retail floorspace is affected by the Tyrrell & Green remaining undeveloped and Littlewoods continues to be vacant.

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 (49%), with food & drink (9%) and financial services (7%) forming the other major components. Vacant retail has increased to 13% (a 1.37% increase in its share) whilst vacant other and vacant offices have fallen by 0.32% and 0.06% respectively.

Despite the apparent significance of vacant retail, 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 continuing healthy and lively picture.

Percentage share of total floor space



Source: Southampton City Centre Management

6 Retail performance

General performance

Experian produces a league table of over 1,100 retail centres in the United Kingdom and over a third of a million UK retail outlets. In 2003/4 150 were ranked, however in 2006/7 only 50 were ranked and data was not produced in 2004/5 and 2005/6. The rankings are 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.

Between 2001/2 and 2003/4 Southampton was ranked 7, having climbed from 45 in 1998/9 prior to the opening of WestQuay shopping centre and appearing to have found a stable level. However, in 2006/7 Southampton has fallen to 13.

Retail centre ranking - selected towns/cities

	2000/01	2001/02	2002/03	2003/04 *	2006/07
Nottingham	3	4	4	5	5
Southampton	38	7	7	7	13
Cardiff	8	6	6	8	11
Norwich	N/A	8	9	9	10
Reading	N/A	9	8	12	16
Edinburgh	12	12	14	16	7
Kingston upon Thames	15	13	12	17	12
Brighton	25	23	21	18	19
Guildford	20	16	17	21	35
Bristol	14	20	20	24	24
Basingstoke	140	140	31	34	N/A
Portsmouth	91	91	N/A	N/A	47
Winchester	145	145	N/A	N/A	N/A
Bournemouth	155	155	N/A	N/A	N/A

Source: Experian Ltd

*Data not available for 2004/05 or 2005/06

Whilst Southampton's position in the top ten shopping centres was not maintained this year, many other southern retail centres fell in rank compared to 2003/4 rankings, including Cardiff (8 to 11), Reading (12 to 16), Brighton (18 to 19), Guildford (21 to 35). Basingstoke has slipped from being ranked 34 (2003/4) having risen up from 140 with the opening of Festival Place to now being outside the rankings ie beyond 50. Although Portsmouth has moved up the table to 47 having been outside the previous rankings, it is still not competing with Southampton at this level. There is now only one retail centre in the southeast in the top ten, and it is not a town centre but a purpose built shopping centre - Bluewater (8).

The top five ranked retail centres include four northern cities: Glasgow (2), Birmingham (3), Manchester (4) and Nottingham (5). Leeds, Edinburgh and Newcastle appear in places 6, 7 and 9.

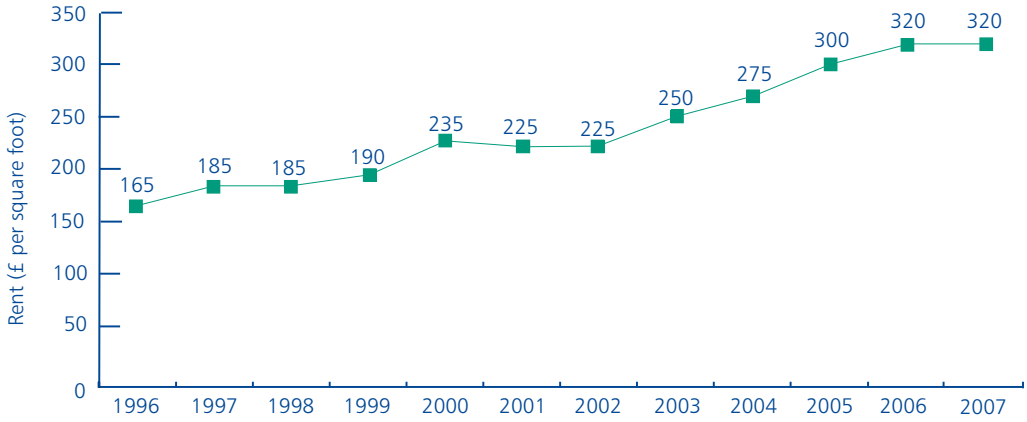
Therefore it appears that Southampton has only suffered marginally with a drop from being the leading retail centre south of London to being the third best performing centre beneath Bluewater and Kingston (12), but still the regional shopping capital. Whilst Portsmouth has risen slightly this has not threatened Southampton's position. Generally, southern cities appear to be falling in the rankings and the northern cities are higher up the rankings.

The Experian data predicts that in 2017, those centres in the top five this year will remain in this dominant position. Southampton is expected to fall four places to 17, whilst other retail centres in the south east are also expected to fall by 2017 including Bluewater (-3), Kingston (-2), Reading (-3), Brighton (-3) and Guildford (-7). Croydon is anticipated to move ahead of Southampton to 13. Generally the south eastern centres will continue to fall in ranking, and the northern centres will become further more dominant, with Liverpool expecting to be ranked 6 compared to 15 this year. Other centres such as Cardiff are predicted to move back into the top ten and Bristol to move from 24 this year to 18 in 2017. It is not clear however, what data has been included in the above projections, given the quantity of retail development likely to enter the planning pipeline in Southampton in the coming months such as Ikea and West Quay 3. Therefore, whilst these projections must be taken with caution, they do exemplify that the city must not rest on its laurels and expect to remain ranked 13 forever.

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 1996-2007

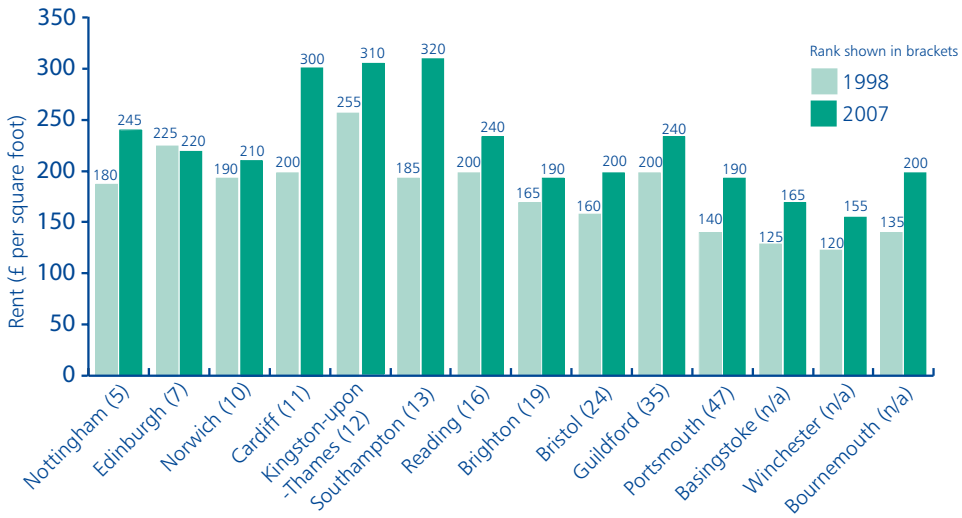


Source: Colliers CRE

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.

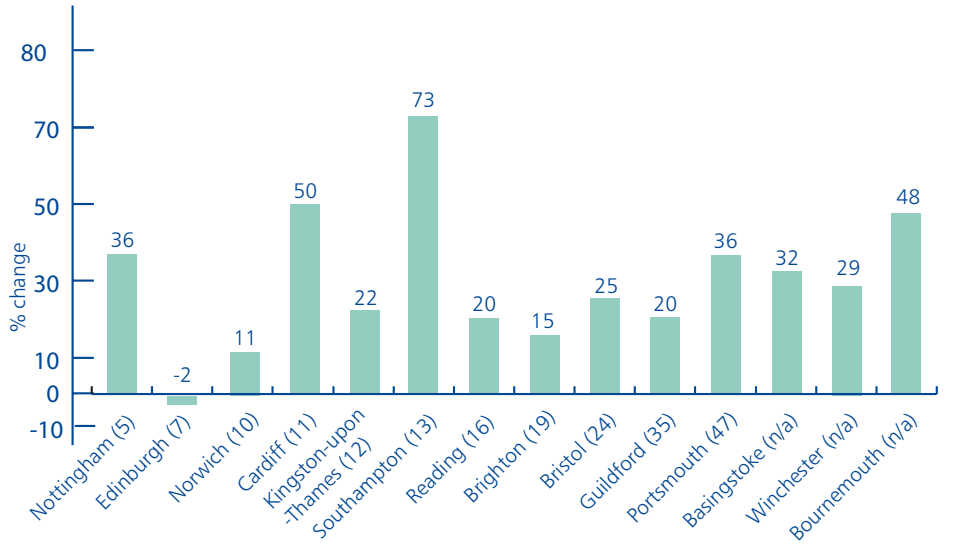
Rents rose dramatically in the second half of the 1990s, which coincided with the appointment in 1995 of the first City Centre Manager in Southampton. There was another steep increase in the late 1990s, when rents increased by 24%, which corresponded with the opening of WestQuay shopping centre. Since 2002 Southampton's zone A retail rents have risen consistently year on year. However, this year rents have remained at the same level as 2006 (£320 per square foot).

Zone A retail rents 1998 & 2007



Source: Colliers CRE

Change in Zone A retail rents since 1998



Rank shown in brackets

Source: Colliers CRE

Rental figures for selected centres have been monitored on an ongoing basis.
Since 1998 Southampton's rents compared to selected centres (shown above):

- have experienced the highest percentage increase in rents, although the rents in 1998 were lower than 6 of the centres monitored, including Kingston-upon-Thames, Reading and Guildford in the southeast demonstrating the impact from WestQuay; and
- are now the highest, with rents remaining at £320 per square foot level.

However, other retail centres in the south have seen a rise in Zone A rents this year, with Kingston-upon-Thames and Cardiff beginning to catch up with Southampton, whilst Southampton has remained constant. Southampton still leads the south east in terms of Zone A retail rents, but its static rents this year means that its lead has fallen compared to last year.

Investment

The main investment this year occurred in the Mall Marlands centre. Work commenced in autumn 2006 on a £2.5 million refurbishment project to improve the appearance and prominence of the centre. The works included the renovation of the Manchester Street entrance to the Mall, which was completed by Christmas 2006 as well as providing a new food and beverage area.

The WestQuay shopping centre lost Waitrose during the year which moved to Portswood district centre. This unit remained vacant for the rest of this year, although a new tenant lease has been negotiated. Zara, one of the worlds most successful fashion retailers moved into WestQuay in autumn 2006 into the 18,500 sq ft unit on the ground floor previously occupied by Habitat.

In February 2007, the first presentation was made to prospective buyers for the sale of a 50% stake in the Hammerson owned WestQuay shopping centre. Interest in this share of the shopping centre was strong in spring 2007 with Singapore investor GIC reported as the favourite to purchase the asset share from Hammerson.

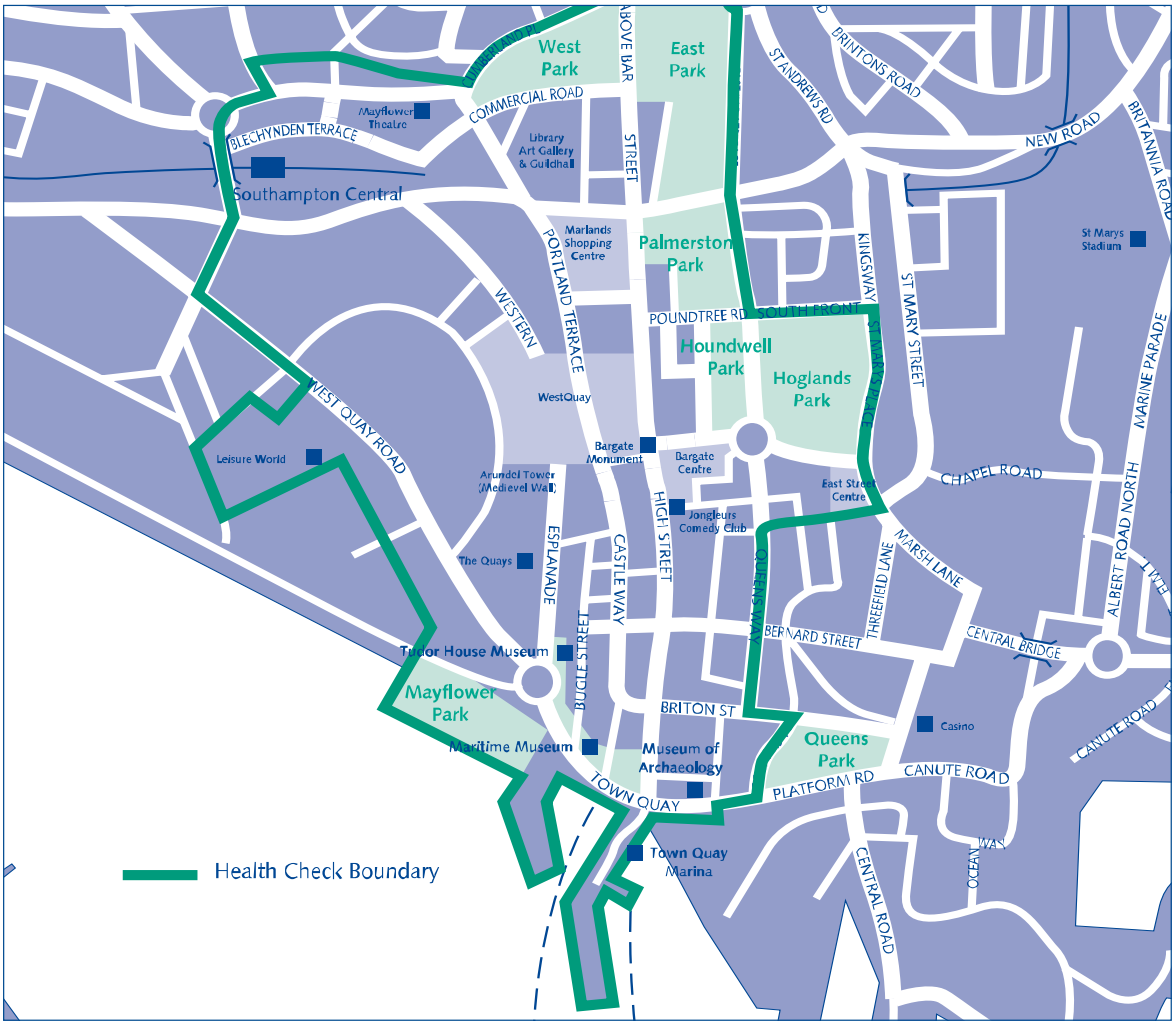
In 2006, Tesco Home Plus opened their second UK store at West Quay Retail Park, whilst the high quality book shop Borders, incorporating a Starbucks coffee shop, opened in early 2007 at the same location.

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 & Culture Map.



Source: Southampton City Council

With the opening of WestQuay, came the arrival of café culture to Southampton. Whilst boasting 100 retail units, WestQuay also 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 have been continuing 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 and this has seen significant changes over the year, especially around The Bargate monument. The redesign of London Road also commenced this year.

Leisure venues within the main retail core are:

- 84 Restaurants/ Coffee Bars/ Fast Food & Take-Aways
- 16 Public Houses
- 4 Night-clubs
- 4 Amusement Arcades
- 2 Hotels
- 2 Sports/Health Clubs

There have been no significant changes in these figures over the last five years, except in the number of restaurants/ coffee bars/ fast food and take-aways, which has increased by two over the past year.

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 2000/1, 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. Concerts and events are held throughout the year in the parks.

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. Over the May bank holiday, EAT (Emerging Artistic Talent) Southampton took place - a three day arts festival, where a range of visual arts and musical workshops took place as well as a variety of bands playing during the event with local artwork on sale. In the summer, Guildhall Square and surrounding streets hosted Southampton Live - a free street festival that included performances by local, regional and international performing artists. During the Christmas period Southampton City Council, with support from City Centre Management, introduced a real ice rink along with the annual German market that has become a feature of the festive season.

This year Southampton also launched an eight-week long digital arts festival, 'twonotten' at the 'bargate monument gallery'. This was the first digital arts festival in the South of England and showcased local, national and international artists who work with digital technology. The festival allowed contemporary artists to display how they use new technologies to create exciting visual arts and performance. Finally, the first 'Music in the City' event was held this year by The Bargate, arranged by the world hairdressing champion Trevor Mitchell.

In addition to this, there are various permanent **performance venues** within the city, the largest and most well-known of these being The Mayflower theatre. In 2006/7 The Mayflower saw a further increase in the number of performances being held despite a small drop in overall and average attendance. As well as performances, 4,700 people attended conferences and corporate events in 2006/7, an increase of 4% on the previous year. The biggest selling shows were A White Christmas, My Fair Lady, Chicago and Beauty and the Beast.

Attendance at The Mayflower 2002-2007

	2002/3	2003/4	2004/5	2005/6	2006/7
Attendance	465,662	344,919	445,037	433,831	396,720
No of Performances	376	254	329	337	374
Average Attendance	1,238	1,358	1,353	1,287	1,061

Source: The Mayflower

Culture

Cultural facilities within the Health Check area include the Central Library, the City 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 a historical setting for shoppers and visitors alike. During this year improvements to cultural provision in the city included The Bargate re-opening as a contemporary art gallery, monthly art markets and the refurbishment of the Jane Austen heritage trail.

In 2006/7 over 400,000 people visited the **Central Library**. In addition to this, staff answered over 84,000 enquiries ranging from information about books to business clinics and there were around 120,000 log ons using the free internet computers. According to the Public Library User Survey in October 2006, 95% of users thought the library service was good or very good. Now in its third year, Learn Direct enrolled nearly 1,000 learners onto courses during the year. The Central Library also includes a Business Library and works together with the European Information Centre, acting as the Southern Area's European Information Centre.

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 1930s municipal architecture.

Throughout the year, several temporary exhibitions have opened at the gallery and all have been well received by the public. This is reflected in the visitor figures which, despite a small (3.9%) drop, are over 25% higher than in 2002. The most popular exhibition so far in 2007 proved to be the spring temporary show 'Japan: A Floating World in Print' a travelling exhibition on loan from Maidstone Art Gallery and Museum.

Visitors to Southampton City Art Gallery

2002/3	2003/4	2004/5	2005/6	2006/7
45,969	49,385	56,402	60,283	57,956
	+7.4%	+14.2%	+6.9%	-3.9%

Source: Southampton City Art Gallery

The Education Service at Southampton City Art Gallery remains fully booked until the summer holidays. Outreach projects have grown in popularity with a majority of the gallery's freelance artists taking part in schools projects on-site. All holiday workshops and adult workshops and events have been well attended which has led to more events programmed for later in 2007.

Southampton City Art Gallery, although still affected by severe budget cuts, continues to produce a satisfaction score of 'more than satisfactory' (83%). The gallery ensures to build on its 3,500 works in the collection with a major interest in securing contemporary British works.

There are also several **museums** within the Health Check area. The following table shows attendance figures for these. Tudor House Museum closed in April 2002 for the protection of its assets and the health and safety of visitors prior to its long-term restoration, but was open for organised tours and could be visited by arrangement with the gardens occasionally opened for wedding photos. Over the last year there were 568 visitors in organised tours. The £2.3million restoration works of this 500 year old building commenced this year and should take an estimated three years to complete.

The Maritime Museum has seen a slight drop in attendance this year, whilst the Museum of Archaeology at God's House Tower has seen an increase in visitors. The increase in visitors to God's House Tower is indicative of the museum's education programme taking off, offering lead sessions and holiday activities for children. Overall visitor numbers are again increasing, but it is suggested that figures in 2005/6 may have been skewed due to the terrorist attacks in London, with large foreign language groups avoiding visits to the capital.

Visitors to major Southampton City Council museums

	2002/3	2003/4	2004/5	2005/6	2006/7
Maritime Museum	37,594	43,820	50,509	54,008	51,397
Tudor House Museum	2,663	N/A	N/A	N/A	N/A
Museum of Archaeology	9,910	10,108	8,940	10,779	12,535
Total	**50,167**	**53,928**	**59,449**	**64,787**	**63,932**

Source: SCC Historic Site Management

8 Community safety

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.

	2006	% of Total
Violence against the person	565	33.9
Burglary - dwelling	4	0.2
Burglary - non-dwelling	20	1.2
Theft of vehicle	3	0.2
Theft of pedal cycle	41	2.5
Theft from vehicle	61	3.6
Shop theft	298	17.9
Robbery	12	0.7
Theft from the person	103	6.2
Other theft	275	16.5
Fraud & deception	82	4.9
Sex offences	16	0.9
Criminal damage	188	11.3
All crimes	**1,668**	**100.0**

Source: Southampton Police / SCC Community Safety Team

Due to changes in the new crime recording database in April 2005, previous statistics are not comparable, and there has been a period of adjusting to the new scheme so that the ability to extract accurate and reliable data was compromised and last year's data has been disregarded.

In 2006, violence against the person was the most frequent crime reported, followed by shop theft and other theft. These top three account for over two thirds of all reported crime. Burglary dwelling, theft of a vehicle, robbery and sex offences have the lowest percentage share of all crimes, with none higher than one percent.

Safety and security initiatives

There are a number of initiatives occurring throughout the city centre to improve safety and security.

CCTV

The city council's CCTV control room provides state-of-the-art equipment and can control up to 600 cameras. It also has a dedicated tape review suite and an extensive data library. Police use of the review suite for information gathering increased by 8% to 1,050 visits in 2006/7, whilst tapes seized or copied to support police investigations and prosecutions increased by 8.8% to 1,257. At the end of March 2007 there were 251 closed-circuit television (CCTV) cameras, monitored 24 hours a day, in operation throughout the city, comprising of 51 in the central area, 158 in the council run multi-storey car parks and 42 ROMANSE cameras. Cameras in WestQuay shopping centre can also be accessed by the city council's control room, via a single monitor link supplied by WestQuay. Arrests and incidents related to CCTV operations are shown opposite. Whilst the figures cover all CCTV cameras within the city, two thirds of these incidents were committed in the central shopping area (around 66%), a small drop from last year's 71%. This year's total of 1,728 incidents is nearly identical to last year's figure (1,713). Following a significant increase in 2004, these percentage figures have been dropping year on year. Police detainment from CCTV recorded incidents increased by 5% to 73% of all reported incidents, with 1,263 arrests from the 1,728 incidents recorded.

The most frequent crimes where CCTV is involved within the city council's network remain public order/ assault (34.6%) and theft (15.8%) with the 6.6% increase in share for public order / assault being made up by the drop in theft's share. Traffic remains third highest (9.7%), whilst anti-social behaviour has dropped slightly to 6.3% but a larger drop in drunkenness to 4.5% has meant it falling into fifth place. This is the third year running that traffic incidents recorded on CCTV have risen in percentage share.

Incidents and arrests involving Southampton City Council CCTV since 2002

	2002	2003	2004	2005	2006
Theft	268	270	323	366	273
Drunkenness	89	59	90	111	77
Damage	71	67	79	60	62
Anti-Social Behaviour	158	92	134	110	108
Public Order / Assault	302	280	431	479	598
Suspicious Behaviour	101	48	90	109	78
Drugs	13	18	37	31	28
Traffic	116	69	134	152	167
Burglary (Commercial)	4	7	9	16	10
Vehicle Crime	21	8	14	18	28
Graffiti	5	3	3	4	4
Missing Person	51	8	14	13	18
Other	176	131	165	244	277
Total	**1,375**	**1,060**	**1,523**	**1,713**	**1,728**
% Change		-22.9%	+43.7%	+12.5%	+0.88%

Source: Southampton City Council CCTV

With regard to the number of incidents and arrests using CCTV, the numbers reflect several changes including the number of cameras in different locations, how incidents are classified, 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 five city council run multi-storey car parks in the city centre (Marlands, Eastgate Street, Grosvenor Square, West Park and Salisbury Street). 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 and this has continued over subsequent years, showing considerable success in the deterrent they provide, despite a slight rise in the thefts from motor vehicles in the last year.

Theft in Southampton City Council multi-storey car parks up to 2006/7

	1997/8	1998/9	1999/00	2000/1	2001/2 ---> 2006/7
Theft **of** Motor Vehicles	29	4	0	0	0 ---> 0
Theft **from** Motor Vehicles	177	20	17	3	2 ---> 4

Source: Hampshire Police Crime Prevention

All these city council multi-storey car parks 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. A car park survey in May/June 2006 found 88% of respondents satisfied with personal safety in certified council car parks whilst overall satisfaction for vehicle safety was 86%.

Southampton Business Against Crime (SoBAC)

SoBAC continues to unite the city's Business Community with the police, council and other organisations, in the fight against crime and antisocial behaviour thereby helping to make the city 'a place that people want to be in'. This year, thanks to a generous donation from the Police and the Crime and Disorder Reduction Partnership, the purchase of N-BIS (National Business Information System) was made possible. This is a state of the art system providing an enhanced database of offender profiles with the ability to share information with other Business Crime Reduction Partnerships nationwide.

Police Cycle Team

City police have a tactical cycle team who will respond to incidents on mountain bikes and go out on directed patrols in the city centre. Teams from Bitterne and Shirley also assist with football duties, parades, the Race for Life and other events in the city centre when necessary.

Southampton Community Safety Strategy
The Southampton Safe City Partnership has progressed a number of actions relating to reducing crime and disorder in the city centre. With regard to improving safety in the night time economy, it has:

- supported the development of the Best Bar None Awards Scheme, now extended city-wide
- worked with the emergency department at Southampton General Hospital to gain an understanding of the issues of any violence in the night time economy and those locations where people are most at risk
- worked with the Southampton Solent University to design a publicity campaign over the Christmas and New Year period about binge drinking and staying safe
- supported door staff registration and compliance checks
- carried out regular test purchases in on / off licenses
- introduced Police Community Support Officers city-wide, whose presence in the city provide reassurance and reduce the fear of crime
- supported the extension of the Designated Public Place Order to the whole city including the parks
- worked with transport providers to extend the night bus service out of the city and secured funding for the provision of bus marshals

City Patrol
City Patrol is a council funded service which is part of the Anti-Social Behaviour Team and works through enforcement, evidence gathering and reassurance to address issues of anti-social behaviour, enviro-crime and nuisance across Southampton. This uniformed service works from 8am to 11pm seven days a week and undertakes regular and reactive patrols across the city, including the city centre, in vans or on foot. The officers carry city council identification and are accredited by Hampshire Constabulary; they do not respond to calls that either involve a complaint of a crime or where the police would normally attend. City Patrol assisted with two operations prior to Christmas to help remove pedlars, increased patrols over Christmas and have been doing a lot of work with retail outlets educating on Trade Waste Agreements.

Southampton Licensing Link and Best Bar None
Introduced in October 2000 this partnership is comprised of public houses, nightclubs, the police and the 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 Licensing Link has 50 members. It meets on a regular basis in order that members can share and be updated with current information. Best Bar None is now in its second year and seeks to establish a standard of excellence within the trade, rewarding good and safe licensed venues. This year saw over 100 entrants for the awards, the highest number achieved in any city outside Manchester.

Student Safety Initiatives
The Safer Student Forum was set up including representatives from many agencies. The purpose of the group is to look into ways of ensuring students, especially international students, stay safe whilst studying within the city, as well as trying to reduce the number of incidents of students being the cause of problems. The group, led by Southampton Police, produced a DVD highlighting some of the dangers students could face during their time at university. This has been used with great success during talks at various opportunities throughout the past year. The DVD has proved so successful that nearly 400 organisations nationally have requested copies.

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 mount operations to monitor illegal peddling activities and prosecute where appropriate. At Christmas, two operations by City Centre Management, the police and various council departments, including the CCTV operation, saw 10 pedlars have their merchandise confiscated and summons' issued. The cases will be heard in August 2007.

Street Beggars / Rough Sleepers
Southampton's police in conjunction with City Centre Management, the city council's City Safety Team and the Drugs Referral Team have been involved in an ongoing initiative to remove beggars and rough sleepers from the city centre's main shopping streets. They are offered access to drug rehabilitation services and assistance with locating accommodation. This initiative is ongoing in the city centre with the intention of reducing the number of beggars and rough sleepers, helping to reassure the public and provide an increased sense of safety for all those using the city centre.

9 Environmental quality

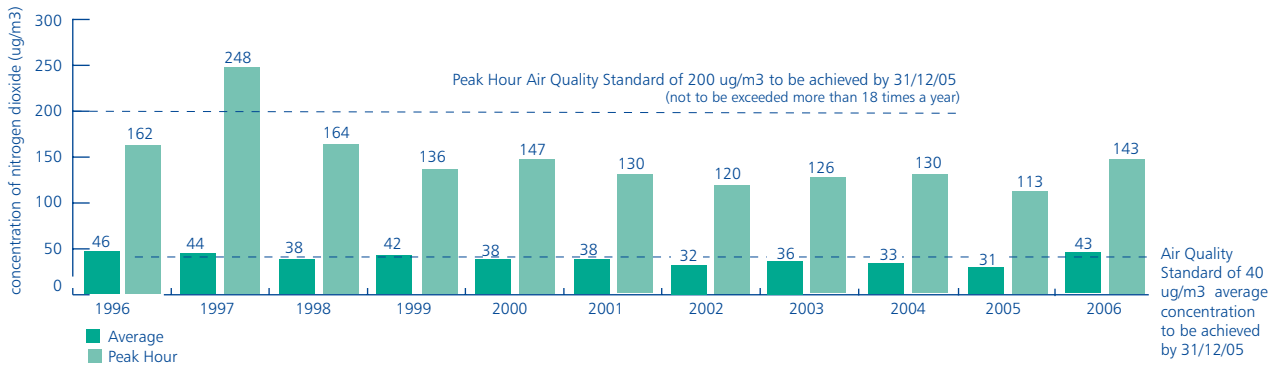
Environmental quality is an indicator of the level of attractiveness, comfort and enjoyment that has been achieved in the city centre.

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, 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)



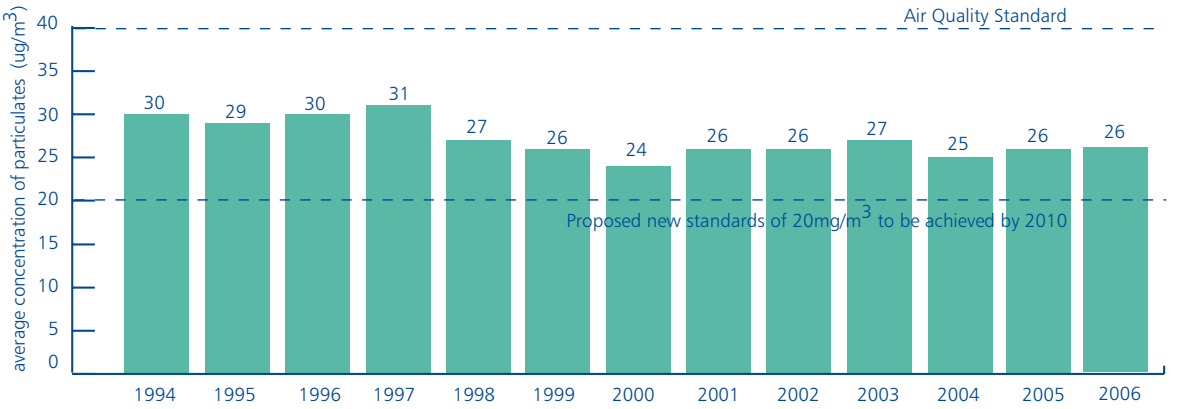
Source: Southampton City Council

Continuing with the trend of the average nitrogen dioxide concentration falling for the last five years, the level dropped to its lowest level yet - recording an average statistic of 28ug/m3 for 2006. This figure is within the quality standard of 40 ug/m3, which had to be achieved by the end of 2005. There has only been one exceedance of the 200ug/m3 peak hour air quality standard (in 1997) with the peak hour remaining well below the quality standard in subsequent years. However this year the level reached 143ug/m3; this is a higher recorded level than the past five years. The monitored data confirms that this location in the city centre, but outside the existing Air Quality Management Area, does not need to progress to a detailed assessment.

The average concentration of particulates remained at the same level as last year at 26ug/m3. The concentration of particulates has remained well below the air quality standard of 40ug/m3 over the period from 1994, staying below 30ug/m3 since 1997. However, whilst the figures seem to remain around this level, this is above the proposed new standard of 20ug/m3 to be achieved by 2010. The number of days per annum exceeding the 50ug/m3 daily mean increased to 7 days this year, whereas last year this level was only exceeded on 3 days. Whilst in the recent past this level has been exceeded on 14 days, the increase to 7 is important given the proposed new standard being 7 days per year by 2010.

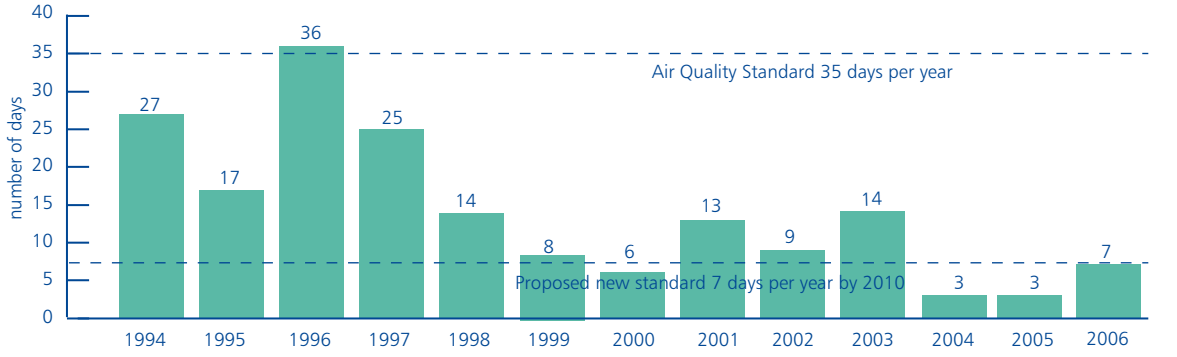
Meeting existing and new objectives is becoming all the more important in the city centre with the increase in city living over the past few years. In general, 2006 recorded higher levels of air pollution in Southampton than 2005 as is shown by some of these trends. Furthermore, a new station at Onslow Road, which is within an Air Quality Management Area, saw the first full year of recording data in 2006 and recorded a nitrogen dioxide level that exceeded the annual mean average standard of 40ug/m3 at a level of 54.3 ug/m3. This worsening air pollution situation was however experienced throughout the southern counties and was partly attributed to the hot, still conditions experienced during the summer.

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

Southampton City Council has shown a joined up approach with regard to its Air Quality Strategy and Policy. In 2004 Southampton adopted the Air Quality and Climate Change Strategy, which includes the council's programme to match the priorities under the UK Climate Change Programme. Air Quality Policy is also contained within the City of Southampton Local Plan Review (March 2006), where policies have been inserted to assist in meeting National Air Quality Strategy Standards.

In total six Air Quality Management Areas were declared by the council in 2005 for the road transport derived pollutant nitrogen dioxide (NO2); this has now increased to seven, including the Onslow Road station. The city council is currently 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. Assessment of air quality in 2006 by the council reveals that between 21% and 51% of the nitrogen dioxide in Air Quality Management Areas can be attributed to Heavy Goods Vehicles (HGVs). A concern is that the number of HGV movements to the container port are expected to double by 2010. A strategy for Air Quality Improvement will be included in the Action Plan, with the aim of reducing nitrogen dioxide through attending to transport emissions in particular, in order to reach the National Air Quality objective for nitrogen dioxide by 2011.

Southampton Geothermal / CHP District Energy Scheme

Southampton remains at the forefront in the production and use of sustainable energy. The Southampton Geothermal Heating Company (SGHC) has over the past 19 years operated the largest commercial District Heating and Chilling Scheme in the UK. SGHC is operated in partnership with Southampton City Council and Utilicom Group.

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 at West Quay Retail Park generate 6.5MW electricity which is exported locally to the National Grid. Heat recovered during the generation process is used to heat water which is then pumped around the city to consumers for heating and hot water. 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.

There are over 30 commercial consumers of heating and chilled water in the city centre, which creates a high level of demand. In 2006 another CHP scheme in the western part of the city was granted permission and it is hoped that there is the potential to reduce CO2 emissions by 170,000 tonnes by 2010. This follows a further CHP engine being installed at the city's Royal South Hants Hospital in 2005, which itself will reduce carbon emissions by some 630 tonnes per year.

In December 2006 Utilicom scooped the top prize in the Services Category of the National Energy Efficiency Awards for the Southampton District Energy Scheme, and the scheme continues to be regarded as best practice nationally for its innovative and successful approach to community heating.

Street cleansing

Cleaning of the city centre is continuously under review, to ensure that a high standard of cleansing is achieved and then maintained. New laws now permit councils to clamp down on environmental crimes after the Clean Neighbourhoods Act received Royal Assent. The new powers grant councils the power to immediately seize vehicles caught fly tipping, to issue fixed penalty notices for fly posting, waste and graffiti offences and allows them to retain the receipts. The Act follows Southampton City Council's 'Smarter, Safer, Cleaner' campaign which will see £41million being spent over the period 2005-2008 to improve the image of the city and to improve the quality of life for those working and living in the area.

Following on from the National Living Streets Conference held last year, the council has set up the Living Streets Charitable Trust to undertake a 'Community Street Audit' of Bedford Place, which although outside the Heath Check area, will impact on various future projects such as the City Centre Area Action Plan.

The Southampton City Council General Best Value Survey Results (March 2007) reveal that 71% of people surveyed are satisfied with the council's achievements of keeping land clear of litter and refuse, compared to 54% in 2003. A further 34% of respondents feel that the council has improved in this area over the last three years; only 12% felt it had got worse.

This year the council has employed the following additional street cleansing measures in the city centre:

- assisting with street cleaning associated with the markets in the city;
- washing down of the paved area around The Bargate every month;
- introduced a cleaning programme for all the stainless steel bins and better cleansing of thestreet furniture in the Old Town Area;
- lifting gratings to clean underneath every fortnight;
- the ' Start Every Day' initiative involving washing and checking through parts of the city centre;
- the 'Street Sparkle' project, a scheme to tackle cleaning streets that are always full of cars. Vehicle owners are required to avoid parking for a three hour period so deep cleaning of the streets can take place;
- use of the SCC Reactive Team between 07.00-09.00 Monday to Friday to remove flyposting and graffiti from any property or street furniture.

Environmental enhancement

A survey by The Guardian newspaper this year identified Southampton City Council in the top 10 of all local authorities on green issues and the steps they are taking to cut CO2 emissions. This survey was informed through contact with the Energy Saving Trust, the Local Government Association and the Improvement and Development Agency. This was mainly attributed to Southampton having one of the most extensive and longstanding heating and cooling systems. The city was also acknowledged for having a climate change strategy linked to air quality objectives and for employing the first full-time climate change officer.

Further work has taken place this year to improve the public realm in the city. In the later part of 2006, the first phase of the planned project for major improvement works to London Road commenced. One of the priorities is to create an uncluttered street that is of a high quality finish and is modern and safe.

A number of initiatives have been established to improve the Old Town area with the overall objective to make a positive impact on the whole of the city centre. This includes the closure of Bargate Street to cars to enhance pedestrian movement and the pedestrianisation and surface treatment of the Bargate area of the High Street down to East Street to create an event area. Other street enhancements include public art installations and a new paving scheme in front of Holy Rood Church to enhance the setting of this historic building, as well as feature lighting of The Bargate and re-opening of the Old Town Walls, Arundel Tower and the Castle Way footbridge. The old bus shelters in Castle Way were also replaced and the streetscene was decluttered where possible.

New seats were installed in the Above Bar pedestrian precinct, with repairs to the natural stone paving in Above Bar Street. The southern footway on Commercial Road adjacent to the Library and Art Gallery was repaved as were other roads and pavements in the city centre.

Other projects that evolved this year to enhance the environment in the city include the Southampton Legible City Project, which is nearing the end of its first phase. This initial stage includes the production of new free maps; other initiatives are planned for the rest of the year.

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Savills is pleased to be sponsoring
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Prepared by Savills Planning
on behalf of the City Centre Management Board