Bolton Town Centre Vitality and Viability Assessment 2010

Introduction

The 2010 assessment of the vitality and viability of Bolton town centre is a limited exercise using easily available sources of information rather than the carrying out of any original research or surveys. This is the fourteenth update since the report was first carried out in 1995. The report monitors Bolton town centres recent performance compared to other competing centres. The key variations since the last report are the key focus of the document.

The following indicators are examined in the remainder of the report:

- The amount of retail, leisure and office floorspace in edge of centre and out of centre locations
- Retailer demand
- Shopping rents: Pattern of movement in Zone A rents within primary shopping areas
- Town centre development schedule

The amount of retail, leisure and office floorspace in edge of centre and out of centre locations

Town centre uses are generally classed as office, retail and leisure. The amount of floorspace developed for these uses in the 12 months leading up to the 31st March 2010 is analysed below, including the percentage of development located in centres, at the edge of centres and out of centres. It should be noted that for this section of the study Little Lever, Horwich, Farnworth and Westhoughton town centres are considered in addition to Bolton town centre.

Table 1: B1 (Office) Floorspace

Total amount of B1 floor space developed within the local authority (m²)	3044
Total amount of floor space developed within town centres (m²). This is broken down as follows: • Little Lever town centre • Horwich town centre	172 (6%) 52 120
Total amount of B1 floor space developed at edge of centre locations	Nil
Total amount of B1 floor space developed at out of centre locations	2872 (94%)

In the 12 month period up to 31st March 2010 six per cent of B1 office floorspace completions in the borough were located in town centres as defined in the 2005 UDP. This consisted of an extension to existing office floorspace in Little Lever town centre and a change of use from residential to B1 offices in Horwich town centre. The most significant out of centre B1 office scheme was for 1920m² and is located to the North West of Westhoughton town centre. It is important to acknowledge that this scheme also incorporates workshop and warehouse uses. The other out of centre B1 office schemes involved either change of use or extensions to existing B1 office floorspace. The need to focus more B1 office development in town centres is addressed by the emerging Core Strategy.

Table 2: Retail Floorspace

Total amount of retail floor space developed within the local authority (m²)	8099
Total amount of retail floor space developed within town centres (m²)	Nil
Total amount of retail floor space developed at edge of centre locations. This is broken down as follows: • Westhoughton	4299 (53%) 4299
Total amount of retail floor space developed at out of centre locations	3800 (47%)

In the 12 month period up to 31st March 2010 no retail completions were located within town centres as defined by the 2005 UDP. Of the retail completions that took place almost half were located at out of centre locations with just over half at edge of centre locations. It should be noted that the edge of centre development consisted of a single supermarket scheme in Westhoughton, which was assessed against the sequential test. As no suitable town centre site was available, the edge of centre location was considered to be the most appropriate available site. The out of centre retail development consisted entirely of a garden centre. This is appropriate as such a use would not represent an effective use of town centre space. The need to focus more retail development in town centres is addressed through the emerging Core Strategy.

Table 3: Leisure Floorspace

Total amount of leisure floor space developed within the local authority (m²)	1295
Total amount of leisure floor space developed within town centres (m²)	Nil
Total amount of leisure floor space developed at edge of centre locations	Nil
Total amount of leisure floor space developed at out of centre locations	1295 (100%)

In the 12 month period up to 31st March 2010 all leisure completions were located at out of centre locations. It should be noted that the total leisure completions were made up of a single hotel scheme at Middlebrook. Although out of centre this is considered appropriate to support the aspirations for commercial development along the M61 corridor area. The need to focus more leisure completions in town centres is addressed through the emerging Core Strategy.

Table 4: Summary

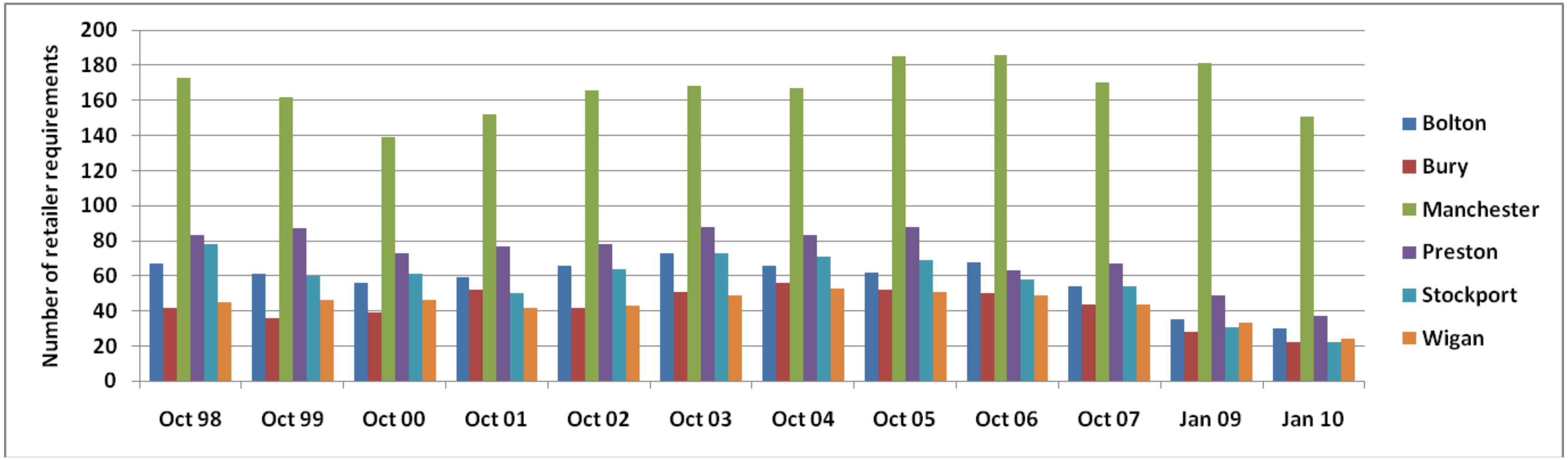
The above information is summarised below:

Total amount of office, retail and leisure floor space developed within the local authority (m^2)	12438
Total amount of office, retail and leisure floor space developed within town centres (m^2). This is broken down as follows: *Little Lever town centre *Horwich town centre	172 (1%) 52 120
Total amount of office, retail and leisure floor space developed at edge of centre locations. This is broken down as follows: *Westhoughton town centre	4299 (35%) 4299
Total amount of office, retail and leisure floor space developed at out of centre locations	7967 (64%)

Retailer demand

The current and past level of retailer demand in Bolton, and comparative areas, is illustrated in chart 1. Retailer demand fell in Bolton, and all the comparative areas, between Jan 2009 and Jan 2010. Retailer demand in Bolton was 35 in 2009 but had fallen to 30 by 2010. This continues a longer term trend: retailer demand in Bolton has been falling since 2006. However, this is also the general trend for the other comparative centres. Bolton's position in the hierarchy of retailer demand has remained relatively constant over recent years. For example, in 2007 Bolton was ranked 100th and in 2010 Bolton was ranked 103rd (1st being the centre with the most retailer demand). Despite minor fluctuations retailer demand in Bolton remains relatively strong. In 2010 the only comparative centres to have greater retailer demand than Bolton were Manchester and Preston.

Chart 1: Retailer requirements in Bolton and comparative centres



Focus (2010)

It is, however, important to provide a health check is respect of this information. Retailer requirements remain a useful indicator of the health of town centres but it is only ever expected that a very limited number of these retailers expressing interest will intimately take up space in Bolton. This occupation remains dependent upon key factors including:

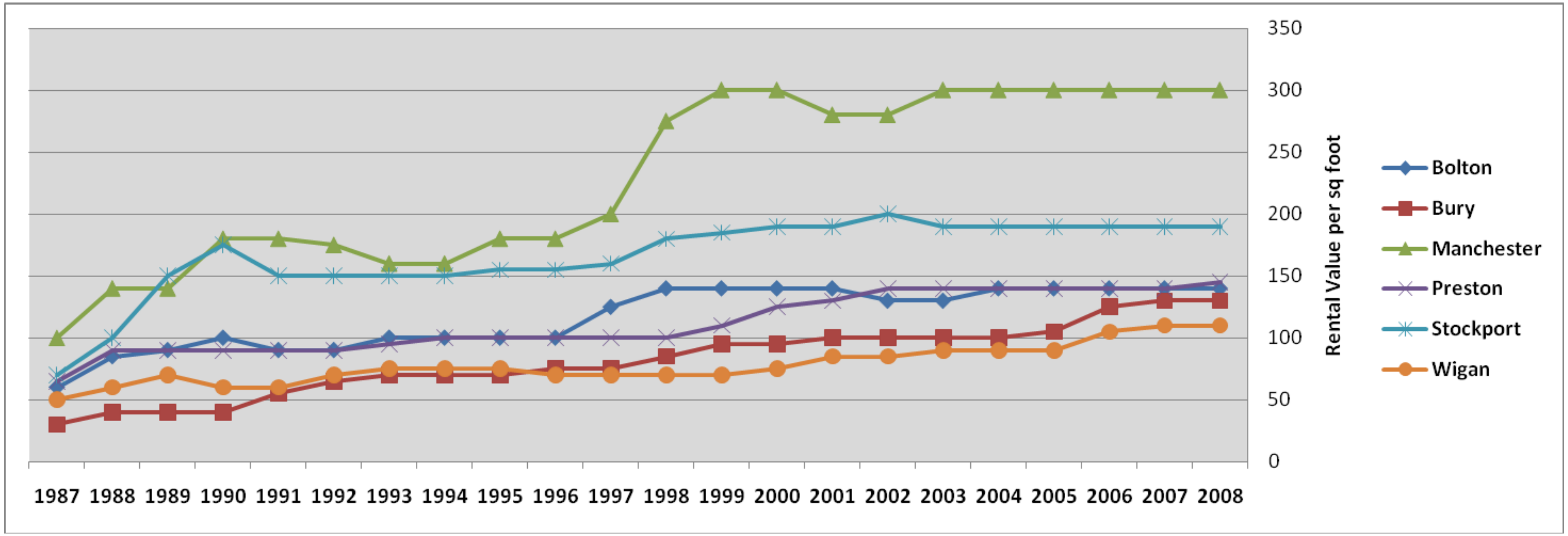
- The nature of accommodation available;
- Location; and
- Rental levels.

In addition if a retailer with a requirement in Bolton locates in an appropriate store they will then be removed from the requirements list meaning that in reality there will be one fewer retailer expressing interest in Bolton.

Shopping rents: Pattern of movement in Zone A rents within primary shopping areas

The current and past level of prime Zone A shopping rents in Bolton town centre, and comparative centres, are illustrated in chart 2. This is effectively the rental value for the first 6 metres depth of floorspace in retail units from the shop window.

Chart 2: Prime retail rental values in Bolton and comparative centres



Focus (2010)

Zone A rents in Bolton averaged £140 per sq.ft in 2008 (most recent data available through the Focus database), just below the Zone A rents in Preston. The Zone A rents being achieved are considerably below those being achieved in Manchester and Stockport but above those being achieved in Bury and Wigan. Over the last decade Zone A rent has increased significantly in Wigan town centre, Bury town centre and Preston city centre. It has, however, remained relatively constant in Manchester city centre, Stockport town centre and Bolton town centre.

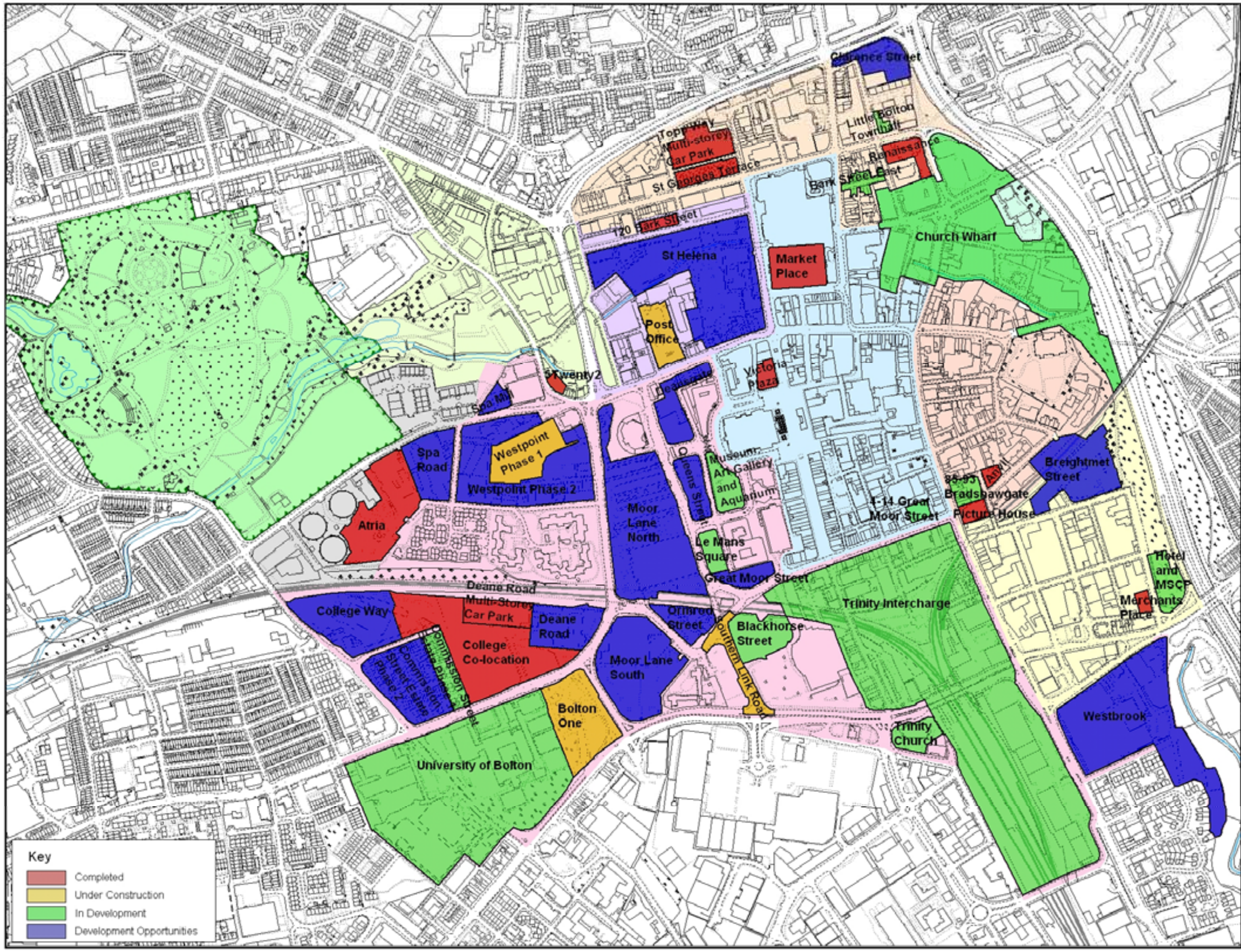
Town centre development schedule

There are a number of schemes that are either recently completed, under construction or in the pipeline that will enhance the vitality and viability of Bolton town centre. These are illustrated in the map below and summarised in the accompanying text:

Bolton Council

Development and Regeneration Department

Central Bolton Developments Hot Website



prepared by: Richard Humphreys
reference:
date: 11/06/2010

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Recently completed schemes

- Topp Way and Deane Road Multi Storey Car Parks are located at sites on the edge of Bolton town centre where the previous use was surface level car parking. This will assist with the aim of discouraging extraneous traffic from entering the central area and will also free up sites for other development.
- A new co-located educational campus in the town centre for Bolton College and Bolton Sixth Form College has opened increasing the town centres diversity of uses as well as pedestrian footfall.

Under construction schemes

- 40 apartments are currently under construction at Garside Street, these are expected to open in 2011 and will increase both the diversity of uses within the town centre and pedestrian footfall.

- Bolton One will provide a new health, leisure and research centre on the same town centre site as the University of Bolton. This facility will also provide a swimming pool and climbing wall. Construction of Bolton One has been making excellent progress and is due for completion in 2012.

Schemes in the pipeline

- Construction and conversion is expected to commence in 2011 on 33 apartments at the rear of the Deansgate Post Office. This will again increase both the diversity of uses within the town centre and pedestrian footfall.

- Tesco are expected to submit a planning application in spring 2011 on the Bark Street site. This will involve the development of approximately 115,000 sq. ft of retail floor space.

- Bolton Transport Interchange with commercial development at the front. This will involve a £48 million investment with a reserved matters planning application expected in February 2011 and opening expected in 2014.

Conclusion:

Although town centres are facing challenging circumstances Bolton Council are encouraged by a number of factors including retailer demand and prime Zone A rent remaining strong. The town centre development schedule also illustrates that there is a co-ordinated programme of regeneration initiatives that are either recently completed, currently under construction or in the pipeline, that will increase the vitality and viability of Bolton town centre.