



# Wyre Forest Retail and Leisure Study

Part A: Text

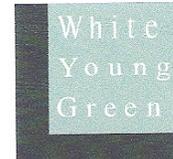
Wyre Forest District Council

Prepared by White Young Green

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# 1 INTRODUCTION

## Scope and Purpose

- 1.01 This report has been prepared by White Young Green Planning on behalf of Wyre Forest District Council (WFDC). The purpose of the report is to consider retail and commercial leisure issues in the district and its catchment area, specifically in order to guide the type, size, and broad location of future retail and leisure provision based on a full assessment of the current and future role and function of the area's principal town centres.
- 1.02 In response to the requirements of the consultant's brief, the report has been structured to meet the following objectives:
- To provide an assessment of existing and likely future retail and leisure patterns within the study area and in particular those relating to the town centres of Kidderminster, Stourport, and Bewdley. This should take into account market trends (both at national and local level), current Government guidance, and the results of primary research.
  - To provide an assessment of existing retail and commercial leisure provision, including analysis of the sub-regional shopping hierarchy, major proposed developments within the sub-region and the socio-economic character of the catchment area population.
  - To identify appropriate catchment areas for the main centres within the district.
  - To provide an assessment of the need for additional retail and commercial leisure floorspace over the period to 2021, having particular regard to the implications of potential targeted retail growth at Merry Hill/Brierley Hill.
  - To consider options for meeting the needs identified, and provide advice on the options for accommodating strategic growth.
  - To consider the implications of development at Weavers Wharf, Kidderminster, for the traditional town centre of Kidderminster, and the likely future effects on the function of that traditional town centre area.
  - To provide advice on the most appropriate measures and data sources for ongoing monitoring and reporting.

- To consider the strategic direction of growth (past and future) and possible implications for the quantitative and qualitative need for additional car parking in Kidderminster Town Centre.

1.03 The study addresses the following specific matters in order to achieve the above objectives:

- Current and likely future trends in the retail and commercial leisure markets at national and local level;
- An assessment of the quality of the retail offer in the district, to include a health check audit of the vitality and viability of the main towns;
- An assessment of current shopping and leisure patterns in the study area, based on the results of commissioned household and on-street surveys;
- Analysis of expenditure availability in the study area in respect of both convenience and comparison goods;
- An assessment of the turnover of existing retail provision within the study area;
- An assessment of expenditure capacity available to support additional retail floorspace over the study period;
- An assessment of the qualitative need for additional retail and leisure facilities in the study area; and
- An assessment of current car parking provision in Kidderminster Town Centre and the possible need for additional facilities.

1.04 In undertaking these areas of research, due regard has been given to relevant advice contained in PPS6. The study also takes into account retail information provided by WFDC.

1.05 The following areas of new empirical research have been undertaken as part of the report:

- A telephone survey of over 1,000 households in and around the study area, based on postcode sector geography, in order to ascertain the general pattern of shopping activities associated with the study area population.

- An on-street survey involving 300 interviews of visitors to Kidderminster (200 interviews) and Stourport (100 interviews) using a standard questionnaire, in order to ascertain information about the use of, and perceptions towards, the centre visited.
- A survey of town centre businesses within Kidderminster and Stourport, which sought information regarding the operation of the particular business, general attitudes relating to the structure and functioning of the town centres and views on measures needed to enhance town centre vitality and viability.
- Assessing retailer demand, using the Focus database, to estimate future demand for representation in the study area's town centres.

### **Structure of the Report**

1.06 The report is set out as follows:

- Section 2: Provides an executive summary of the study findings and recommendations.
- Section 3: Incorporates an overview of current and likely shopping and leisure trends at the national level which may have an influence on the need, and demand, for new facilities.
- Section 4: Provides a summary of prevailing national policy guidance for town centre uses, along with the current and emerging planning policy context for the study area at regional, sub-regional, and local levels. Potential changes arising from the Review of the RSS which may have an implication for retail provision outside the study area, particularly at Merry Hill, are addressed.
- Section 5: Provides an assessment of the levels of vitality and viability displayed by each of the designated town centres in the study area using appropriate PPS6 indicators and identifies the relative performance levels of those centres. Reference is made in this section to relevant findings of the three surveys carried out as part of the study. This section also includes an assessment of the area's retail offer outside defined town centres, including major out-of-centre facilities.
- Section 6: Describes the three surveys; contains a detailed appraisal of the outputs from the surveys and presents a detailed description of shopping and leisure patterns within

the district, along with an appraisal of how these patterns may change over the study period and beyond. The potential implications on shopping and leisure patterns arising from proposals in the RSS Review are considered.

- Section 7: Assesses the scope for additional convenience goods floorspace. In particular, it contains an assessment of the quantitative capacity for, and qualitative deficiencies in, convenience shopping facilities in the district.
- Section 8: Assesses the scope for additional comparison goods floorspace. Specifically, it contains an assessment of the quantitative capacity for, and qualitative deficiencies in, comparison shopping facilities in the district.
- Section 9: Assesses the scope for additional commercial leisure facilities, having particular regard to qualitative deficiencies in current provision.
- Section 10: Draws from the content of previous sections to provide preliminary recommendations relating to accommodating identified needs for new retail and commercial leisure facilities, along with how WFDC can effectively monitor retail and leisure provision in the future.
- Section 11: Assesses the current provision of car parking in Kidderminster Town Centre and makes recommendations relating to the need for additional parking, taking account of the strategic direction of growth.

- 1.07 Separately bound appendices accompany this report, including the results of the commissioned surveys and the statistical tables used for the quantitative capacity exercise.

## 2 EXECUTIVE SUMMARY

### Introduction

2.01 This document provides a summary of the study commissioned from White Young Green Planning by Wyre Forest District Council, which is intended to form part of the evidence base for the emerging Wyre Forest District LDF. In response to the requirements of the consultant's brief, the report addresses the following objectives:

- To provide an assessment of existing and likely future retail and leisure patterns within the study area and in particular those relating to the town centres of Kidderminster, Stourport, and Bewdley. This should take into account market trends (both at national and local level), current Government guidance, and the results of primary research.
- To provide an assessment of existing retail and commercial leisure provision, including analysis of the sub-regional shopping hierarchy, major proposed developments within the sub-region and the socio-economic character of the catchment area population.
- To identify appropriate catchment areas for the main centres within the district.
- To provide an assessment of the need for additional retail and commercial leisure floorspace over the period to 2021, having particular regard to the implications of potential targeted retail growth at Merry Hill / Brierley Hill.
- To consider options for meeting the needs identified, and provide advice on the options for accommodating strategic growth.
- To consider the implications of development at Weavers Wharf, Kidderminster, for the traditional town centre of Kidderminster, and the likely future effects on the function of that traditional town centre area.
- To provide advice on the most appropriate measures and data sources for ongoing monitoring and reporting.
- To consider the quantitative and qualitative need for additional car parking in Kidderminster Town Centre.

2.02 The following areas of empirical research have been undertaken as part of the report:

- A telephone survey of over 1,000 households in and around the study area, based on postcode sector geography, in order to ascertain the general pattern of shopping activities associated with the study area population.
- An on-street survey involving 300 interviews of visitors to Kidderminster (200 interviews) and Stourport (100 interviews) using a standard questionnaire, in order to ascertain information about the use of, and perceptions towards, the centre visited.
- A survey of town centre businesses within Kidderminster and Stourport, which sought information regarding the operation of the particular business, general attitudes relating to the structure and functioning of the town centres and views on measures needed to enhance town centre vitality and viability.
- Assessing retailer demand, using the Focus database, to estimate future demand for representation in the study area's town centres.

#### **Assessment of Current and Future Shopping and Leisure Patterns in the Study Area**

2.03 Current and potential future shopping/ leisure expenditure and activity patterns in the district are influenced by a combination of national trends and the range, choice, strength and level of accessibility of retail and leisure provision in the wider sub-region. Planning policy at all levels also has a strategic influence on the location and scale of retail and leisure provision and will therefore have an indirect effect on shopping and leisure patterns.

2.04 The study provides an overview of national trends in retail and leisure activity and spending patterns (Section 3) current national, strategic and local policies (Section 4) and shopping and leisure patterns within the study area (Section 6) with the latter being based on the results on the Household Shopping Survey. The results of the Household Shopping Survey are collated and analysed in the context of defined zones based on postal geography. A plan of the defined zones is included as an Appendix.

2.05 The key findings in terms of the current shopping patterns are as follows:

#### ***Convenience Goods***

There is a very high level of containment of main and top-up convenience shopping trips in the

Wyre Forest District (represented approximately by zones 1, 2 and 3). Ludlow has some influence on shopping patterns in zone 3 but no other destination outside the district has a strong influence on market share of expenditure within zones 1, 2 and 3. This result is consistent with the findings of the 2001 Household Survey carried out as part of the previous retail and leisure study.

- 2.06 Kidderminster's food shopping Primary Catchment Area (PCA) encompasses zones 1, 2 and 3. The town also draws trade from a wider area including zone 4 (Bridgnorth) and zone 5 (Stourbridge) and the rural area south west of Stourport, but this Secondary Catchment Area (SCA) has limited penetration in areas to the east and south east of the town ( zones 6 and 7).
- 2.07 Stourport's PCA overlaps with Kidderminster's, with zone 2 expenditure being split more or less evenly between the two towns. Little expenditure is drawn to Stourport from other zones, indicating that the town has a very focused food catchment area, extending little beyond the urban area and its immediate surroundings. Bewdley attracts very little main food shopping expenditure, but plays an important role in servicing local top-up shopping needs.

### ***Comparison Goods***

- 2.08 The shopping patterns for comparison goods demonstrates that the district's core shopping catchment area is essentially the same as Kidderminster's primary catchment area i.e. zones 1, 2 and 3 with some penetration into surrounding zones, mainly zones 4, 5 and 8. The extent of Kidderminster's influence on shopping patterns is curtailed to the south (zone 7) by the regional centre of Worcester. Similarly, Merry Hill limits the town's influence in the area beyond its rural hinterland (zones 4 and 5). To the east (zone 6) Bromsgrove competes with Kidderminster in all shopping sectors and the presence of the M5 corridor, creating good links with Worcester and a greater Birmingham urban area also limits Kidderminster's importance in this zone.
- 2.09 In respect of bulky good shopping, Kidderminster's out of centre retail warehousing facilities take the lion's share of expenditure attracted to both the town and district generally.

### ***Potential Influences on Future Shopping Patterns***

- 2.10 As part of the draft phase 1 revisions to the RSS relating to the Black Country, a key proposal is to elevate the status of Merry Hill / Brierley Hill to a strategic centre in the retail hierarchy and to accommodate substantial quantities of new retail floor space in that location, in the period to 2021. While it is proposed to limit the extent of new comparison retail floorspace at Merry Hill to 36,000 sq. m. gfa in the period to 2016 and to make that development contingent on meeting a number of conditions beforehand, the effect of which is likely to delay any major planning

provisions for retail use until after 2011, there is a likelihood (subject to the approval by the Secretary of State to the proposed RSS revisions) that such scale of new retail development will have some influence on shopping patterns within the Wyre Forest catchment in the post 2011 period. One potential effect could be to reverse the apparent achievement (between this and the previous Wyre Forest Retail and Leisure study) of a claw-back of locally generated comparison shopping expenditure from Merry Hill to Kidderminster town centre, largely as a result of the Weavers Wharf development.

- 2.11 The only other potential significant influence on shopping patterns within Wyre Forest in the foreseeable future is the major proposals for the expansion of Wolverhampton town centre, although currently Wolverhampton exerts very little influence on the shopping patterns of Wyre Forest District's residents.
- 2.12 In respect of leisure patterns within Wyre Forest District, the most popular identified leisure pursuits within the district are eating out, pubs and clubs and entertainment. There is a relatively low level of visitation to cinemas. For most of the leisure pursuits reviewed, destinations outside the district are more attractive to residents than those located within the district. Only pubs and clubs, restaurants and sports and fitness centres within the district succeed in attracting a significant proportion of local resident custom.
- 2.13 The potential designation of Brierley Hill / Merry Hill as a regional centre as proposed in the draft phase 1 revisions to the RSS will bring a threat of improved leisure facilities at that location in tandem with the proposed major retail floorspace provision. As such, this is likely to exacerbate the already high levels of expenditure leakage on leisure activities at Merry Hill by residents of Wyre Forest.

#### **Qualitative and Quantitative Assessment of Existing Retail and Commercial Leisure Provision in Wyre Forest District**

- 2.14 In Section 5 of the report we examine the position of the three main centres within Wyre Forest in the sub-regional shopping hierarchy, providing a detailed audit of the vitality and viability of each of the main centres, taking into account changes in retail provision since the previous retail and commercial leisure study.
- 2.15 The RSS for the West Midlands identifies Major Urban Areas (MUA's), Sub-Regional Foci and Other Large Settlements. In Wyre Forest district only Kidderminster is identified in the hierarchy, as an Other Large Settlement.
- 2.16 We compare the position of Kidderminster and Stourport to other main shopping centres in the

sub-region using the Management Horizons Retail Rankings Index. In that Index, Kidderminster is classed as a sub-regional centre which ranks above Redditch, Dudley, Bromsgrove and Droitwich, but is below Merry Hill, Worcester, Wolverhampton and Birmingham. This suggests that the shopping patterns in the study area are likely to continue to be influenced by the greater strength, diversity and attractiveness of the retail offer at higher order centres within the sub-region, particularly Worcester, Merry Hill and Birmingham. However, Kidderminster also offers a substantial level of out of centre retail floorspace, particularly within the Crossley Retail Park, which helps to ensure that a higher proportion of the expenditure generated by local residents on bulky comparison retail goods, is retained within the District.

2.17 In respect of vitality and viability, having regard to the indicators set out in PPS6, Kidderminster town centre appears to be relatively healthy although there are some identified areas of weakness. In summary:

- The traditional town centre shopping area has witnessed a growth in vacancies in recent years, partly as a result of the relocation of a number of retailers to the Weavers Wharf development. Many of the key vacant units are unlikely to be attractive to national multiple retailers seeking representation in Kidderminster.
- The business survey indicates that many traders have been experiencing a downturn in fortune recently, with the Weavers Wharf development having a perceived negative impact on traders in the older parts of the town centre.
- The Town Centre has poor representation from the top 20 retailers when compared to most competing centres. The business survey highlighted a desire to see a greater choice and range of shops in the town centre, with improvements to the environmental quality. However, given its size and status in the retail hierarchy, the range and choice of shops is generally considered to be satisfactory.
- Kidderminster has maintained its position in terms of commercial yields.
- The centre is accessible and displays relatively good levels of pedestrian footfall.
- The environmental quality of the older parts of the centre is fairly poor, especially when compared to the new Weavers Wharf development which provides floorspace that is better configured to modern retailer requirements.

2.18 Turning to Stourport-on-Severn our assessment concludes that the town scores reasonably well in relation to most of the vitality and viability indicators set out in PPS6, notwithstanding its relatively minor role in meeting retail and leisure needs in the wider shopping hierarchy. The centre's key strengths are:

- The high proportion of convenience retail units within the centre (although these have declined since 1999);
- A strong representation of service uses (reflecting the town's role as a tourist attraction within the sub-region);
- A very low (and falling since 1999) vacancy rates;
- Stable (and recently falling) commercial yields; and
- A reasonably attractive shopping environment (although somewhat marred in the summer months by high volumes of traffic).

The identified weaknesses include:

- The relatively poor range and choice of national multiple outlets;
- Car parking arrangements are considered (by centre users) to be poor;
- Limited demand for national multiple representation in the town.

2.19 Turning to Bewdley this is a small centre and there is, subsequently, a shortage of data available in respect of several of the vitality and viability indicators in PPS6. For those indicators which it has been possible to assess, it is concluded that the centre fairs reasonably well, on the whole, in the context of its limited role in the wider shopping hierarchy. The centre's key strengths are:

- A very attractive shopping environment, due to the historic nature of the town centre and its proximity to the River Severn;
- A relatively strong service sector provision.

The centre's identified weaknesses are:

- A reduction in the overall number of units within the centre between 2000 and 2006;
- A growing vacancy rate;
- The range and choice of both convenience and comparison retail outlets is perceived to be poor by centre users;
- Limited national multiple representation;
- The car parking arrangements are perceived to be poor.

### Quantitative and Qualitative Need for New Retail and Commercial Leisure Floorspace in the Period to 2021

2.20 Our assessment of quantitative capacity for new convenience retail floorspace in the Study area, broken down by settlement, over the period to 2021, can be summarised as follows:

**Fig 7.2: Convenience Floorspace Capacity 2006-2021 (at £5,000 per sqm)**

	2006	2011	2016	2021
<b>Kidderminster</b>	2,160	2,951	3,954	5,035
<b>Stourport</b>	1,376	1,511	1,682	1,866
<b>Bewdley</b>	0	30	69	110
<b>Villages/Rural Area</b>	0	24	55	88
<b>TOTAL</b>	3,535	4,516	5,759	7,098

**Fig 7.3: Convenience Floorspace Capacity 2006-2021 (at £14,000 per sqm)**

	2006	2011	2016	2021
<b>Kidderminster</b>	771	1,054	1,412	1,798
<b>Stourport</b>	491	540	601	666
<b>Bewdley</b>	0	11	25	39
<b>Villages/Rural Area</b>	0	9	20	31
<b>TOTAL</b>	1,263	1,613	2,057	2,535

2.21 The analysis shows that:

- **Kidderminster:** Recorded overtrading principally at the Sainsbury's (Crossley Park), leads to latent capacity for additional convenience goods floorspace. We estimate this to be in the order to 770-2,160 sqm net (depending on the assumed sales density of new floorspace). Over the next 5 years, floorspace capacity rises to up to 2,950 sqm net.

- **Stourport:** if allowance is made for the collective overtrading of Stourport's stores, there is latent expenditure capacity in the order of £6.9m, equivalent to an immediate need for 490-1,380sqm net floorspace. Thereafter, expenditure capacity is in the order of an additional £0.7m to 2011, and £1.5m to 2016, meaning that there is capacity for up to an additional 600-1,680sqm net floorspace over the next ten years.
- **Bewdley:** given the settlement's low market share, capacity resulting from expenditure growth is very small, at only £0.2m over the next five years, and £0.3m over the next ten years. At most, this equates to a need for an additional 70sqm net floorspace at 2016.

**Villages/Rural Area:** the household survey results suggest that a small proportion of expenditure gets directed to convenience stores outside the three main settlements in the district. On the basis that these stores retain their current market share, a small proportion of expenditure growth will be directed to such facilities, in the order of £0.1m to 2011, and £0.3m to 2016, equivalent to a need for an additional 50sqm net floorspace over the next ten years.

- 2.22 Turning to the **qualitative** need for new convenience retail floorspace, we conclude that Kidderminster is well served by modern foodstores and is also represented by a number of smaller foodstores orientated towards the discount market. None of the main food stores within Kidderminster show significant conditions of overtrading. Overall, there is no qualitative need for additional food retail floorspace within Kidderminster.
- 2.23 While there are a number of small supermarkets in Stourport, the Household Shopping Survey reveals significant levels of leakage in expenditure on convenience goods from Zone 2 which is Stourport's immediate shopping catchment area. This suggests that the overall quality of existing convenience retail floorspace in Stourport falls short of aspirations / expectations of Zone 2's residents. We therefore conclude that there is a qualitative need for improved foodstore provision in Stourport.
- 2.24 In Bewdley, while it may be desirable for that settlement to have a foodstore suitable for main food shopping purposes, we do not consider that there is an overriding need for such a facility given the settlement's limited role in the shopping hierarchy and reasonably good accessibility to Kidderminster's stores.
- 2.25 The assessed quantitative capacity for new comparison retail floorspace within the district, broken down by settlement, is summarized in the following tables:

**Floorspace Capacity in Kidderminster to 2021 (Constant Market Share)(sq. m. net)**

Floorspace Capacity	2011	2016	2021
Scenario 1	1,100	2,400	4,000
Scenario 2	4,900	11,400	20,300
Scenario 3	8,300	19,900	36,200

**Floorspace Capacity in Stourport to 2021 (Constant Market Share)(sq. m. net)**

Floorspace Capacity	2011	2016	2021
Scenario 1	50	100	150
Scenario 2	200	450	850
Scenario 3	350	850	1,500

**Floorspace Capacity in the District to 2021 (Constant Market Share)(sq. m. net)**

Floorspace Capacity	2011	2016	2021
Scenario 1	900	1900	2900
Scenario 2	3,800	8,900	15,600
Scenario 3	6,500	15,600	27,800

- 2.26 In each case, the scenarios involve a variation in the assumptions adopted regarding growth rates in comparison goods expenditure and the proportion of expenditure taken up by special forms of trading (e.g. internet shopping, mail order etc.). In each case we recommend that scenario 2 should be adopted for the purposes of planning future growth within each of the settlements.
- 2.27 Our conclusions in respect of the need for commercial leisure are that over the period to 2021, there is forecast capacity within the study area, but most likely for commercial viability reasons within Kidderminster, for additional leisure facilities, particularly in respect of a cinema, a tenpin bowling facility and at least one health and fitness club. Finally, it is difficult to accurately forecast future needs for pubs, restaurants and night clubs, it is anticipated that there will be some demand for such facilities focused in each of the districts three town centres.

**Recommendations on Broad Options for Accommodating Retail and Leisure Growth**

- 2.28 In light of the findings in the assessment concerning both vitality and viability and quantitative / qualitative need within Kidderminster, we conclude that a key aim for the retail strategy for that centre over the period assessed should be to plan positively for growth in comparison goods floorspace within the town centre area, ensuring that suitable opportunities are available for key national retailers. The presence of a quality department store is likely to have a major positive impact on the town centre and a recommended priority objective is to seek to attract that kind of retailer into the centre.

2.29 We suggest a couple of areas within Kidderminster town centre where there are opportunities for creating new retail floorspace suited to modern retailer requirements, these being:

- Site bounded by Worcester Street / Oxford Street / Green Street currently occupied by car parking and the existing Morrisons store. We note the desire by Morrisons to relocate their store and this would open up opportunities for a more comprehensive redevelopment options in that area;
- The Swan Shopping Centre – the redevelopment of the Swan Shopping Centre offers the opportunity to enhance visual amenity in this part of the town centre as well as the vitality and viability of the centre through the attraction of national multiple retailers, potentially in a mixed use scheme including an element of housing and/or other key town centre uses.

We also make recommendations regarding the delineation, within each of the three main centres, of a Primary Shopping Area, the requirement of which is now set out in PPS6. The PSA where the area of retail use is concentrated and can include primary and secondary retail frontage. Plans showing our suggested PSA boundaries for the three towns are contained at in the Appendices.

#### **Current and Future Car Parking Provision in Kidderminster Town Centre**

2.30 As part of the brief we have examined the extent to which car parking provision within Kidderminster Town Centre has changed as a result of the Weavers Wharf development and the extent to which current levels of car parking provision meet the requirements of visitors to the town centre. Information has been derived from a number of sources including our own surveys of the operation of town centre car parks.

2.31 The various surveys carried out as part of the retail study suggest some discontent with the overall quality of car parking provision within the town centre from a user prospective and our car parking survey demonstrates that certain car parks are more heavily used than others, notwithstanding matters relating to pricing or distance from the core shopping area.

2.32 We suggest that further research is carried out specifically relating to car parking use, which focuses on matters such as potential for changes in pricing regimes, user views relating to individual car parks, accessibility and signing of car parks.

2.33 Overall, however, taking into account our wide experience of auditing town centres throughout the UK, we do not see any overriding evidence that the level of car parking provision to serve the

town centre of Kidderminster is deficient to the extent that would justify the use of scarce town centre sites exclusively to build additional car parking spaces. However, more could be done with the existing provision to ensure a more even use and any additional retail floorspace within the centre should be required to provide car parking provision to ensure that the existing situation does not worsen.

### 3 CURRENT AND EMERGING RETAIL & LEISURE TRENDS

#### Introduction

- 3.01 The assessment of future retail and commercial leisure demand or 'need' should have regard to emerging trends within the industry, which may influence the conclusions of the report. Projected changes in shopping and leisure patterns could have fundamental implications for the way in which town centres are used, and how they will need to respond.
- 3.02 One of the effects arising from relatively low and stable levels of inflation over recent years in the UK and (officially recorded) unemployment has been a sustained growth in consumer retail expenditure. However, spending growth weakened in the second half of 2004 and through 2005, arising in the main from a slow down in the housing market, increases in interest rates, stagnation of consumer borrowing, and more recently increasing fuel and utility costs. On this basis, retail forecasters have been suggesting that in the short term at least, consumers are likely to spend less freely and be more careful about their spending. Colliers CRE<sup>1</sup> comment that consumer expenditure growth is the weakest since 1994.
- 3.03 In this climate, retailers face greater competition for spending. This has manifested in many high street retailers recording poor performance (notably over the Christmas 2004 period and throughout 2005), with household goods sectors especially experiencing flagging sales with the slowdown of the housing market. It may be that 'value' retailers, exemplified by Matalan and Asda, will be able to further build upon the growth and success they have experienced over the past decade as consumers are more watchful of their spending. It also makes those retailers not able to keep pace with modern customer expectations more vulnerable to poor performance and ultimate failure.
- 3.04 The current view amongst many economic forecasters is that growth in aggregate household retail spending is likely to continue to slow down in the future as spending levels are now close to a cyclical peak<sup>2</sup>. This is despite the financial position of most households remaining robust, mainly owing to wages rising ahead of inflation, higher employment levels and continuing growth in disposable income. Accordingly, the retail sector as a whole may continue to face challenges in short-term, but this may not be as marked as during late 2004/2005.

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<sup>1</sup> Midsummer Retail Report, July 2006

<sup>2</sup> Retail Planner Briefing Note 3.0, March 2006

### Emerging Retail Trends – Non-Food Shopping

- 3.05 MapInfo<sup>3</sup> forecast that while there has been sustained short term expenditure per capita growth, there will be a slow down in the annual growth in comparison goods expenditure, with the recent high rates likely to prove unsustainable. Over the period 2004-2016 MapInfo predict that the annual per capita growth rate for comparison goods will average 4.3%. By comparison, Experian forecast growth at 3.9% in the short term (2005-2009) and 3.6% over the medium term (2005-2014).
- 3.06 Changes in the economy are likely to affect different types of retailers in different ways. In the household sector, specialist furniture and carpet retailers have traditionally experienced reduced levels of sales as the housing market has stagnated, since such retailers tend to be highly susceptible to changes in consumer confidence. However, the consumer interest in larger retail formats selling a wide range of household furnishings under one roof at relatively modest prices, epitomised by IKEA, appears to be unabated. In this regard, it is noteworthy that PPS6 confirms that in satisfying the requirements of the sequential approach to site selection, a single retailer should not be expected to disaggregate component parts of a proposed store to separate sites. This recent relaxation in retail planning policy is likely to lead to increased opportunities for new large-format stores, although continuing difficulties in securing large-format out-of-centre stores is prompting IKEA to consider multi-level mixed-use schemes with much smaller floorplates and on sites around a quarter of the size of its normal requirements<sup>4</sup>.
- 3.07 The DIY sector has experienced significant growth in the last decade or so, aided to a considerable extent by the proliferation of home and garden DIY television programmes, and this sector is likely to prove more resilient in terms of consumer confidence in future years. However, with the recent downturn in the housing market, the major players in the sector have been experiencing deflated sales. Within the sector over recent years consolidation has taken place with a move towards fewer operators building larger format stores (typically over 9,000sqm gross floor area), the key beneficiary of this process being B&Q, particularly with their highly successful “Warehouse” format. Again, PPS6 may prove helpful to DIY retailers seeking such large-format stores.
- 3.08 In the electrical goods sector, a further boom in expenditure is being experienced as new technologies are driving the replacement of existing household entertainment systems, such as Plasma/LCD televisions, recordable DVDs, and wireless systems. Personal Computer demand is likely to experience steady growth through innovations in hardware and software and the recent

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<sup>3</sup> Information Brief 05/2, September 2005

<sup>4</sup> 'Ikea to Assemble Mixed-Use Sites', Property Week (17.06.05).

introduction of next generation mobile phones is stimulating a new surge in sales as networks are becoming fully operational. It is noteworthy that this sector represents one of the fastest growing components of special forms of trading (i.e. non-store sales) so that the continued high level of expenditure/capita growth on electrical goods will not necessarily manifest itself directly in to new floorspace demand.

- 3.09 In the clothing sector, various experts are predicting lower rates of expenditure growth generally. However, there has been a discernible growth trend in the discount clothes sector with a renewed consumer interest in value for money. Key beneficiaries of this trend have been discount retailers such as Matalan and Peacocks, as well as supermarket based franchises such as George (Asda).
- 3.10 The growing trend towards increased centralisation of services, whereby larger stores serving an extensive catchment area replace a number of smaller stores, as experienced in the DIY retail sector particularly, is likely to continue throughout all retail sectors. Additionally, in a climate of weakening consumer confidence, retailers are forced to re-evaluate their store portfolio, disposing of under-performing stores and concentrate on key locations in addition to opening new stores (eg. B&Q). This is in response to the desire to achieve increasing economies of scale and also to the increasing mobility of customers. Smaller shopping centres in particular (including small town centres such as Stourport) might be susceptible to this trend, with effects manifest through increasing vacancies caused by relocation or the closure of independent retail outlets. Additionally, larger centres may experience a reduction in national multiple retailers in instances where there is strong competition from regional centres. This could be an important consideration having regard to the relative strength of Kidderminster to nearby regional centres of Worcester, Birmingham, and Merry Hill.
- 3.11 New and innovative forms of retailing will continue to require new sites, and not all retailers' preferred formats are likely to be accommodated in existing shopping centres. In the context of Kidderminster Town Centre, the popularity and success of Weavers Wharf demonstrates the importance of being able to provide retail floorspace that meets modern retailer expectations, especially in order to maintain and attract key retailers.
- 3.12 There is also likely to be an increasing pressure to release existing retail parks from "bulky goods" restrictions to accommodate specialist retailers selling traditional high street goods, particularly sports, toys and clothing goods. Recent case law suggests that applications to vary or extinguish conditions restricting the type of goods sold from a retail unit outside town centres can be considered in the same way as proposals for new floorspace, in that they are subject to the tests of need, the sequential approach to site location and impact.

### Emerging Retail Trends - Food Shopping

- 3.13 Recent research by Verdict<sup>5</sup> indicates that there continues to be steady year on year growth of expenditure in the grocery market (with that term defined by Verdict to include non-food items such as news agency, sales, health and beauty products and music and video sales, in order to reflect the wider retail offer commonly provided in modern supermarkets). Growth in 2004 was at 4.0%, and fell to 3.4% in 2005, mainly as a result of a stagnant housing market and increased fuel and utility costs. However, Verdict identify that the grocery market has been more insulated to the general retail slowdown than other retail sectors due to its needs-driven aspect.
- 3.14 Information Brief 05/2 identifies an average annual per capita growth rate in convenience goods based retail expenditure of 0.8% between 1993 and 2004. MapInfo/OEF forecast that convenience goods spending per capita can be expected to rise at the recent, relatively strong rates. A growth rate of 0.9% per annum is forecasted for the period 2004 to 2016. By comparison, Experian forecast growth at 0.6% per annum in the short term (2003-2008) and 0.9% over the medium term (2003-2013).
- 3.15 The relatively slow growth in expenditure on convenience goods within the grocery sector during the 1990's has led the main grocery multiples to diversify their product offer to include a wider range of non-food goods, which have relatively high margins, in order to maintain and improve performance and market share in a highly competitive environment. In order to allow for the growth in non-food sales from foodstores, the main grocers have, and continue to, seek larger format stores. Verdict research concludes that superstores (defined as stores of 25,000sqft or greater) have been the main engine of growth in the grocery market, taking 42.2% market share in 2004. The trend towards one-stop shopping and value retail has favoured grocers with larger store formats.
- 3.16 In respect of changes in the number and type of stores operated by convenience retailers in the UK market, Verdict research concludes that there has been a considerable decline in overall store numbers during the 1990s with the impact felt more significantly on food specialists which have seen a significant decline in their numbers. However, the rate of store closures has slowed in recent years, with smaller stores becoming more competitive and resilient, and benefiting from increased tendencies for top-up shopping and the rising importance of fresh food. The likes of Sainsbury's and Tesco's smaller format stores are seen as driving the reversal of fortune in this part of the sector through promoting better shopping environments, more fresh produce, speciality counters, and increased opening hours.

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<sup>5</sup> Grocery Retailers 2006

- 3.17 A combination of factors, including the relatively sluggish growth in convenience goods expenditure and a strict planning regime restricting the opportunities to build further large superstores, has resulted in a high level of volatility in the grocery sector, with the biggest players in the domestic market (Tesco, Asda, Sainsbury, Morrisons, and Somerfield), being involved in intense competition to retain or grow market share.
- 3.18 Restricted opportunities for market share increases through organic growth has led to pressures for mergers and acquisitions within the sector, as witnessed in the mid 1990's through the takeover of Kwik Save by Somerfield, and most recently by the takeover of Safeway by Morrisons.
- 3.19 Additionally, grocery retailers continually have to look at new and innovative ways of diversifying in terms of both format and non-food offer. Tesco is undeniably at the forefront in terms of diversification, having expanded into sectors such as financial services and mobile phones.
- 3.20 The recent decision of the OFT to investigate the supply of groceries in the UK, specifically how the main grocers prevent or restrict competition in this sector, is evidence of the extent to which key grocers now dominate the UK market. This has become particularly evident in recent years as the main grocers have expanded their portfolio of small format convenience stores. The real or perceived domination of the main grocers is also evidenced by the growing public concern and dissatisfaction with the market leaders.
- 3.21 With the tests of 'need' and the sequential approach firmly established in retail planning policy, new sites for food retailing are becoming increasingly scarce. In order to retain and enhance existing market shares, during the course of the study period, national multiples are likely to continue to adopt the following practices:
- Extending existing premises. There will be pressure for large out-of-centre stores to upgrade, including an increased element of non-food goods and associated services in order to create a one-stop shop destination; and
  - Expanding into niche markets such as the local convenience store sector. Most national multiples now have a format which is associated either with the 'high street' or petrol filling stations, which are becoming increasingly common and successful. Additionally, the takeover of smaller grocery chains operating small-format 'neighbourhood' stores, as exemplified by Tesco's acquisition of T&S. The move of the major operators into this market sector is likely to (further) reduce the number of independent retailers, over the period of the study.

3.22 There has been a considerable expansion by the “deep discount” food retail sector in the UK over the last decade or so, and it is likely that there will remain pressure for further such development over the study period, since the preferred mode of expansion by these operators (in order to ensure maximum operational efficiency) is to provide a number of identical sized stores serving relatively small catchment populations (relative to the major supermarket operators), rather than large format stores serving a wide area and seeking to meet all consumer needs under the one roof.

### **Growth in Electronic Commerce**

3.23 Transactions over the internet have increased significantly over the past five years, mainly through the continuing growth of home PCs. Around a quarter of households now have broadband access<sup>6</sup>. The use of PCs as the principal means of conducting e-commerce may be superseded by DTV and games consoles, Personal Digital Assistants (PDAs) and mobile telephones, all of which are widening the socio-economic groups with potential to shop electronically. However, the non-availability to some social groups of credit and electronic cash will remain a barrier to the complete take-up of electronic shopping. Colliers CRE indicate that in 2005, the value of goods and services sold on the internet rose by 32% to £19.2m. This represents around 9% of total consumer spending.

3.24 Recent research by MapInfo<sup>7</sup> identifies the following proportion of expenditure by special forms of trading (ie. non-store transactions such as internet shopping, mail order, vending machines and markets):

- All goods: 3.8%
- Convenience Goods: 1.6%
- Comparison Goods: 5.3%

3.25 For comparison goods, the impact of e-commerce is affecting some retail sectors more than others. For example, music and books are now commonly purchased over the internet, through popular companies such as Amazon, whereas clothing and footwear sectors have not experienced such significant trade diversions.

3.26 It is likely that the increasing use of e-commerce will have repercussions for the high street. Over the study period, this may include:

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<sup>6</sup> Mintel, Internet Quarterly, March 2005

- the town centre becoming increasingly leisure based as retailers use e-commerce exclusively, as a means of reducing costs. Goods are distributed from depots. Demand for town centre premises may therefore decline sharply; or
- goods are ordered electronically but collected from high street shops. Shops therefore act as distribution and service spaces, and proportionately less space is dedicated to display; or
- e-commerce creates demand for specialist internet shopping 'malls' organised around geographical areas or niche consumers; or
- the high street becomes used increasingly by less affluent social groups and its retail composition alters to reflect this patronage; or
- e-commerce does not impact on the high street, but is used to browse for goods prior to purchasing in the town centre. Internet shopping retains a complementary role dealing in specialist or novel transactions and services; or
- high street shops find new opportunities arising from e-commerce. Local shops offer enhanced services, delivering increased levels of customisation and new functions such as community services and play areas added to existing outlets.

3.27 Colliers CRE comment that far from being a threat to the 'high street', e-tailing is increasingly being viewed as complementary by traditional retailers, who are able to exploit the strength of their brand and offer incentives such as 'pick-up-in-store' to internet buyers who do not want to pay for delivery or avoid having to stay at home to take delivery. It is only those retailers with weak brands or poor consumer service that are expected to struggle as a result of increased e-retailing. Additionally, a recent phenomenon is that some retailers who initially started out as pure online operators are now seeking high street representation. For example, in April 2006 the first of a new chain of 'drop-off' stores (Sell it Shack) opened in Manchester, aimed at customers without the technical expertise or inclination to sell goods on sites such as eBay.

### **Emerging Leisure Trends**

3.28 Statistics published by Mintel illustrate that spending on out-of-home leisure pursuits in the UK grew by 10% over the period 1998 to 2003<sup>8</sup>. This growth in leisure spending reflects

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<sup>7</sup> 2003 Consumer Retail Expenditure Estimates at Output Area Level, 2005

<sup>8</sup> The Leisure Business, 2003

proportionate increases in personal disposable income together with other factors such as a growing interest in 'keeping fit' and cinema-going and also greater access to gambling institutions following deregulation.

- 3.29 Spending growth is set to continue, although the anticipated rate of growth is an issue of debate. Key Note, one of the more cautious commentators, suggest that out-of-home leisure spending will increased by a further £5bn between 2005 and 2008, and now accounts for 28% of all household expenditure compared with 27% in 1995<sup>9</sup>.

### ***Cinemas and Theatres***

- 3.30 During the 1990s, the domestic cinema industry underwent considerable expansion. As part of the trend towards larger multi-activity leisure locations, a large number of multiplex cinemas were built to meet increasing demand. The high growth in cinema attendance during this period is attributed to the mixed-activity offer of modern cinemas and a long run of 'blockbuster' movies. Key Note estimates that box office revenue in the UK cinema market increased by 33% between 1999 and 2003. This increase coincided with a 20% increase in the number of cinema admissions, confirming that Cinema-going is increasingly one of the UK's most popular leisure pursuits. Key Note now forecasts that the market over the period 2004-2008 will experience a further 18% increase in admissions. However, Colliers CRE identify that the opening of new multiplex screens has fallen to a decade low and is likely to plateau for the next five years, mainly due to saturation in the market. For this reason, operator interest is being focused on smaller outlets (around 5 screens) in smaller market towns, or in shopping centre developments and refurbishment schemes, rather than multiplex-anchored leisure parks.
- 3.31 The theatre market has experienced a period of stagnation in recent years, although admissions rose by 4% between 1999 and 2001. There is some optimism in the industry that attendances will improve following increased Government funding from Lotto receipts and the reorganisation of the Arts Council into Regional Arts Boards.

### ***Ten Pin Bowling***

- 3.32 National statistics indicate 12-15% of the population played ten-pin bowling regularly in the 1990s. This represents a rapid growth from figures of around 2% in the 1980s. Mintel (2004) forecasts that expenditure on ten pin bowling will increase by 8% between 2004 and 2009. This forecast prosperity is due to the wave of facelifts currently being applied to bowling alleys that were constructed during the boom time of the early 1990s.

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<sup>9</sup> Leisure & Recreation Market, 2004

3.33 Commentators agree that ten-pin bowling has undergone a shift in patronage in recent years, with attendees now more likely to be part of groups visiting the location for mixed leisure activities rather than solely for ten-pin bowling. This is borne out by figures that suggest the 'dwell time' in modern bowling centres is three to four hours, rather than one to two hours in the older centres. An emphasis is now being placed on attracting existing customers to spend more on ancillary services, such as food and drink, and by providing higher quality facilities away from the bowling alley. Mintel (Ten Pin Bowling, 2006) also notes that recently, high-end, centralised venues have started to emerge, in order to dispel the commonly-held view that bowling is either passe or too youth-orientated.

#### ***Health and Fitness***

3.34 In 2003 there were some 2,850 private health and fitness clubs in the UK, compared to 2,325 clubs in 1998. Over the same period Mintel (2003) figures show that the number of private health and fitness club members increased by 75%. Mintel predicts that the industry will continue to grow, with the number of adult members of health and fitness clubs increasing by a further 52% over the period between 2003 and 2007.

3.35 Health and fitness is the fastest growing area of the leisure industry, and is a product of a general trend towards attaining a healthier lifestyle. Many of the major health clubs are operated by hotel chains and, as with other sectors in the leisure industry, offer a broad range of facilities and activities in one location. Brand identity is of considerable importance and, in this respect, there is likely to be an increasing tendency for various chains to offer something different. For example, many clubs are looking to branch out into hydrotherapy, sports therapy, injury treatment, outdoor facilities, social clubs, and spas. Increasingly there is a tendency to locate health & fitness clubs near employment centres in order to service workers' lunch-time and morning fitness requirements, and to maximise the potential for corporate membership.

#### ***Bingo and Casino***

3.36 Expenditure in Bingo clubs increased by 15% between 1998 and 2002 (Mintel, 2003). Over this period, attendance remained constant at around 80m admissions per annum which points to a trend of people spending larger amounts of money on gambling. However, Mintel (Bingo, 2005) identify that bingo has shown only modest growth since 2000, with total club turnover growing to just over £2billion in 2004, from £1.8billion in 2000, and the number of regular bingo players falling since 2001.

- 3.37 Expenditure in UK casinos increased by 27% between 1994 and 1999, whilst attendances increased by 6% (Mintel, 2004). The trend is for existing casino clients to spend increasing amounts of money, as with the bingo industry. However, Mintel forecast that the UK casino market is set to experience a boom time in the coming years, both in terms of expenditure and attendance. Mintel forecast that the industry will experience a growth in expenditure of 42% over the period 2004-2009. This is the least optimistic forecast. Other forecasts suggest that the UK casino market could more than treble in size over this period.
- 3.38 The predicted boom in the gambling leisure market is brought about by the passing of the Gambling Act 2005. The provisions of this Act are expected to stimulate value growth, with jackpot machines, increased prize funds and linked club facilities being introduced to bingo halls, and the lifting of restrictions covering taxation, licensing and marketing enabling casino operators to expand their operations. The market is highly optimistic and is anticipating considerable expansion in the next few decades, with considerable monies set to be spent in the case of bingo on attracting younger players and the works 'night-out' concept, and in the case of casinos increasing their appeal to a wider audience by providing new venues outside of traditional regional bases coupled with marketing campaigns.

### ***Eating and Drinking Out***

- 3.39 Key Note ('Leisure and Recreation Market', 2004) suggest that the British have been adapting to a more cosmopolitan lifestyle for many years, and that this process is continuing in the early 21<sup>st</sup> century. Busy modern lifestyles, which leave less time for cooking and eating formal meals at home, have driven demand for a variety of catering formats, including notably fast food for lunches and while travelling, traditional pan-Asian cuisine and pub food. This trend towards a continental style of eating and drinking, in outlets that double as bars and restaurants, is favoured by the Government whose new Licensing Act aims to encourage this trend. Overall, Key Note estimate that sales through main eating and drinking outlets rose by 6.2% over the period 1999-2003. They forecast that this upwards trend is set to continue with plenty of scope for UK consumers to eat out more in particular. The high street has been quick to innovate new eating and drinking concepts in this respect.

### **Summary**

- 3.40 The main spatial implications of recent trends are that larger retail stores serving an extensive catchment area replace a number of smaller stores and this is likely to continue throughout all retail sectors; consumer interest in larger retail formats appears unabated. Additionally, weakening consumer confidence is forcing retailers to re-evaluate their store portfolio, disposing of under-performing stores and concentrating on key locations. Smaller town centres are most

susceptible to these trends, along with larger town centres that find themselves facing stiff competition from nearby centres that offer more attractive and modern shopping environments.

- 3.41 New and innovative forms of retailing will continue to require new sites and premises, and not all retailers' preferred formats are likely to be accommodated in existing shopping centres. Successful town centres are likely to be those that respond to modern retailer requirements through the provision of appropriate floorspace and the availability of suitable development sites.
- 3.42 In terms of food shopping, there has been steady growth of expenditure in the grocery market (which includes expenditure on non-food items). Food superstores have been the main engine of growth in the grocery market, although there has been an overall decline in the number of smaller convenience stores. However, the rate of store closures has slowed in recent years, with smaller stores becoming more competitive and resilient. There has also been a significant expansion of the 'deep discount' food retail sector in the UK over the past decade or so.
- 3.43 The high levels of volatility in the grocery sector have led to intense competition between the largest supermarket operators with an emphasis on retaining or increasing market shares. There will be pressure for large out-of-centre stores to upgrade, including an increased element of non-food goods and associated services in order to create a one-stop shop destination.
- 3.44 The value of e-commerce is expected to continue to grow significantly in the coming years, and the more affluent members of society will be the most involved. The increasing use of e-commerce will have repercussions for the 'High Street' where the impact will be felt in some retail sectors (e.g. music, books, and small electrical goods) more than others (e.g. clothes and groceries).
- 3.45 In the leisure sector, further growth in demand is forecast for ten-pin bowling, health and fitness, gambling facilities and for venues catering for eating and drinking, with relatively lower demand likely to be manifest for new large scale cinema complexes (although operator demand is likely to continue for smaller outlets) and bingo facilities.

## 4 PLANNING GUIDANCE AND POLICY REVIEW

### Introduction

4.01 This section of the report summarises the policy context for retail and leisure uses within Wyre Forest District. This includes reference to national planning policy contained in Planning Policy Guidance Statement 6 (PPS6) together with the development plan. The development plan for the area comprises the West Midlands Regional Spatial Strategy (RSS), the Worcestershire County Structure Plan and the Wyre Forest District Local Plan. The key points of relevance from the above are summarised below, as are matters arising from other publications of relevance.

### Planning Policy Statement 6 – Planning for Town Centres

4.02 Planning Policy Statement 6 sets out the Government's national policies and principles relating to the future of town centres. The Government's key objective for town centres is to promote their vitality and viability. This will be achieved by:

- Planning for growth and development of existing centres; and
- Promoting and enhancing existing centres, by focusing development in such centres and encouraging a wide range of services in a good environment, accessible to all.

4.03 The objectives set out above should be read in conjunction with a set of further objectives as follows:

- Enhancing consumer choice by making provision for a range of shopping, leisure and local services, which allow genuine choice to meet the needs of the entire community, and particularly socially-excluded groups;
- Supporting efficient, competitive and innovative retail, leisure, tourism and other sectors, with improving productivity; and
- Improving accessibility, ensuring that existing or new development is, or will be, accessible and well served by a choice of means of transport.

4.04 Local Planning Authorities should actively plan for growth and manage change in town centres by:

- Selecting appropriate existing centres to accommodate the identified need for growth;

- Managing the role and function of existing centres; and
  - Planning for new centres of an appropriate scale in areas of significant growth or where there are deficiencies in the existing network of centres.
- 4.05 Where growth cannot be accommodated in identified existing centres and a need for further provision has been identified, Local Planning Authorities should plan for the extension of the primary shopping area.
- 4.06 In selecting sites for development, Local Planning Authorities should consider
- The need for development (having regard to both quantitative and qualitative factors);
  - Identify the appropriate scale of development. This should relate to the role and function of the centre within its catchment area;
  - Apply the sequential approach to site selection;
  - Assess the impact on existing centres; and
  - Ensure that locations are accessible and served by a choice of means of transport.

### **The Development Plan**

#### ***West Midlands Regional Spatial Strategy (2004)***

- 4.07 The strategic planning policy for the region is provided by the West Midlands Regional Spatial Strategy, Adopted 2004, formerly known as Regional Planning Guidance for the West Midlands. The RSS identifies the area as one where economic physical and environmental renewal should be a priority, particularly in the Major Urban Areas, and should be focused around improved infrastructure, diversification of the Region's economy, rural and urban renaissance within town and city centres in order to create modern and sustainable communities.
- 4.08 Outside the MUA's a number of large settlements are identified as sub-regional foci for accommodating significant growth, the nearest of which to Wyre Forest being Worcester. Kidderminster falls into the category of "Other Main Towns and Villages" in the settlement

hierarchy where the intention is to build on the settlement's locational strengths, environmental qualities, regeneration opportunities and linkages with its local hinterland, to deliver improved local services and to develop its own distinctive roles and character.

4.09 Under Policy PA11, Kidderminster is identified alongside 24 other town centres in the region as being a focus for major retail developments (i.e. those of more than 10,000 sqm gross floorspace), uses which attract large numbers of people including major cultural, tourist, social and community venues and large scale (i.e. over 5,000 sq m) leisure and office developments.

4.10 The Secretary of State identified a number of policy issues that needed to be addressed in future revisions to the RSS, which the Regional Planning Body agreed to look at in three phases:

- **Phase One** - Black Country Study.
- **Phase Two** - Was launched in November 2005 and will cover housing figures, employment land, transport and waste.
- **Phase Three** - is due to begin in Spring 2007 and will be looking at: critical rural services, recreational provision, regionally significant environmental issues and provision of a framework for Gypsies and Travellers sites.

***Draft Phase I Revision of the Regional Spatial Strategy: Black Country Study***

4.11 That Black Country Study has evolved into a draft Phase One Revision of the RSS, which is intended to provide strategic guidance for development and investment in the Black Country to 2021. The draft Phase One Revision proposes alterations to specific policies and paragraphs of supporting text in the current RSS and forms part of the wider process of revising and updating the RSS for the West Midlands.

4.12 The Draft Phase One Revisions to the RSS were presented to the Secretary of State in May 2006 and are currently undergoing a public consultation exercise which is due to end on 23 August 2006.

4.13 As part of the review process, a revised shopping strategy for the Black Country has been prepared. This has been based on technical evidence prepared on behalf of the Regional Planning Body in the following reports:

- Study of Black Country Centres – GVA Grimley (August 2005);

- Economic Impact of the Expansion of Brierley Hill/Merry Hill – Regeneris (April 2006);
- Assessment of Future Market Shares and Accommodating Future Needs – White Young Green (May 2006);
- Comparison of Out of Centre Retail Outlets – White Young Green (May 2006);
- Investment Analysis and Future Investment Potential of the Black Country Retail Centres – Chase Partners (March 2006);
- Complementary Centres Strategy – Dudley MBC (May 2006).

4.14 The result of the above research has led to the promotion of a retail strategy which would seek to focus major new comparison goods retail investment in the four “strategic centres” of Wolverhampton, Walsall, West Bromwich and Brierley Hill/Merry Hill. Of those four centres, Merry Hill is not currently recognised in the RSS as a town centre (as defined by PPS6). The draft RSS Revision Phase One therefore proposes to elevate the status of Brierley Hill/Merry Hill, while the role of Dudley town centre will be reduced to that of the non-strategic town centre.

4.15 At paragraph 4.6G of the draft RSS Review a “target” figure for additional comparison retail floorspace is indicated for the four strategic centres as follows:

	<b>gfa sq m</b>
Wolverhampton	54,000
Brierley Hill/Merry Hill	51,000
Walsall	45,000
West Bromwich	35,000
(Non strategic centres)	51,000
<b>Total</b>	<b>236,000</b>

4.16 The origin of the above figures is the various studies referred to above. The quantitative assessment of need was underpinned by large household shopping survey and was based on a combination of data and assumptions on population and expenditure growth, expenditure forecasts, market shares and the effects of non store retail activity such as e-commerce. Various alternative growth scenarios were tested, as were options for distributing and accommodating growth within the study area.

- 4.17 Assuming that the proposed comparison floorspace 'targets' set out in the draft RSS Review are ultimately approved by the Secretary of State, the subsequent implementation of any permitted development of significant scale at Merry Hill is unlikely to take place for a number of years, for the reasons explained below.
- 4.18 The growth of retail floorspace for comparison goods at Brierley Hill/Merry Hill is intended to be limited to 36,000sqm gfa over the period 2004 – 2016 under Policy PA 11A, subject to a number of conditions being met, including the adoption of an Area Action Plan for Brierley Hill and the implementation of major improvements to public transport (including the extension of the Metro from Wednesbury to Brierley Hill). These conditions will take several years to meet and it is highly unlikely that any major retail planning applications at Brierley Hill/Merry Hill would be permitted until after those conditions are met.
- 4.19 Thus, we conclude that if there is to be any significant change in shopping patterns associated with major retail expansion at Merry Hill that change will not be manifest until towards the end of, or more likely beyond, the five year review period (2006-2011) which we use (in line with PPS6 advice) for the assessment of quantitative need for new retail floorspace in the Wyre Forest Study Area. This is consistent with the conclusions reached by Roger Tym & Partners in the Regional Centres study (see below) who highlight that significant retail development at Merry Hill/Brierley Hill should not come forward until the first review if the RSS has been adopted, probably in 2007, and that the period to 2011 should be used to make progress with public transport improvements and widen the range of land uses in the vicinity (housing and offices).

***West Midlands Regional Spatial Strategy – Regional Centres Study***

- 4.20 This study, undertaken by Roger Tym and Partners in March 2006 sought to assist the Regional Planning Body in identifying the centres in the region where major new retail, leisure and office development should be focused in order to support urban regeneration.
- 4.21 With specific reference to Kidderminster the study identified that the town is 'showing signs of weakness'. The assessment of the health of Kidderminster highlights:
- poor/declining rental levels but good/improving yields;
  - moderate/static retail demand (requirements);
  - poor representation from high profile or large stores and a poor diversity of uses;
  - moderate/static vacancy rates; and

- good/improving retail ranking.

It is suggested that Kidderminster's relative poor performance in respect of key vitality and viability indicators is mainly due to the continuing propensity of Merry Hill, Worcester, and Birmingham to draw trade away from the town. More locally, it is suggested that shoppers are drawn away from Kidderminster's PSA due to newer developments outside it, such as Crossley Retail Park and Tesco. The PSA is noted as looking very dated and in need of further improvement.

- 4.22 The study tests various options for forecasting the need for additional comparison goods floorspace in the main centres over the period to 2021. In the case of Kidderminster, there is identified need for between around 7,000 and 15,000sqm net floorspace (depending on the assumptions used in the assessment).

***Worcestershire County Structure Plan (2001)***

- 4.23 Policy D.31 of the Worcestershire County Structure Plan sets out the retail hierarchy of centres within the County. Kidderminster is identified as a 'Major County Centre' as it has a dominant retail function within Wyre Forest District. Stourport on Severn is scheduled as a 'Minor District Centre' as it serves more local needs. The Policy requires that retail developments in these defined centres should be of an appropriate scale to the role of the centre and should help to reinforce the retail hierarchy.

- 4.24 Policy D.32 states that large scale developments, attracting many trips should be located in town centres. Failing this, in assessing sites for development and allocating new sites, Local Planning Authorities should have regard to the sequential approach to site selection. Policy D.33 expands on this, stating that proposals for out of centre retail developments that would attract a significant number of trips will be refused unless it can be demonstrated that a need exists and that there is no more suitable site available.

***Wyre Forest District Local Plan (2004)***

- 4.25 The Wyre Forest District Local Plan was adopted in January 2004. It will continue to provide the detailed basis for considering development proposals until at least Autumn 2008, when it will be replaced by Local Development Plan Documents.

- 4.26 The key aim of the Local Plan in relation to retailing is "to enable the provision of an adequate range of shops to meet the needs of shoppers from within the district and beyond." The following objectives are identified for the centres in Wyre Forest:

- **Kidderminster:** To safeguard and enhance the role of Kidderminster within the sub-regional retail hierarchy and as a focus for large scale retail development.
- **Stourport on Severn:** To safeguard and enhance the position of Stourport-on-Severn as a convenience centre and in meeting the day-to-day shopping needs of the towns residents and tourists.
- **Bewdley and Local Centres:** To encourage developments which help to maintain the presence of a suitable retailing mix in Bewdley and the numerous Local Centres of the District.

4.27 At paragraph 13.13 the retail hierarchy is set out. Kidderminster is identified as a Major County Centre, Stourport on Severn as a Town Centre and Bewdley as a District Centre. Additionally, a number of Local Centres are identified.

4.28 The policies regarding retail development in Wyre Forest District all have regard to the sequential approach. Policy RT.1 states that retail proposals of more than 250sq m will only be permitted where the sequential approach is followed. Additionally, proposals must accord with the retail strategy, be accessible by a choice of means of transport, not be on land allocated for other uses, not have serious impact on the vitality and viability of the town centre and not add significantly to the length of car trips.

4.29 Policy RT.3 relates specifically to Bewdley. This policy states that large scale retail proposals will not be permitted in Bewdley. Proposals within the district centre boundary will only be allowed where they;

- involve less than 50sq m net floorspace;
- involve a modest extension (less than 250sq m) to an existing unit;
- involve a change of use to retail; and
- meet an identified need.

Proposals involving a loss/reduction in floorspace will not be allowed where it may lead to a cluster of non retail uses and a significant erosion of the town's retail offer.

- 4.30 Policy RT.4 states that proposals for retail development outside the Primary Shopping Area will be limited to modest extensions and visual or functional enhancement of existing stores. Proposals leading to a significant increase in net floorspace must demonstrate a need and that no suitable sites are available within the Primary Shopping Area.
- 4.31 In respect of out-of-centre retail floorspace, the local plan strategy is to ensure that those units remain restricted in terms of range of goods and minimum size in order to prevent the migration of town centre retailers and ultimately to protect the viability and liveliness of the town centre.
- 4.32 Policy RT.6 relates to Local Centres. This policy states that proposals involving the enhancement and modest extensions of existing premises will be permissible. Proposals involving a change of use will be considered on their own merits.
- 4.33 Policy TC.2 states that within the Primary Shopping Areas and the Secondary Shopping Areas non retail uses shall not usually be allowed at the ground floor street level.
- 4.34 The Council has prepared town centre strategies for Kidderminster, Stourport-on- Severn and Bewdley, these are discussed below.
- 4.35 In Kidderminster a number of sites have been identified for redevelopment within the town centre inset area. These are as follows;

Kidderminster Town Centre Redevelopment Area (KTC.1)

This policy covers a large site of 10ha to the west of the existing town centre and provides an opportunity for comprehensive redevelopment to extend the Primary Shopping Area Westwards. This allocation is now substantially implemented with the development of Weavers Wharf.

Policy KTC.1 states that proposals for the redevelopment of the remaining area shall:

- Provide a mix of uses including A1, A2, A3, B1, D2 and C3;
- Retain the listed Slingfield Mill and other important buildings;
- Preserve or enhance the character of the Staffordshire and Worcester Canal;
- Maximise the natural assets of the site provided by the River Stour and Canal;

- Provide a safe and convenient environment accessible to the town centre;
- Take account of the care needed to develop a site which is contaminated as has a history of flooding.

#### Service Yards – Bromsgrove Street (KTC.2)

There is a recognition of a need for development of the rear service roads to facilitate the free flow of pedestrian and vehicular traffic within the town centre streets. This area is to be safeguarded for car parking or open space and service roads. Development, other than car parking, that will prejudice the implementations of any service roads in this area will not be allowed.

#### Worcester Street Enhancement Area (KTC.3)

An opportunity for development is provided by the relocation of the Magistrates Court to the former Cattle Market site off Comberton Hill. Given that the facade the building is a local landmark, the Council will seek a comprehensive scheme retaining the façade to create a high quality landmark building and landscape.

Policy KTC.3 will seek a mix of land uses including small scale A1, A2, A3, B1, D2 and C3 uses. It will also seek to incorporate and redevelop the temporary shop buildings between Worcester Street and Oxford Street and also to include measures to improve connectivity with Comberton Hill.

#### Green Street/New Road Mixed Use Area (KTC.4)

The northern area still consists of a number of carpet factories whilst those in the southern area have generally been converted. Should these factories become surplus to requirements or subject to pressure for change the Council will seek to negotiate appropriate conversions for a mix of uses on the northern part of the site. They will also resist further retail growth in accordance with policies RT.1 and RT.2.

Proposals should:

- Retain and use the listed Mortons Works and Stourvale Mills buildings;
- Incorporate and enhance the environment of the River Stour;

- Safeguard the nature conservation and visual value of the river Stour and Ring Road escarpment;
- Improve connectivity with the Primary Shopping Area and Comberton Hill;
- Provide a mix of uses including A3, B1, C3 or D1;
- Uses such as a hotel may be acceptable, proposals will be assessed on their own merits;
- Proposals involving predominantly D2 uses (leisure/recreation) will be allowed;
- Take account of flood risk.

4.36 A number of sites are also discussed in the Local Plan for Stourport on Severn. These are as follows:

Severn Road – Lichfield Basin (STC.1)

This site is at the heart of the Severn Road redevelopment area. This important site is also the subject of further Supplementary Planning Guidance, discussed below. Development on this site shall:

- Consist of a mix of residential and food and drink uses;
- Retain and use the Listed Basin walls;
- Involve at least the partial re-opening of the basin to form a significant waterspace;
- Take full account of the Severn Road Development Brief and Lichfield basin Design Guidance;
- Take account of flood risk and contamination.

Severn Road – Carpets of Worth Site (STC.2)

The Carpets of Worth site is the largest of the three sites covered by the Severn Road Development Brief. The Local Plan identifies that the area is suitable for a mix of uses, including business (B1), residential (C3) and should there be a demonstrable need during the Plan period to 2011, a possible new food supermarket (A1).

Development on this site should provide:

- A mix of land uses including B1 Business and C3 residential. Retail uses may be acceptable subject to the retail policies;
- Retain and use the important buildings identified in the development brief;
- Preserve or enhance the Conservation Area;
- Safeguard/enhance the natural assets of the site provided by the River Stour and the design of the scheme;
- Take account of the flood risk and contamination;
- Be accessible via a new road to be provided as part of the redevelopment, linking the site with Discovery Road.

#### Severn Road - Vinegar Works and Cheapside (STC.3)

The closure of the vinegar works presents a number of opportunities. It is envisaged that this site will be redeveloped for a mix of uses to include business and residential uses. The site includes a listed building, residential property and factory units. Development proposals must have regard to neighbouring land uses. The Council will seek to secure improved access to business premises that connect with the new link road proposed as part of the proposals for the Carpets of Worth Site.

#### Bridge Street Enhancement Area (STC.4)

Proposals for this site should;

- Include a mix of uses including small scale retail or food and drink at ground floor with offices or residential uses above and to the rear;
- Preserve or enhance the character of Bridge Street, the basins and the River Severn;
- Improve connectivity between the town centre and the basins.

### Canal basins Area (STC.5)

Proposals for the enhancement of the Canal Basins Area, which invest in its role as a tourist and visitor attraction and recognise its Conservation Area status, will be permitted, subject to compliance with all other relevant policies in the Local Plan.

### ***Leisure***

- 4.37 The Local Plan seeks to ensure that land and facilities are available, in appropriate locations, for both organised and informal sport and recreation activities. The needs of local residents and visitors should be met, and proposals involving the loss of existing facilities resisted.
- 4.38 The Local Plan seeks to locate commercial leisure facilities in Kidderminster as it is the districts largest and most accessible centre. Policy TC.3 relates specifically to commercial leisure facilities. This states that subject to other material considerations and policies, major new commercial leisure development will be allowed within Kidderminster town centre on a suitable identified site. Where there is no suitable site in the town centre a sequential approach to site selection will be adopted.
- 4.39 In accordance with Policy LR.17 which seeks major new commercial leisure developments in Kidderminster and Stourport on Severn, the Council will encourage proposals for a cinema and other intensive commercial leisure facilities in Kidderminster town centre and a number of potential sites are identified.

### **Supplementary Planning Guidance and Other Documents**

#### ***Wyre Forest Retail and Commercial Leisure Study (2001)***

- 4.40 A Retail and Commercial Leisure Study was undertaken in 2001 by MVM Planning. This assessed the health of the retail sector and the capacity for further convenience and comparison goods retailing together with commercial leisure capacity.
- 4.41 This study identified that in Kidderminster, by 2011 there will be capacity for either two discount stores (max 2,104 sq m net) or one small supermarket (max 1,044 sq m net).
- 4.42 In Stourport-on-Severn, the study indicates that there is capacity to support one to two discount stores (max combined 1,597 sq m net) by 2006. Only if none of the identified capacity is absorbed by discount retailers between 2001 and 2011 will there be sufficient capacity to support one supermarket (max 1067 sq m net) operated by one of the big five grocery retailers (Tesco,

Sainsbury's, Asda, Safeway and Morrisons). Sufficient land is considered to be available to meet the needs of Stourport-on-Severn.

- 4.43 In terms of non food retailing the study identified that there is little capacity for further non food retailing in the three main towns. Any capacity existing in Kidderminster was expected to be absorbed by the development at Weavers Wharf.
- 4.44 The study identified a quantitative requirement for a new cinema complex within Kidderminster to serve the district as a whole. It also identified a need for a small ten pin bowling facility within the district as a whole. A qualitative need was identified for a large commercial leisure outlet to provide an alternative to the Glades leisure centre within Kidderminster over the plan period. There was considered to be scope for part of the above needs to be met as part of the KTC1 site development (phases 2-4). There was considered to be no immediate or foreseeable qualitative need for other commercial leisure facilities within the district or the constituent towns.

***Wyre Forest District Retail Monitoring Report (2005)***

- 4.45 This document provides an update on the retail situation in the District to complement the findings of the Wyre Forest Retail and Commercial Leisure Study.
- 4.46 The study identifies that
- Kidderminster has seen a period of significant redevelopment since 2000 including the Weavers Wharf development (25,613 sq m gross floorspace) and Crossley Retail Park (32,663 sq m gross floorspace). These developments have brought a number of new national brands to Kidderminster. Additionally, there have been a number of changes to the retail profile of Kidderminster: the clothing sector has expanded and now offers a wider variety of outlets, two of the towns nightclubs have become vacant, although there has been further provision of restaurants and a new leisure and fitness club.
  - Stourport on Severn centre has a limited sphere of influence over the local catchment due to the size of the centre, physical factors and its proximity to Kidderminster.
  - Due to the constraints on the centre there is little scope for further retail development within Bewdley centre, additionally many of the units are small scale and do not lend themselves to modern retail needs. A significant proportion of the units are independently owned and there are few multiple national retailers. However, the centre's role as a tourist destination helps to sustain its levels of vitality and viability.

**Bridge Street Basins Link, Stourport on Severn Development Brief (2005)**

- 4.47 This site in has been designated for mixed-use redevelopment. At ground floor level this entails small-scale retail and/or food and drink uses. Above and to the rear office and/or residential uses

are proposed. The development brief aims to preserve and enhance the character of Bridge Street, the Basins and the River Severn and also to improve connectivity between the town centre and the basins.

Severn Road, Stourport on Severn Development Brief (2001)

- 4.48 This development brief covers three sites (Lichfield basin, Carpets of Worth and Cheapside) and includes all of the land to the east of Severn Road and Mart Lane up to the River Stour, covering a total of 10 hectares. The site is significant due to its size and its sensitive position relative to the basins and Rivers Severn and Stour. The brief sets out the broad development proposals for the site. It is considered that redevelopment consisting of a mix of uses including retail and residential will enable the area to complement the tourism basins and the town centre. It is also identified as important to maintain a residual element of land for employment uses.

Lichfield Basin, Stourport on Severn Design Guidance

- 4.49 The objective of this document is to reclaim and develop the Lichfield Basin with water frontage as a vibrant, prosperous and safe visitor attraction as well as providing a high quality environment for work, living and leisure. The design guidance provides a framework for the redevelopment of the former Lichfield Basin, seen as a key opportunity to assist in the wider regeneration of Stourport.

## 5 RETAIL & LEISURE PROVISION IN WYRE FOREST DISTRICT (HEALTH CHECK)

### Introduction

5.01 This section of the study provides an overview of the existing retail and leisure provision within Wyre Forest District. An overview of the sub-regional context of the study area is provided, followed by an assessment of the 'retail health' of each of the centres (Kidderminster, Stourport on Severn and Bewdley).

5.02 For each of the three town centres a review of the levels of vitality and viability is given with reference to the indicators outlined in PPS6, Chapter 4. The information for this section of the report was obtained from:

- Visits to the centres to observe the overall range and quality of provision, assess levels of trade, pedestrian activity and environmental quality;
- Existing retail and leisure studies;
- Household Shopping Survey;
- On street Shoppers Survey;
- The local (town centre) business survey;
- Information on commercial yields gathered from the Valuation Property Market Report, 2006; and
- Focus database.

### Sub-Regional Context

5.03 Wyre Forest is located in the West Midlands Region. The Regional Spatial Strategy for the West Midlands identifies Major Urban Areas (MUA's), Sub Regional Foci and Other Large Settlements. In Wyre Forest District only Kidderminster is identified as an 'Other Large Settlement'. A plan setting out the Sub-Regional Shopping Hierarchy is contained at **Appendix A**.

5.04 Management Horizons (2003/04) rates towns and shopping centres using a straightforward weighted scoring system which takes account of each location's provision of multiple retailers and anchor store strength. This index establishes eight distinct grades of retail location from 'Major City' to 'Local'. Figure 5.1 below shows the rankings of the centres within Wyre Forest and in the surrounding sub region.

**Fig 5.1 Management Horizons Retail Rankings**

<b>Centre</b>	<b>Centre Classification</b>	<b>MHE Index Score 2003-2004</b>	<b>Ranking 2003-2004</b>
Birmingham	Major City	307	6
Wolverhampton	Regional	181	47
Worcester	Regional	175	54
Merry Hill	Regional	170	61
Walsall	Regional	152	82
<b>Kidderminster</b>	<b>Sub-Regional</b>	<b>113</b>	<b>156</b>
Redditch	Sub-Regional	109	165
Dudley	Major District	64	301
Bromsgrove	Major District	58	336
Halesowen	District	50	391
<b>Stourport on Severn</b>	<b>Minor District</b>	<b>24</b>	<b>773</b>
Droitwich Spa	Minor District	22	829

Source: Management Horizons Europe: UK Shopping Index 2003/2004

- 5.05 The table above shows the relative scores and rankings of the centres within the District and the surrounding centres. Of the centres in the District, only Kidderminster and Stourport on Severn feature in the Management Horizons listings. Kidderminster is classified as a Sub-Regional Centre whilst Stourport on Severn is classified as a Minor District Centre. The table suggests that shopping patterns in the study area are likely to be strongly influenced by the greater strength, diversity and attractiveness of the retail offer at higher order centres such as Worcester, Merry Hill\*, Wolverhampton and Birmingham. Birmingham, classed as a Major City, is the highest ranking centre in the West Midlands area. Walsall and Wolverhampton are both classed as Regional Centres and they are therefore likely to have some influence on local resident's shopping preferences.
- 5.06 Evidence gathered from the household shopping survey carried out as part of this study provides information regarding the current shopping patterns of residents, including the extent to which other centres in the sub-region are used by Wyre Forest residents. The results of this survey are discussed in the following section of this study.

\* Merry Hill is not (yet) a designated centre in terms of PPS6 definitions.

## Study Area Shopping Hierarchy

- 5.07 The Wyre Forest District Local Plan sets out the hierarchy of existing shopping centres within the study area. Kidderminster is identified as a Major County Centre, Stourport as a Town Centre and Bewdley as a District Centre.
- 5.08 A range of local centres are also identified, ten of these are located within the built up area of Kidderminster, three in Stourport on Severn, and one in Bewdley. Additionally, there are three designated villages found within the District (Blakedown, Chaddesley Corbett and Cookley).
- 5.09 Crossley Park, which lies to the north west of Kidderminster Town Centre, beyond the Ringway, is the District's only major out-of-centre retail location. Many large national bulky goods retailers are represented here including Currys, PC World, Staples, Dreams, Halfords and Carpet Right. Other large retail floorspace units at Kidderminster are dispersed within the built up area and consist of a Sainsbury's store at Crossley Park, a Co-op store at Franche Road, a B&Q Warehouse on Green Street, a Magnet outlet and a Focus Do-it-All at Holbrook Trading Estate. At Stourport, there is very little out-of-centre retail provision with the only major outlet being a Wileys DIY store at Sandy Lane Industrial Estate.
- 5.10 There are 10 defined 'groups of small shops' in the adopted Local Plan, five of which are located at Kidderminster, two at Stourport, one at Bewdley with the remaining two located at the villages of Fairfield and Wolverley. These groups of small shops meet the day to day convenience needs of local residents.

## Kidderminster Town Centre

### *General Description*

- 5.11 Kidderminster is a medium sized historic town located to the southwest of the West Midlands conurbation. The centre is bounded on three sides by the inner ring road (The Ringway) and on the fourth (west side) by the Staffordshire and Worcestershire Canal. The town centre shopping area has recently been extended with the (phased) opening of the Weavers Wharf development. Officially opened in 2004, the scheme consists of some 25,613sqm (gfa) of retail and leisure floorspace, including a 7,590sqm (gfa) Tesco foodstore. The Weavers Wharf development has had the affect of shifting the focus of shopping activity in the town centre towards this development, as demonstrated by the relocation of a number of major retailers to Weavers Wharf and closure of other stores within the traditional heart of the centre. Accordingly, while the town centre as a whole appears to have benefited from the introduction of modern large format retailing floorspace at Weavers Wharf, it has made some parts of the town centre vulnerable.

- 5.12 Shopping provision in Kidderminster Town Centre has traditionally been focused on the pedestrianised area in and around High Street, including Worcester Street and Vicar Street. Within that area are the purpose-built Swan Shopping Centre and Rowland Hill Centre, both of which provide undercover shopping environments. Whilst both these centres have recently been refurbished, they provide a relatively poor quality shopping environment compared to more modern examples of indoor shopping malls. The Rowland Hill Centre remains in poor condition and is occupied by a number of independent or discount retailers.
- 5.13 The Weavers Wharf development provides a higher quality shopping environment and floorspace more suited to modern retailer requirements. The final phase of this development is currently being completed, involving the conversion of the Piano building to mixed retail/food and drink uses. We also understand that there are current plans to reconfigure and extend some of the existing floorspace, in order to meet the needs of a wider range of formats.
- 5.14 The Kidderminster Town Centre survey area adopted by Goad differs from the defined Primary Shopping Areas shown on the Local Plan Proposals Map (the Goad Plan for Kidderminster Town Centre is contained at **Appendix B**). The Primary Shopping Area includes the units fronting Worcester Street, High Street, Vicar Street and those situated between Bridge Street and Market Street. An indicative arrow on the proposals map indicated the westward extension of the PSA following the opening of the Weavers Wharf development. The Goad plan for Kidderminster is more extensive, covering the Weaver's Wharf development, the Secondary Shopping Area (Lower Mill Street, Market Street, Blackwell Street, Coventry Street, the southern end of Worcester Street, Oxford Street and New Road), as well as Waterloo Street and the Tesco foodstore at Castle Street. In the assessment below we use the Goad definition of the town centre, as used in the previous retail study, to enable consideration of changes to the centre over time on a consistent basis.

### ***Composition of Town Centre***

- 5.15 The town centre accommodates a wide range of uses other than retail, these include food and drink, assembly and leisure, administrative and employment. The on-street survey found that 21% of those surveyed visited the centre due to work/school/college commitments, therefore suggesting that the centre is also a focus for work/learning activities.
- 5.16 There are 275 retail outlets in total (including A2 and A3 uses) in Kidderminster Town Centre (at February 2006). The breakdown of units within the centre, by the categories adopted by Goad, is summarised in Figure 5.2 below.

**Figure 5.2: Retail Composition of Kidderminster Town Centre**

Retail Sector	No. of Units		%		UK Average %
	Nov 1998		Feb 2006		
Convenience	16	6	18	7	9
Comparison	146	59	141	51	47
Service	66	27	79	29	32
Vacant	18	7	34	12	10
Other	3	1	3	1	1
<b>Total</b>	<b>249</b>	<b>100</b>	<b>275</b>	<b>100</b>	<b>100</b>

Source: Experian Goad Survey November 1998, October 2005 (updated in February 2006 by White Young Green Planning).

Note: Figures may not add due to rounding

5.17 In summary, the above table demonstrates that between November 1998 and February 2006:

- The number of units in the centre has increased by 26 units. This is due in part to the new Weavers Wharf development which has provided a significant extension to the town centre.
- The number of convenience units increased slightly to 18, accounting for 7% of all units which is just below the national average of 9%.
- There has been a slight decrease in the number of comparison units from 146 to 141, now accounting for 51% of all units. This is just above the national average of 47%.
- The number of units within the service sector has increased significantly by 13 units. Service units now account for 29% of all retail units, which is slightly below the national average of 32%.
- The number of vacant units has increased significantly by 16 units (5%). The vacant sector now accounts for 12% of all units, this is slightly above the national average of 10%.

5.18 The following table illustrates how the breakdown of the floorspace composition of Kidderminster town centre has changed over time:

**Figure 5.3: Floorspace Composition of Kidderminster Town Centre**

Retail Sector	Floorspace (000d's sq m gross)	%	Floorspace (000d's sq m gross)	%	GB Average %
	2000		2005		
Convenience	8.74	14	14.86	17	17
Comparison	40.24	63	44.50	52	53
Service	10.93	17	14.86	17	21
Vacant	3.31	5	10.78	13	8
Other	0.67	1	11.15	13	9
<b>Total</b>	<b>63.89</b>	<b>100</b>	<b>96.15</b>	<b>100</b>	<b>100</b>

Source: Experian Goad Surveys 2000 and 2005

Note: Figures may not add due to rounding

The above table demonstrates the following;

- The amount of convenience floorspace in Kidderminster increased by over 5,000sqm between 2000 and 2005, now accounting for 17% of all floorspace. This is largely a result of the new Tesco store that opened in February 2002 at Castle Road (which has more than compensated for the closure of the town centre Waitrose store over that period);
- The amount of comparison floorspace has increased by over 4,000 sq m between 2000 and 2005. This is due to the opening of the Weavers Wharf development which provides a significant amount of new comparison floorspace. However, it is noteworthy that due to changes in other sectors the proportion of comparison floorspace has actually decreased by almost 11%, to a level more consistent with the national average (53%);
- The service sector has also seen an increase in floorspace of almost 4,000sq m, although its percentage share has remained relatively constant;
- The total floorspace accounted for by vacant units has risen by over 7,000sq m between 2000 and 2005. This represents an increase of 12%. There are a number of large vacant units, the most significant of these are the former Waitrose store in the Swan Shopping Centre, the former Marks and Spencer store on High Street (although this store has been occupied frequently on a temporary basis over that period) and the former indoor markets on Worcester Street. The 2005 level of vacant floorspace is over 4% higher than the (2005) GB average.
- In the 6 months since the Goad data was updated, there have been some notable changes in the Town Centre. The centre has lost two national comparison goods retailers operating out of

relatively large units, namely BeWise and Littlewoods. The large Waitrose unit in the Swan Centre has also been re-occupied by a discount comparison store. Additionally, it is noted that Premier Sports unit in the Swan centre is closing down. These recent changes suggest that the composition of the town centre, particularly the traditional core area, is in a state of flux and is sensitive to variation in market conditions in other parts of the centre or in the wider area.

### ***Retailer Representation and Requirements***

- 5.19 National multiple retailers are reasonably well represented in Kidderminster Town Centre, with stores including Woolworths, Marks and Spencer, Boots the Chemist, Next, Brantano, TK Maxx, JJB, WH Smith, TJ Hughes, Argos Catalogue Showroom, Wilkinson, Rosebys, Top Shop, Dorothy Perkins, Peacocks and New Look. However, despite the arrival of TK Maxx and an improved range offered by Next, there remains a noticeable lack of quality fashion stores, department stores and variety stores within the Town Centre with the range of operators represented giving rise to the impression that the centre is orientated to meet mainly discount comparison shopping needs, particularly in the traditional core shopping area. The poor provision of department stores has been compounded by the recent closure of Littlewoods. The multiple nationals tend to be located at the Weavers Wharf development and around the pedestrianised area of the Town Centre. In particular, the higher-quality retailers, such as Next and Marks & Spencer are now generally located at Weavers Wharf. However the Marks and Spencer unit is small relative to that operator's store portfolio and carries a restricted range of goods.
- 5.20 National retailer representation in the centre has been strengthened, on balance, by the Weavers Wharf scheme. This development incorporates, in addition to the stores mentioned above, JJB Sports, TK Maxx and Brantano, as well as, in the service sector Frankie & Benny's and Pizza Hut. However, it is apparent that the traditional shopping area is continuing to be witnessing a change in function towards discount retailing, as evidenced by the recent introduction of B&M Bargains in the former Waitrose unit.
- 5.21 Information gathered from Focus, a web-based database supplying commercial property information, demonstrates that representation by national multiple retailers is lower in Kidderminster than in surrounding higher order centres. For example, Kidderminster has 55% of the top 20 UK retailers, whereas Worcester, Wolverhampton and Birmingham all have 80% of these retailers.
- 5.22 The household survey indicates that visitors perceive the quality and choice of shopping and service facilities in Kidderminster as average to good. However, 16% of those surveyed identified that an increased choice and range of shops would encourage them to visit the town centre more frequently.

- 5.23 In the convenience sector, Kidderminster Town Centre is served by an Iceland, Morrison's, Tesco, Aldi store and a Netto (within the Local Plan defined Town Centre Area). Of those, only the Iceland store falls within the Local Plan-defined PSA, so that the others are edge-of-centre, and in the case of Netto, out-of-centre. There is also a Sainsbury's store close to the town centre in the Crossley Retail Park. The recent business survey indicates that traders in Kidderminster believe the town is well-served in respect of convenience retailing.
- 5.24 Information gathered from Focus regarding current 'retailer' requirements, indicates that there are currently 47 outstanding requirements from multiple retailers for a presence in Kidderminster including, Debenhams, Homestyle Group, Pets at Home, Moss Bros, The Body Shop and the Carphone Warehouse (the latter now is represented in Crossley Retail Park). A table containing details on these requirements is provided at **Appendix C**. It is particularly relevant to note the presence of Debenhams on the Focus database, since Kidderminster Town Centre currently does not have a key department store.
- 5.25 Clearly, the introduction of Debenhams would represent a significant improvement to the shopping offer of the town centre, and it will be important to consider the prospects of this happening, especially the likely availability of a suitably sized and configured unit. In this regard, we are aware that there has been recent interest in reconfiguring and extending floorspace at Weavers Wharf in order to accommodate the requirements of a different format store, although the current position is uncertain due to a change in ownership of Weavers Wharf.

### ***Leisure Representation***

- 5.26 In terms of leisure provision Kidderminster Town Centre benefits a bingo hall and several pubs, clubs and restaurants. There is also a cinema and a number of sports and fitness clubs located outside the defined town centre. The business survey highlighted a general concern from traders regarding the adequacy of leisure facilities in Kidderminster and the household survey indicates that additional leisure facilities such as a new cinema would encourage people to visit Kidderminster more frequently.

### ***Vacancies***

**Figure 5.4: Vacancies in Kidderminster Town Centre**

	November 1998		February 2006		UK Average 2005
	No. of Units	%	No. of Units	%	%
<b>Vacancy Level</b>	18	7	34	12	10

Source: Experian Goad/ Updated Land Use Survey

- 5.27 Figure 5.4 above shows that in February 2006 there were 34 vacant units in Kidderminster Town Centre, accounting for 12% of all units. This is a significant rise when compared to the figures for 1998. These units are generally located in the secondary retail frontages in the town centre. This rise in vacancies can be attributed partly to national chain failures and partly due to the fact that a number of retailers have either vacated the centre (eg. Waitrose and Littlewoods) or relocated to the Weavers Wharf development (such as Next and Marks & Spencer). The vacancy rate does give rise to a degree of concern, and it is relevant to note that the business survey found that traders were experiencing disappointing trade in recent times which in part was attributed to the town centre having *'too many vacant units'* and because *'relocations are decreasing trade'*.
- 5.28 There were 4 large vacant units in the town centre at the time we updated the Goad. Since that time we note that the former Waitrose unit in the Swan Centre has now been re-let to a discount comparison goods retailer, but new large vacant units have emerged with the closure of Littlewoods and BeWise, both of which are in the Secondary Shopping Area. An important consideration is the prospect of these key vacant units being re-occupied by key national retailers.
- 5.29 The former Waitrose store in the Swan Shopping Centre has been vacant for a considerable number of months and the prospects for it being re-occupied by a foodstore operator as the centre's anchor store have been undermined by the development of the Tesco store at Weavers Wharf. While the unit's current occupation by a bargain retailer can be considered preferential to the unit remaining vacant, it is indicative of the change in fortunes of that centre, which has become somewhat more peripheral since the advent of Weavers Wharf. Any plans for its long term future should include the option of redevelopment to create retail units which are more commercially attractive together with a mix of complementary uses.
- 5.30 The former Marks and Spencer unit on High Street is also likely to become more attractive if the adjacent Swan Shopping Centre is redeveloped and consequently the retail gravity may begin to shift back from Weavers Wharf towards the traditional shopping hub. We understand that there is current developer interest in sub-dividing this unit and we consider that this would also improve the prospects for re-occupation.
- 5.31 The former indoor markets and adjoining furniture store on Worcester Street represents a key redevelopment opportunity (it is allocated under Policy KTC 3), although again, this part of the town centre is peripheral and is unlikely to be attractive to key national multiple retailers at present. The prospects for occupation by other town centre uses (eg. leisure) are likely to be better. The prospects for this part of the town centre will be influenced by what happens with the current Morrisons foodstore, as there are current proposals for a replacement store.
- 5.32 The BeWise and Littlewoods units occupy prime frontage in an area of the town centre that has

traditionally enjoyed good levels of pedestrian footfall. Therefore, we consider the prospects for re-occupation to be reasonable, although based on recent trends, the likelihood is that these units will be taken up by discount-orientated retailers, rather than the UK's top retailers.

- 5.33 Other vacant units are small-scale and are predominantly spread amongst the secondary shopping frontages.
- 5.34 It is clear that the key vacant units in the town centre are unlikely to be attractive to quality national retailers, given their configuration and location. In this regard, the current prospects of retailers such as Debenhams coming into the Town Centre must be regarded as poor unless new retail floorspace is made available or significant reconfiguration of floorspace takes place.

### **Commercial Yields**

- 5.35 As a measure of retail viability, yields are a valuable indicator. The level of yield broadly represents the market's evaluation of the risk and return attached to the income stream of shop rents. Yields measured consistently over time can give an indication of the direction in which confidence in the retail strength in a particular town is moving. Low yields indicate that a town/city is considered to be attractive and as a result be more likely to attract investment than a town/city with high yields. Figure 5.5 below sets out the shopping centre yields for Kidderminster and neighbouring centres (where information is available) over the last five years.

**Figure 5.5: Shopping Centre Yields**

	%Yield									
	4/01	10/01	4/02	10/02	4/03	1/04	7/04	1/05	7/05	1/06
<b>Kidderminster</b>	8	7.5	7.75	7.5	7.5	7.5	7.5	7.5	7.5	7.5
<b>Birmingham</b>	5	5	5	4.75	4.75	5	5	5	5	
<b>Redditch</b>	5.25	5.25	5.25	5.25	5.25	5.25	5.25	5.25	5.25	5.25
<b>Stourbridge</b>	9	9	9	9	9	9	9	9	9	8
<b>Dudley</b>	9	8.75	8.75	8.75	8.75	8.75	8.75	8.75	8.5	8.5
<b>Bromsgrove</b>	8	8	8	8	8	8	8	8	8	7
<b>Halesowen</b>	8.5	8.25	8	8.25	8.25	8.25	8.25	8.25	8.25	8.25
<b>Stourport on Severn</b>	9.5	9.25	9.25	9.25	9.25	9.25	9.25	9.25	9.25	8.5
<b>Worcester</b>	4.75	4.75	4.75	4.75	4.75	4.75	4.75	4.75	4.75	4.75
<b>Droitwich</b>	7.5	7.5	7.5	7.5	7.5	7.5	7.5	7.5	7.5	7.5
<b>Leominster</b>	10	10	10	10	10	10	10	10	10	10

<b>Bridgnorth</b>	11	11	10	10	10	10	8.5	8.5	8.5	8.5
<b>Ludlow</b>	11	11	10	10	10	10	9	9	9	9

Source: Valuation Office Property Market Report, January 2006

- 5.36 The table above demonstrates that yields in Kidderminster have remained static since 2001 as have yields for the main competing centres. This suggests that Kidderminster has retained its attractiveness relative to competing centres. Kidderminster has lower yields than a number of surrounding centres, indicating higher levels of investor confidence. However, Birmingham, Redditch and Worcester all display significantly lower yields than Kidderminster, indicating that investor confidence is higher for these centres. Redditch is a similar sized town to Kidderminster with comparable levels of town centre floorspace. The key difference is that the Redditch Town Centre retail area is housed predominately in a large purpose built shopping mall under single private ownership, where significant levels of sustained investment has taken place in recent years to improve the range and quality of provision.

### **Rents**

- 5.37 Zone A rents reflects retailers' perceptions of a town centre. Because retailers consider rent to reflect the margin between turnover and operational costs (plus profit), the better the trading prospects the higher the rent that the operator will be willing to pay. Figure 5.6 below sets out the Zone A rents for Kidderminster and surrounding centres where data is available.

**Figure 5.6: Zone A rents**

	Rents (£/sq ft)					
	2001	2002	2003	2004	2005	2006
<b>Kidderminster</b>	65	65	65	65	65	70
<b>Birmingham</b>	330	310	285	300	325	325
<b>Redditch</b>	110	110	110	110	115	115
<b>Stourbridge</b>	40	40	40	45	45	50
<b>Dudley</b>	50	50	50	50	50	50
<b>Bromsgrove</b>	50	55	60	60	60	65
<b>Halesowen</b>	45	50	50	55	65	70
<b>Worcester</b>	150	150	150	160	160	170
<b>Droitwich</b>	-	35	35	40	50	50

Source: Focus database

- 5.38 The table above indicates that the Zone A rental values for Kidderminster have remained static at

£65/sq ft since 2001 with a marginal increase to £70/sq ft from 2005-2006. The table demonstrates that, as would be expected given its size, Birmingham has significantly higher rents of £325/sq ft than Kidderminster. Redditch and Worcester both have rental values (£115/sq ft and £170/sq ft respectively) that are higher than Kidderminster whilst the other centres in the surrounding area have rental values that are similar or approximately £20/sq ft lower than Kidderminster. All centres in the area have experienced a degree of increase in rental values since 2001. The fact that Kidderminster has experienced stable rents with a recent increase and that these values are comparable to other, similar centres suggests that retailers are confident about the trading prospects of Kidderminster.

### ***Pedestrian Flows***

- 5.39 The highest pedestrian flows within the town centre are observed along the pedestrianised streets of Vicar Street, High Street and at the northern end of Worcester Street, where the majority of national multiple retailers are located. The recent Weaver's Wharf development also generates high levels of footfall. Pedestrian flows decrease gradually outside these areas and within the more peripheral shopping areas of the town, such as along Blackwell Street, Coventry Street and at the southern end of Worcester Street.

### ***Accessibility***

- 5.40 Kidderminster is relatively easily accessible by both public and private transport. A new and improved bus station has recently been developed as part of the Weaver's Wharf scheme. Bus services connect Kidderminster to all the nearby larger towns, as well as surrounding residential areas. Kidderminster is also served by a railway station which is located within walking distance of the town centre. This provides direct links to Birmingham and Worcester.
- 5.41 In terms of private transport, Kidderminster Town Centre is readily accessible from two major roads, the A449 (Wolverhampton Road) and the A456 (Bewdley Road) which link the town to the M5 Motorway. However, the area in and around the town centre is frequently congested at peak times, which may be acting as a detractor to visiting the town centre by car. The town is served by a number of public car parks, the largest of which are provided at the Tesco foodstore (approx 500 spaces) and at Weaver's Wharf (402 spaces), the former being free for up to 2 hours. The on-street survey, carried out in February 2006, found that 45% of visitors use their car to access the town centre and that the Pike Mills car park and the Swan Centre car park were the most heavily used at that time (although our own survey of car park use suggests that the Swan Centre car park is not well used now (Oct 2006). In Section 11 of this report we carry out an audit of town centre car parking facilities in order to provide specific recommendations on the need for additional provision.

- 5.42 The household survey shows that, on the whole, visitors perceive Kidderminster's accessibility by car to be good (only 8% considered accessibility by car to be poor). However, it was identified that additional less expensive, parking would encourage people to visit the town centre more frequently. In terms of public transport there was a fairly even divide between responses of good, average and poor. 53% of respondents answered 'Don't know' to this question suggesting that they do not use public transport. The survey indicates that more frequent and cheaper public transport would encourage more visits to the centre. In general, accessibility to the centre by foot was considered to be good (38%).
- 5.43 The on-street survey within the town centre (the results of which are summarised at **Appendix D**) also confirms that the main mode of transport used to access the town centre is the car. However, this survey indicates a relatively high proportion of visitors access the centre by foot (22%).
- 5.44 The centre provides a relatively safe and accessible pedestrian environment, particularly given to the extensive pedestrianised area focused around High Street, Vicar Street, Worcester Street and Market Street. The Swan Shopping centre and Rowland Hill Centre provide safe, covered shopping environments. The majority (61.8%) of those surveyed as part of the household survey indicated that the centre provides a 'good' level of pedestrian movement. However, at the boundaries of the core shopping area there are several road junctions that present significant barriers to pedestrian movement between the town centre and surrounding areas including some of the key public car parks. These are New Road/Oxford Street, Prospect Hill/Worcester Street, and Blackwell Street/Coventry Street. Pedestrian access between the town centre and the residential areas which lie on the other side of the Ring Road is also hampered by the relatively few crossing points available.

### ***Environmental Quality***

- 5.45 The environmental quality in parts of the town centre has improved considerably over the past few years as a result of major redevelopment schemes and programmes of public realm improvements. In particular the Weavers Wharf development provides an attractive shopping environment, is well maintained and free from litter and graffiti. The older part of the centre, in particular the Swan Shopping Centre, demonstrates lower levels of environmental quality and visual attractiveness. There is some evidence of litter and graffiti and a number of the vacant units are somewhat run down. The centre provides a relatively safe shopping environment due to large pedestrianised areas.
- 5.46 The majority of respondents to the household survey considered the quality of the environment to

be either good (35%) or average (40%), only 12% considered the environment to be of poor quality. Only a small percentage (1%) of respondents quoted a better environment as being a reason to encourage more frequent visits to the town centre.

### ***Conclusions on Vitality and Viability***

5.47 Having regard to the range of vitality and viability indicators set out in PPS6, Kidderminster appears to be relatively healthy although there are clearly some areas of weakness. In summary:

- The traditional town centre shopping area has witnessed a growth in vacancies in recent years, partly as a result of the relocation of a number of retailers to the Weavers Wharf development. Many of the key vacant units in their current format are unlikely to be attractive to national multiple retailers seeking representation in Kidderminster;
- The business survey indicates that many traders have been experiencing a downturn in fortune recently, with the Weavers Wharf development having a perceived negative impact on traders in the older parts of the town centre;
- The Town Centre has poor representation from the top 20 retailers when compared to most competing centres. The business survey highlighted a desire to see a greater choice and range of shops in the town centre, with improvements to the environmental quality. However, given its size and status in the retail hierarchy, the range and choice of shops is generally considered to be satisfactory;
- Kidderminster has maintained its position in terms of commercial yields;
- The centre is accessible and displays relatively good levels of pedestrian footfall;
- The environmental quality of the older parts of the centre is fairly poor, especially when compared to the new Weavers Wharf development which provides floorspace much better configured to modern retailer requirements.

### **Stourport on Severn**

#### ***General Description***

5.48 Stourport on Severn is the second largest town in the district with a population of approximately 19,000 and is located to the south west of Kidderminster. It developed as a canal port in 1766

and has since become a popular tourist destination. The main retail and service outlets are located on either side of Bridge Street, High Street and Lombard Street. Additionally, there are units located on York Street and New Street which run perpendicular to the main shopping streets.

### Composition

5.49 There are a total of 130 retail units (including A2 and A3 uses) in Stourport Town Centre (adopting the classifications used by Goad), around half the number of Kidderminster. The breakdown of units within the centre is summarized in Figure 5.6 below. The summary also provides the average breakdown for all GB centres covered by Goad. A Goad plan for Stourport on Severn is contained at **Appendix E**.

**Figure 5.6: Retail Composition of Stourport on Severn Town Centre**

Retail Sector	No. of Units	%	No. of Units	%	GB Average %
	Feb 1999		May 2006		Oct 2005
Convenience	17	13	14	11	9
Comparison	54	42	56	43	47
Service	46	36	56	43	32
Vacant	10	8	4	3	10
Other	1	1	1	1	1
<b>Total</b>	<b>128</b>	<b>100</b>	<b>130</b>	<b>100</b>	

Source: Experian Goad Survey February 1999 (updated by White Young Green Planning in May 2006). Note: Figures may not add due to rounding

5.50 In summary, the above table demonstrates that between February 1999 and May 2006 the following changes have occurred:

- The number of convenience units has decreased by 3 units (2%), however, this is still above the GB average of 9%;
- The number of comparison units has increased by 2 units (1%). The comparison sector now accounts for 43% of all units, this is slightly below that GB average of 47%;
- The number of service units has increased by 10 (7%). Service units now account for 43% of all units, this is significantly above the GB average of 32%; and
- The vacancy rate has fallen significantly, from 8% of all units at 1999 to 3% currently.

5.51 The following table demonstrates the changes in floorspace composition of Stourport on Severn between 1999 and 2005.

**Figure 5.7: Floorspace Composition of Stourport on Severn Town Centre**

Retail Sector	Floorspace (000d's sq m gross)	%	Floorspace (000d's sq m gross)	%	GB Average %
	1999		2005		
Convenience	6.66	28.41	7.15	32.35	16.74
Comparison	9.40	40.10	9.10	41.18	52.78
Service	5.63	24.01	4.74	21.43	21.13
Vacant	1.27	5.43	1.02	4.62	8.15
Other	0.48	2.06	0.09	0.42	9.35
<b>Total</b>	<b>23.44</b>	<b>100</b>	<b>22.1</b>	<b>100</b>	<b>100</b>

Source: Experian Goad Survey 1999, updated in October 2005

Note: Figures may not add due to rounding

5.52 The above table demonstrates the following;

- There has been an overall reduction in the amount of commercial floorspace by around 1,000sqm over the period 1999 to 2005;
- Convenience floorspace has increased slightly (by 4%) between 1999 and 2005, notwithstanding that convenience shopping provision has fallen in terms of number of units;
- The comparison sector has remained fairly constant over the 6 year period and is significantly below the national average in terms of the proportion of total floorspace;
- The floorspace of the service sector has declined by approximately 1,000sqm (3% decline); and
- The level of floorspace occupied by vacant units has decreased slightly and is significantly below the nation average.

#### ***Retailer Representation and Requirements***

5.53 The town centre comprises mainly independent retailers. However, there are a small number of national multiple retailers located in Stourport including Boots, WH Smith, Threshers, Lloyds Chemist, Specsavers, Woolworths, Holland and Barrett and Savers. Despite the town's important tourist function, the comparison goods offer of the town centre is generally mainstream and focused towards meeting the everyday shopping needs of the local catchment rather than being geared towards specialist shopping.

Convenience shopping provision is made up of small supermarkets operated by Lidl, Tesco, and Co-op, these stores being mainly suited to basket shopping rather than main food shopping.

Additionally, a modest range of small, independent convenience retailers are represented, including butcher, newsagents, and greengrocers.

The household survey asked respondents how they rate Stourport Town Centre in terms of choice and quality of supermarkets and the range and choice of non-food shops. 24% of respondents consider the choice and quality of supermarkets in Stourport on Severn to be 'good', 45% consider it to be 'average' and 30% responded 'poor'. With regard to non-food shops 56% of respondents stated that the range and choice in Stourport on Severn is 'poor'; only 12% responded that it is 'good'. These responses raise issues about the quality of provision of both food and non food shops. 22% of respondents stated that an increased choice and range of shops would encourage more frequent visits to Stourport. The business survey findings are generally consistent with the household survey. Generally, while traders scored foodstore provision positively in the town centre, the choice and range of non-food shops was considered poor.

Responses to the visitors survey indicate that the majority of visitors consider the choice and quality of shops to be either 'about the same' or 'worse' than that of other competing centres. The results of the survey indicate that respondents chose to shop elsewhere due to other centres being nearer to home or because of access to a wider choice of shops. 60% of respondents however, consider the quality of the shopping environment in Stourport to be 'about the same' as other centres.

- 5.54 The Focus database of retailer requirements identifies only 6 retailers currently wishing to locate in the town (contained at **Appendix F**). These retailers are Aldi Stores Ltd, British Heart Foundation, Greggs, Extra Care Charitable Trust, Ethel Austin and McDonald's. This indicates that there is very limited interest from key national multiple retailers, which is unsurprising given the limited importance of the town as a shopping destination and its low standing in the shopping hierarchy.

### ***Diversity of Uses***

- 5.55 The centre accommodates a number of uses in addition to retailing. These include a number of tourist attractions (namely the Basins area), a leisure centre, an amusement centre (which includes fairground rides and bowling) and the Civic Hall. The town centre has a range of cafes, restaurants and take-aways (albeit mostly at the budget end of the market), reflective of its importance as a tourist destination. The on-street survey indicates that the main reasons for visiting the centre were food and grocery shopping (25% of respondents) and social/leisure activities (27%). Additionally, a number of events are held in Stourport on Severn throughout the year. Examples include a raft race, a regatta in May and a Carnival in September.

- 5.56 When asked about the choice and quality of service facilities, 40% of respondents (household shopping survey) stated that service facilities are 'good' and a further 36% said they are 'average'. Some 20% of respondents stated that service facilities in Stourport are 'poor'.

**Leisure Representation**

- 5.57 Leisure provision in Stourport on Severn Town Centre is somewhat limited. However, within the town, sports facilities are reasonably well provided for with a Council-owned leisure centre and private sports facilities at Stourport Manor. In the town centre itself, there is only an amusements centre which incorporates a bowling facility. The business survey highlights traders' concerns that a lack of leisure facilities impacts poorly on business at the town centre

**Vacancies**

**Figure 5.8: Vacancies in Stourport on Severn Town Centre**

	February 1999		May 2006		GB Average 2005
	No. of Units	%	No. of Units	%	%
<b>Vacancy Level</b>	10	8	4	3	10

Source: Experian Goad/ Updated (by WYGP) Land Use Survey in May 2006.

- 5.58 Figure 5.8 shows that the number of vacancies has decreased by 6 units since 1999 and now only accounts for 3% of all units, this is significantly below the GB average of 10%. None of these vacant units are located on the High Street. Two of these units are relatively large in comparison to the general size of units within the centre, the former Job centre unit is vacant, (a medium sized unit) and the final unit is fairly small.

While the lack of vacant units is a positive indicator in terms of the overall vitality and viability of the town centre, it does present a lack of opportunities for new retail businesses wishing to locate to the town due to a lack of available premises. While the Focus database suggests low levels of demand from national retailers, the poor availability of retail units may be restricting independents entry into the market.

**Commercial Yields**

- 5.59 The information provided in Figure 5.5 at Page 52 shows that Stourport on Severn maintained a reasonably stable position in the sub-regional shopping hierarchy between 2001-2005 in terms of

yield values. Recently, the centre has experienced a falling yield which suggests that Stourport on Severn has improved its attractiveness as an investment location.

### ***Pedestrian Flows***

- 5.60 The highest levels of pedestrian footfall were noted to be along High Street and also Lombard Street. In particular flows were high around the Co-op supermarket and the Tesco Metro store. Pedestrian flows were significantly lower on Bridge Street.

### ***Accessibility***

- 5.61 Stourport on Severn is accessible directly from Kidderminster via the A451. It is also fairly accessible from Bewdley and surrounding villages. There are a number of car parks serving the town centre. On-street parking is provided throughout the centre free of charge. The household survey indicates that the centre is considered to be relatively accessible by car with 38% stating accessibility is 'good', 27% 'average' and 27% 'poor'. However, 39% of those surveyed consider the adequacy of parking arrangements to be 'poor', while in the business survey traders also scored Stourport's parking provision poorly both in terms of location and quality of car parks along with pricing of car parks. 9% of respondents of the household survey stated that more parking would encourage more frequent visits to the centre. When actual visitors to the centre were surveyed, 66% of visitors accessed the centre by car. Of these, 90% reported no problem in obtaining a parking space, with the majority choosing to park at the Riverside car park on Bridge Street or at the Co-op.
- 5.62 Regular bus services connect the town with Kidderminster, Worcester, Bewdley, Lickhill and Burlish. Respondent's answers with regard to the accessibility of the centre by public transport are evenly distributed between good, average and poor. Just 2% of respondents stated that 'improved public transport' would encourage more frequent visits to the town centre. 31% of those interviewed as part of the visitors survey identified accessibility by public transport to be about the same as other centres. The majority of those interviewed as part of the household survey consider the ease of pedestrian movements within the area to be good (37%) or average (45%).

### ***Environmental Quality***

- 5.63 Stourport on Severn is an attractive centre. The centre contains a high proportion of historic buildings and the High Street was completely refurbished in 1998 with many original materials used in construction thus improving the general environmental quality. Wide pavements run throughout the centre providing a safe environment for pedestrians, however, the centre is marred

by high flows of traffic. However traffic congestion, which is frequent during the summer months, gives rise to noise and pollution that has a negative effect on the environmental quality of the town centre. The centre displays minimal levels of litter and graffiti and is generally well maintained.

- 5.64 The vast majority of respondents to the household survey stated that environmental quality of Stourport on Severn is 'good' (47%) or 'average' (42%). This is consistent with the findings from the survey of centre visitors.

### ***Conclusions on Vitality and Viability***

- 5.65 Stourport-on-Severn scores reasonably well in relation to most of the vitality and viability indicators set out in PPS6, notwithstanding its relatively minor role in meeting retail and leisure needs in the wider shopping hierarchy. The Centre's key strengths are:

- The high proportion of convenience retail units within the centre (although these have declined since 1999);
- A strong representation of service uses (reflecting the town's role as a tourist attraction within the sub-region);
- A very low (and falling since 1999) vacancy rates;
- Stable (and recently falling) commercial yields; and
- A reasonably attractive shopping environment (although somewhat marred in the summer months by high volumes of traffic).

- 5.66 The identified weaknesses include:

- The relatively poor range and choice of national multiple outlets;
- Car parking arrangements are considered (by centre users) to be poor;
- Limited demand for national multiple representation in the town.

## Bewdley

### *General Description*

5.67 Bewdley is the smallest of the towns within Wyre Forest District. It is an attractive, historic town focused around the historic bridge over the River Severn.

### *Diversity of Uses*

5.68 The majority of retail units are generally located along Load Street. In total there are 62 outlets in Bewdley Town Centre (adopting classifications used by Goad). The breakdown of units within the centre by different categories adopted by Goad is summarised in Figure 5.9 below. That summary also sets out the comparative average breakdown for all GB centres covered by Goad town centre plans and is helpful in understanding Bewdley's role as a shopping centre in comparison with other centres, and how that character has changed over time.

**Figure 5.9: Retail Composition of Bewdley Town Centre**

Retail Sector	No. of Units		%		UK Average %
	Nov 2000	May 2006	Nov 2000	May 2006	
Convenience	13	6	17	10	9
Comparison	35	24	47	39	47
Service	25	25	33	40	32
Vacant	2	7	3	11	10
Other	0	0	0	0	1
<b>Total</b>	<b>75</b>	<b>62</b>	<b>100</b>	<b>100</b>	<b>100</b>

Source: White Young Green Planning survey 2000 (updated in May 2006).

Note: Figures may not add due to rounding

The table above demonstrates that between November 2000 and May 2006:

- The number of convenience units has decreased by 7 units. The sector currently represents 10% of all units. This is slightly above the UK average of 9%;
- The number of comparison units in the centre has decreased by 9 units, the sector now represents 39% of all units. This is below the national average of 47%;
- The number of units in the service sector has remained constant at 25 units. However, given the decrease in the total number of units this sector now accounts for 40% of all units, which is above the national average of 32%.

**Retailer Representation and Requirements**

- 5.69 The town centre comprises predominantly of independent retailers. The only national multiples present in Bewdley are Dillon’s Newsagent, HSBC, Vantage Pharmacy, Portman Building Society, Barclays bank and the Co-op.
- 5.70 Just 10% of those interviewed as part of the household survey consider the choice and quality of supermarkets to be ‘good’, whilst 49% stated that the provision of supermarkets in Bewdley is poor. With regard to non food shopping provision just 12% of respondents stated that the range and choice of shops is ‘good’ whilst 47% consider it to be ‘poor’. An increased choice and range of shops would encourage 19% of respondents to the survey to visit the centre more frequently. With regard to service facilities available in Bewdley, 29% consider the choice and quality to be ‘good’, 34% ‘average’ and 20% ‘poor’.
- 5.71 The Focus database does not store information on Bewdley and therefore information is not available on retailer requirements. It is reasonable to assume that there will be very limited interest from national multiple retailers given the very localised shopping role of the town centre

**Leisure Representation**

- 5.72 Similarly to Stourport-on-Severn, leisure provision in Bewdley town centre is limited and consists mainly of pubs and restaurants. There is a Council owned leisure centre on the edge of the town.

**Vacancies**

**Figure 5.10: Vacancies in Bewdley Town Centre**

	November 2000		May 2006		UK Average 2005
	No. of Units	%	No. of Units	%	%
<b>Vacancy Level</b>	2	3	7	11	10

Source: Experian Goad/ Updated Land Use Survey

- 5.73 The above demonstrates that the number of vacant units in Bewdley has increased by 5 units. These units are dispersed throughout the centre and are generally small in size.

**Commercial Yields**

- 5.74 No information is available on commercial yields for Bewdley.

### ***Pedestrian Flows***

- 5.75 The centre displayed moderate levels of pedestrian footfall, in particular on Load Street around the bridge over the River Severn.

### ***Accessibility***

- 5.76 Bewdley is relatively accessible by car and by bus. However the historic street pattern and narrow roads can make the shopping area more difficult to navigate by car. Additionally, there is a one way system operating around St. Anne's church. Car parking is provided on Dog Lane to the rear of the stores on Load Street and there are also a number of on street spaces. Bus services link the centre with Kidderminster, Stourport, Lickhill and Burlish. The closest mainline rail services are located in Kidderminster.
- 5.77 In general the centre is considered to be accessible by car and on foot (54.4% replied 'good' to both questions), however, 42.2% consider car parking arrangements to be 'poor'. In respect of accessibility by public transport 25.6% of respondents replied 'good', 15.6% 'average' and 17.8% replied 'poor'. 61% of the respondents to the household survey consider the centre to provide for ease of pedestrian movements.

### ***Environmental Quality***

- 5.78 Given its riverside setting and historic nature, Bewdley is an attractive centre with a variety of building types and facades. The centre displayed very low levels of litter and there is no evidence of graffiti or vandalism. The majority of the units are well maintained.
- 5.79 The findings of the household survey support our on street assessment as 70% of respondents consider Bewdley's quality of environments to be 'good' with none of the respondents stating 'better environmental quality' as a first reason to encourage them to visit the centre more often.

### ***Conclusions on Vitality and Viability***

- 5.80 Bewdley is a small centre and there is, subsequently, a shortage of data available in respect of several of the vitality and viability indicators in PPS6. For those indicators which it has been possible to assess, it is concluded that the centre fairs reasonably well, on the whole, in the context of its limited role in the wider shopping hierarchy. The centre's key strengths are:
- A very attractive shopping environment, due to the historic nature of the town centre and its proximity to the River Severn;

- A relatively strong service sector provision.

5.81 The centre's identified weaknesses are:

- A reduction in the overall number of units within the centre between 2000 and 2006;
- A growing vacancy rate;
- The range and choice of both convenience and comparison retail outlets is perceived to be poor by centre users;
- Limited national multiple representation;
- The car parking arrangements are perceived to be poor.

### Local Centres

5.82 Wyre Forest District has 17 allocated Local Centres in the Wyre Forest Local Plan (Adopted January 2004). At **Appendix G** there is an assessment of each of the local centres, taking into account their retail representation, their parking facilities and their general indicative health, which is based on a qualitative assessment of environmental attraction and retail offer.

### Summary

5.83 In general the three centres in Wyre Forest District appear to be performing reasonably well with regard to most indicators of vitality and viability identified in PPS6. The level of vacancies in all of the centres is either comparable to the GB average, or, in the case of Stourport on Severn, significantly below it. Yields have remained stable over the past 5 years or so in Kidderminster and have recently fallen in Stourport. Pedestrian footfall is fairly high in all of the centres and all three appear to have reasonably high levels of environmental quality albeit that parts of the traditional town centre in Kidderminster are now looking a little 'tired' and fragile. The recent development of Weaver's Wharf in Kidderminster has improved the overall retail health of the centre and reinforced its status in the local retail hierarchy. However, this development has impacted on the traditional heart of the town centre to a degree by shifting the centre of retail gravity towards Weavers Wharf and through displacement of a major anchor store, Marks and Spencer. Moreover, the range and quality of the comparison shopping facilities within the town centre, taking into account Weavers Wharf, is not very strong and the lack of a quality department

store and general discount focus of many of the retail outlets, acts to limit the potential of the centre to broaden its attraction to a wider population catchment. This is largely a consequence of proximity and easy access to Merry Hill and Worcester both of which offer substantially greater shopping choice. It is noteworthy that Debenhams has a requirement for representation in Kidderminster and that currently there is little prospect of this happening given the type of available of retail units.

- 5.84 The potential of the town to meet its catchment population's overall retail needs, is considerably enhanced by the good range of retail warehouse outlets, most of which are located close to the town centre, at Crossley Retail Park and/or the B&Q warehouse at Green Street. Food retail provision in close proximity to the town centre is also strong with J Sainsbury's and Netto stores complementing the town centre foodstore (Tesco, Morrisons, Aldi and Iceland).
- 5.85 Stourport town centre continues to maintain a steady state in terms of its relatively local role in meeting shoppers needs, with the most noticeable change over time being a growth in the proportion of service provision.

## 6 CURRENT SHOPPING & LEISURE PATTERNS WITHIN THE STUDY AREA

### Description of Household Shoppers Survey

- 6.01 In order to gain a deeper understanding of convenience and comparison goods shopping patterns within the study area, a telephone based household shopping survey was carried out by NEMS market research. The objective of the household survey was to obtain an accurate picture of shopping patterns associated with the study area's population and to understand the core shopping catchments for the main towns in the study area.
- 6.02 In defining the survey area for this study, it was particularly important to consider the nature of convenience and comparison shopping trips. Trips made to foodstores are generally undertaken within a limited distance given the problems associated with the transport of frozen foods, and in light of numerous shoppers' surveys which generally show that convenience to home is the chief reason for regularly visiting a particular foodstore. Trips made for comparison goods on the other hand, often involve longer trips to access a broad range of products and to compare prices. Often the extent of a catchment area is determined by a combination of its current retail 'offer' and the proximity of other large centres. In the case of the Wyre Forest area, the proximity of Birmingham, Worcester, and Merry Hill, for example, is a key factor in this respect.
- 6.03 Additionally, regard was had to the previous household survey carried out for the 2001 Retail Study. In most cases, the survey zones have remained the same in order that any changes in shopping patterns for specific zones over the past five years can be easily identified.
- 6.04 The survey involved interviewing a weighted sample of 1,076 households within seven zones defined on the basis of postcode geography. Additionally, the results of a recent (February, 2006) household survey for Bridgnorth were also incorporated into the analysis, specifically a zone containing Bridgnorth and Highley. That zone corresponds with Zone 4 used in the 2001 Retail and Leisure Study for Wyre Forest. A plan showing the extent of the full survey area is contained at **Appendix H**. A copy of the questionnaire and survey results is contained at **Appendix I**. The following numbers of households were interviewed in each zone:

Zone	Main Town/Village	Postcode Sectors	2006 Population	Surveys
1	Kidderminster	DY10 1 to DY10 4 DY11 5 to DY11 7	65681	331
2	Stourport	DY13 8, DY13 9, DY13 0	21451	112
3	Bewdley	DY12 1 – DY12 3 DY14 8, DY14 9, DY14 0	19384	90
4	Bridgnorth	WV5 7, WV15 5, WV15 6 WV16 4 to WV16 6	26236	100
5	Stourbridge	DY7 5, DY7 6, DY8 2 DY8 3, DY9 9, DY9 0	43585	235
6	Bromsgrove	B60 1 to B60 4 B61 7 to B61 9, B61 0	23844	110
7	Droitwich	WR9 8, WR9 9, WR9 0	20455	99
8	Tenbury Wells	WR15 8, WR6 6	13733	99

### Shopping Patterns Relating to Convenience Goods

6.05 The 2001 retail study for the Wyre Forest area identified the following key food shopping patterns:

- Kidderminster has a very high (95%) convenience expenditure retention rate from Zone 1. Sainsbury's at Crossley Park is the most popular destination in this zone, with 45% market share;
- Residents located within Zone 3 (Bewdley and the rural area to the west) are heavily dependent on Kidderminster to meet their main food shopping needs. There is only an 8% expenditure retention rate in that zone. 44% of expenditure generated in this zone is directed to Sainsbury's at Crossley Park, and 39% to other stores in Kidderminster;
- Foodstores in Stourport account for 67% of the main food shopping trips made by residents within Zone 2. The Tesco and Co-op stores at Lombard Street are the most popular, having a combined market share of around 60%. Most of the expenditure leaking from the Stourport area is directed to the Sainsbury's at Crossley Park.

6.06 Table 4 at **Appendix J** summarises the survey derived patterns for convenience goods (main and top-up) shopping.

### ***Kidderminster***

- 6.07 For residents in **Zone 1 (Kidderminster)**, around 94% of main food shopping expenditure and 84% of top-up shopping expenditure is directed to stores in Kidderminster. Stores in the town also draw significant trade from **Zones 2 (Stourport) and 3 (Bewdley)**, with around 50% and 77% market share of main food shopping expenditure respectively. These three zones essentially represent the primary catchment area (PCA) of Kidderminster in respect of food shopping.
- 6.08 Stores in Kidderminster also attract good levels of main food shopping expenditure from **Zones 5 (Stourbridge - 38% market share) and 8 (Tenbury Wells - 28%)**, and to a lesser extent **4 (Bridgnorth - 14%)**, indicating that the town's secondary food catchment area (SCA) extends out in to rural areas mainly to the north and southwest of the town, but that there is limited penetration further to the east and south east.
- 6.09 The principal destinations in Kidderminster for main food shopping trips are the edge-of-centre Tesco at Castle Street, and the Sainsbury's at Crossley Park. These stores account for around two-thirds of expenditure generated in **Zone 1**. Around 18% of **Zone 1** main food shopping expenditure is directed to the edge-of-centre Morrisons.

### ***Stourport***

- 6.10 Main food shopping expenditure generated in **Zone 2 (Stourport)** is divided more or less evenly between stores in Stourport and Kidderminster. Foodstores in Stourport have evidently lost market share of locally generated expenditure over the past five years (from 67% to 49%). The Tesco at Castle Street, Kidderminster and Tesco and Co-op stores at Lombard Street are the most popular destinations for **Zone 2** residents, each having a market share of over 20%. A key reason for the decline of Stourport's market share of local main food expenditure appears to be the introduction of the Tesco store at Kidderminster, which is now the most popular destination for **Zone 2** residents.
- 6.11 As identified in the 2001 retail study, stores in Stourport do not attract any significant trade from outside **Zone 2**, indicating that the town has a very focussed primary catchment area for main food shopping, only likely to include the town's urban area and immediate rural surroundings to the south. This is due primarily to the good selection of main food shopping facilities located nearby in the Kidderminster urban area.

- 6.12 Stourport's market share of locally-generated top-up food shopping expenditure has increased significantly since 2001 (63% to 81%), the survey indicating that this is due to less top-up shopping expenditure being directed to stores in Kidderminster.

### ***Bewdley***

- 6.13 Bewdley attracts a very small proportion (2%) of locally-generated (**Zone 3**) main food shopping expenditure, but a reasonable retention rate for top-up shopping (46%). This is unsurprising given the size and nature of the convenience shopping offer in Bewdley.
- 6.14 The bulk of main food shopping expenditure generated in **Zone 3** continues to be directed to Kidderminster stores, although there has been a small drop in Kidderminster's market share from **Zone 3** over the past five years (83% to 77%). The remainder of main food shopping expenditure generated in **Zone 3** goes mainly to Stourport (6%) and Ludlow (7%), the latter likely to be drawing trade from the western half of the zone.

### ***Summary***

- 6.15 Overall it is apparent that there is a very high containment of main and top-up convenience shopping trips in the Wyre Forest District (**Zones 1, 2, and 3**). Ludlow has a tangible influence on food shopping patterns in **Zone 3** given its location close to the western end of the zone, but no other destination outside the district figures prominently in the market share data for **Zones 1 to 3**. This result is consistent with the findings of the 2001 household survey.
- 6.16 Kidderminster's food shopping PCA extends in to **Zones 2 and 3**. The town also draws trade from a wider area out towards Bridgnorth (**Zone 4**), Stourbridge (**Zone 5**), and the rural area southwest of Stourport, but the SCA has limited penetration in areas to the east and south east of the town (**Zones 6 and 7**).
- 6.17 Stourport's PCA overlaps with Kidderminster's, **Zone 2** expenditure being split more or less evenly between the two towns. Little expenditure is drawn to Stourport from other zones, indicating that the town has a very focussed food catchment area, extending little beyond the urban area and its immediate surroundings.
- 6.18 Bewdley attracts very little main food shopping expenditure, but plays an important role in servicing local top-up shopping needs.

## Shopping Patterns Relating to Bulky Comparison Goods

- 6.19 For the purposes of this study, “bulky” comparison goods are defined as those falling into three categories, as follows:
- Electrical goods - incorporating domestic appliances, radio, television and other durable goods (with the latter including musical instruments, photographic equipment, hi-fi equipment, video recorders and computers);
  - Furniture and carpets - with the latter category including other floor coverings such as vinyl and rugs; and
  - Do-it-yourself and hardware - with the latter category excluding china and glassware.
- 6.20 Whilst such goods are frequently sold in town centre stores, the general bulky comparison goods groupings are often used as a proxy for shopping patterns associated with retail warehousing, since many out-of-centre retail parks are subject to restrictive conditions which limit the range of goods that can be sold from the units to those falling within the above three categories.
- 6.21 In the shoppers’ survey, questions were asked about shopping habits relating to each of the above three categories of goods and the results are summarised below, derived from relevant tables in **Appendix K**.
- 6.22 The 2001 retail study for the Wyre Forest area identified the following shopping patterns associated with bulky comparison goods<sup>10</sup>:
- Electrical Goods: The district retains a reasonably good level (64%) of locally-generated expenditure (**Zones 1, 2, and 3**), but the attractiveness of Kidderminster (and Stourport and Bewdley) diminishes significantly in the surrounding zones, with Bridgnorth and Merry Hill being the important destinations for electrical goods shopping in **Zones 4 and 5**;
  - Furniture and Carpets: A 50% expenditure retention rate was recorded for the district’s Core Shopping Catchment Area (CSCA - **Zones 1, 2, and 3**), with nearly all of this expenditure being directed stores in Kidderminster. Kidderminster’s market share for **Zones 4 and 5** was significantly less, at under 20%;

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<sup>10</sup> Note: The 2001 Retail Study only looked at shopping patterns associated with bulky goods in Zones 1 to 5

- DIY: Around 73% of DIY expenditure generated in **Zones 1, 2, and 3** is retained, with the vast majority being directed to stores in Kidderminster.

#### ***Patterns of Shopping Relating to Electrical Goods***

- 6.23 Current shopping patterns relating to electrical goods are summarised in Table 7 at Appendix K.
- 6.24 Looking first at the district as a whole, the results of the household survey show that a high proportion (85% and over) of expenditure is retained in the CSCA, mainly being directed to out-of-centre facilities at Kidderminster. This represents a significant improvement in market share over the past five years (up roughly 20% across all three zones). It is also noteworthy that electrical retailers in the district have been able to improve their market share of expenditure generated in **Zones 4 and 5** over the same period.
- 6.25 The analysis shows that Kidderminster draws reasonable levels of electrical goods expenditure from **Zones 4, 5 and 6** (around 14-17% market share) and good levels from **Zone 8** (30% market share). The main competing centres in the sub-region are identified as Merry Hill (9% market share across all eight zones), Worcester (9%), and Droitwich (6%). Most electrical goods expenditure is directed to Kidderminster's out-of-centre facilities, with the Comet and Curry's stores at Crossley Park being the most popular destinations.
- 6.26 The survey results suggest that Stourport is not an important destination for electrical goods shopping. Only around 5% of expenditure generated in the town and surrounding rural area (**Zone 2**) is retained within the town, with significant leakage to nearby Kidderminster and the Wash House (Wilden). The Wash House is the second most popular destination for electrical goods shopping in the survey area (after Crossley Park), with a 9% market share. The very low level of expenditure retention in Stourport can be attributed to the lack of key national electrical goods retailers and limited selection of independent electrical goods retailers. The survey suggests that Bewdley does not attract any electrical goods expenditure.

#### ***Patterns of Shopping Relating to Furniture and Floor Coverings***

- 6.27 Shopping patterns relating to furniture and floor coverings are illustrated at Table 9 of Appendix K. It can be seen that shopping patterns relating to this category are similar to those for electrical goods.
- 6.28 The district has a high expenditure retention rate for the CSCA, at around 77% for **Zones 1, 2, and 3**. This is not surprising given the importance of the local carpet manufacturing trade and good provision of out-of-centre retail warehouse units in Kidderminster.

- 6.29 As with electrical goods retailing, this represents a significant improvement in market share over the past five years (an increase of roughly 25% across all three zones).
- 6.30 For the outer zones (**Zones 4 to 8**) the district as a whole has a good market share across all zones (ranging from 13% to 33%). The main competing centres in the sub-region are again identified as Merry Hill (6% market share across all eight zones), Worcester (7%), and Droitwich (8%).
- 6.31 Only a small proportion of expenditure in the district is not directed to Kidderminster's out-of-centre facilities. Kidderminster Carpets and Carters (both at New Road) are the most popular destinations. Stourport and Bewdley are identified as being insignificant destinations for furniture and floor coverings shopping.

#### ***Patterns of Shopping Relating to DIY and Hardware***

- 6.32 Shopping patterns relating to DIY expenditure are shown at Table 11 of Appendix K.
- 6.33 The key result from the survey is that the expenditure retention rate for the CSCA is very high, at over 95%, and that the vast majority of DIY shopping trips are carried out at out-of-centre stores in Kidderminster. Again, this highlights the district's improving market share over the past five years and also the good range of DIY retail warehouses in the Kidderminster urban area. This is largely accounted for by the provision of a B&Q Warehouse in 2003 which is by far the most popular DIY shopping destination in the survey area, and is characteristic of the nature of DIY trips generally.
- 6.34 In the wider survey area, trade is drawn principally from **Zones 4, 5, and 8** (similar to the patterns observed for the other bulky goods categories). The good levels of trade drawn from the wider survey area is mainly as a result of the attractiveness of the B&Q Warehouse.
- 6.35 Stourport achieves a reasonable market share (20%) in **Zone 2**, mainly owing to Wigleys DIY. Bewdley attracts a very modest amount of DIY expenditure since it has a small independent DIY/hardware store.

#### **Shopping Patterns for Non-Bulky Comparison Goods**

- 6.36 The questionnaire contained questions about shopping preferences relating to clothing and footwear shopping, for the purposes of this study taken as a proxy for 'non-bulky' comparison goods (consistent with the 2001 Retail Study). The clothes and footwear sector is generally accepted as the most reliable proxy for typical "high street" goods sold in higher order shopping

centres. The questionnaire sought responses to both primary and secondary choice shopping destinations for such goods.

- 6.37 It should be noted that this approach is likely to downplay, to some extent, the importance of smaller shopping centres, since other everyday comparison goods (eg. books, toiletries, jewellery, toys and gifts) are more likely to be purchased at lower order centres than clothing and footwear items, since access to a range and choice of retail outlets is of less importance to the shopper.
- 6.38 The 2001 retail study for the Wyre Forest area identified the following shopping patterns associated with non-bulky comparison goods (clothing and footwear):
- A 44% expenditure retention rate for the CSCA, with Kidderminster taking the lions share of expenditure;
  - Expenditure leakage mainly to Merry Hill (26% market share), Worcester (20%), and Birmingham City Centre (4%);
  - Limited expenditure attracted to Kidderminster from **Zones 4, 5 and 8** (11%, 4% and 10% market share respectively) and insignificant draw from **Zones 6 and 7**; and
  - Stourport and Bewdley attract very little clothing and footwear expenditure.
- 6.39 The results of the survey in respect of non-bulky comparison goods are summarised below and relate to Table 5 at Appendix K.
- 6.40 The key finding is that the expenditure retention rate in the CSCA has improved significantly in the last five years, with market share now in the range of 60% to 70% for **Zones 1, 2, and 3**. Kidderminster remains the key recipient of expenditure, with Stourport improving slightly it's market share of locally generated expenditure (now 7% for **Zone 2** compared with 4% in 2001). Bewdley still attracts only a very small amount of clothing and footwear expenditure.
- 6.41 Looking at the surrounding survey area, Kidderminster has also improved its market share across all zones. In **Zone 8**, market share has increased from 10% to 35%, and in **Zone 5**, market share has risen to 15%. The improvement in market share is also identifiable in the results relating to respondents second- and third-choice shopping destinations.

- 6.42 Generally, the importance of Merry Hill and Worcester as Kidderminster's main competing clothing and footwear shopping destinations in the study area is confirmed by the survey results, although leakage rates to these centres from the CSCA have fallen in the past five years, more noticeably in respect of Merry Hill. Given the important regional shopping role assumed by these two competing centres, there is unlikely to be scope to further claw-back locally generated expenditure on clothing and footwear by improving the range and choice of facilities in Kidderminster.

### **Overall Summary of Comparison Shopping Patterns**

- 6.43 The shopping patterns demonstrate that the district's Core Shopping Catchment Area (essentially Kidderminster's Primary Catchment Area) remains focussed on **Zones 1, 2, and 3**, with some penetration into surrounding zones, mainly **Zones 4, 5, and 8**. The extent of Kidderminster's influence on shopping patterns is curtailed to the south (**Zone 7**) by the regional centre of Worcester, which is especially noticeable in respect of clothing and footwear shopping. Similarly, Merry Hill, to the north, limits the town's influence much beyond its rural hinterland (**Zones 4 and 5**). To the east (**Zone 6**), Bromsgrove competes with Kidderminster in all shopping sectors, and the presence of the M5 corridor, creating good links with Worcester and the greater Birmingham urban area, also limits Kidderminster's importance in this zone.
- 6.44 In respect of bulky goods shopping, Kidderminster's out-of-centre retail warehousing facilities take the lion's share of expenditure attracted to the town (and district generally). The presence of a B&Q Warehouse means that good levels of expenditure are attracted from a wide area. The importance of the local carpet manufacturing industry, and correspondingly high provision of carpet retailers, means that the town attracts good levels of such expenditure across the whole of the survey area. Stourport is not an important bulky goods shopping destination, other than in respect of local DIY shopping trips. For electrical goods shopping, the Wash House at Wilden is an important destination in the CSCA, second to Crossley Retail Park.

### **Potential Influences on Future Shopping Patterns**

- 6.45 As part of this study we have considered how shopping patterns in the CSCA may alter as a result of any major planned or committed retail development in the surrounding competing town centres. Principally, this has informed our views on the potential for Kidderminster to retain or increase its market share of future expenditure generated in the survey area.

### ***RSS Revision Phase 1 (Black Country Study)***

- 6.46 In section 4 we referred to the Draft Phase One Revisions to the RSS relating to the Black

Country which are currently progressing. A key proposal in those Revisions is to elevate the status of Merry Hill/Brierley Hill to a strategic centre in the retail hierarchy and to accommodate substantial quantities of new retail floorspace at that location, in the period to 2021. Over the period to 2016 it is proposed to limit the extent of new comparison retail floorspace at Merry Hill to 36,000 sqm gfa and to make that development contingent on meeting a number of conditions beforehand, the effect of which is likely to delay any major planning permissions for retail use until after 2011.

6.47 However, in view of the likelihood that (subject to the approval by the Secretary of State to the Revisions in due course) such a large increase in retail floorspace at Merry Hill will be accompanied by a considerable improvement in the quality and range of shopping provided there, for example through the likely development of a major department store. There is, therefore, potential for comparison shopping patterns within the Wyre Forest catchment area to change in the post 2011 period, resulting in greater levels of comparison goods expenditure leakage to Merry Hill. This would reverse the apparent achievement (evidenced by household shopping surveys) between this and the last Wyre Forest Retail Study of a clawback of locally generated comparison shopping expenditure from Merry Hill to Kidderminster town centre, largely as a result of the Weavers Wharf development.

6.48 The effect of the Merry Hill expansion on Kidderminster's market share of comparison goods expenditure may not be that significant if the town is able to attract a major department store (eg Debenhams) in the interim. Given the medium/long-term threat posed by the Merry Hill expansion, we consider that gaining representation from a key department store should be a main priority for Kidderminster Town Centre, and the Council should consider the means in which it can pro-actively assist in achieving this objective.

### ***Current Development proposals***

6.49 Regarding the other main centres in the sub-region, the only specific current proposal that has the potential to materially influence shopping patterns in the Wyre Forest District is the proposed expansion of Wolverhampton's retail core. The council has selected a development partner for the mixed-use redevelopment of a 3.2ha site at the southern end of the City Centre. The proposals include around 50,000sqm of new retail and leisure floorspace (roughly equivalent to the total shopping floorspace in Kidderminster Town Centre), comprising a new department store of around 10,000sqm, three additional anchor stores, five mid-sized units, a further 81 small retail units, a multiplex cinema, and range of cafes/bars/restaurants. The development is scheduled to open in 2010, meaning that Wolverhampton may become an important competing centre over the next decade, notwithstanding the fact that the city currently has limited influence on non-food shopping patterns in the district.

- 6.50 We are also aware of the current proposal for a new Asda store in Lowesmore, Worcester and proposals for a new Tesco store in Stourbridge centre. However, these are unlikely to have any material affect on food shopping patterns in the district.

### **Commercial Leisure Patterns**

- 6.51 The survey questionnaire contained at **Appendix L** contains a series of questions relating to respondents preferences in respect of the following leisure activities:

- Cinema;
- Ten-pin Bowling;
- Health and Fitness clubs;
- Restaurants;
- Pubs and Clubs;
- General Entertainment.

- 6.52 The results of the survey in respect of each leisure pursuit is summarised below, based on the tables at Appendix L.

### ***Patterns Relating to Cinema Facilities***

- 6.53 Patterns of market share in respect of trips to the cinema are set out at Table 2. The household survey provided the following information regarding cinemas;

- 44.4% of residents in the District have not visited the cinema in the last twelve months. This is a higher level of non-visitation than the national average (30%) published by Mintel;
- There is only one cinema in the District, the Warehouse cinema in Kidderminster, this attracts 24.6% of first choice cinema visits. This facility is most popular with residents in Zone 1 (57.8%), Zone 2 (43.8%) and Zone 3 (40%) than with residents of other zones;
- Other cinemas attracting residents in the District are the UCI at Merryhill (25.6%), UGC at Rubery (19.9%) and Vue in Worcester (13%).

***Patterns Relating to Ten-pin Bowling***

6.54 Patterns of market share in respect of trips made to ten pin bowling alleys are summarised at Table 3. The household survey provided the following information regarding Ten-pin bowling:

- 71.7% of residents in the District have not visited a bowling alley in the last twelve months. This figure is comparable to the national average (72%) published by Mintel.
- The only bowling facilities in the District are provided at Shipley's Amusements in Stourport-on-Severn. This facility attracts 6.9% of first choice bowling trips. This facility is most popular within residents of Zone 2 (28.6%).
- Three ten-pin bowling facilities dominate this sector. These are the Hollywood Bowl in Rubery (22%), Worcester Ten-pin Bowling (20.1%) and the GX Superbowl at Brierley Hill (16.4%). None of these facilities are located within the District.

***Patterns Relating to Pubs and Clubs***

6.55 The household survey provided the following information regarding trips made to pubs and clubs:

- 31.9% of all residents in the District do not partake in this activity;
- Kidderminster is the preferred destination for visits to pubs and clubs, attracting 16.3% of all respondents. Stourbridge attracts 6.7%, Worcester 5.9% and Bewdley 5.9%. A further 5.4% travel to Birmingham;
- Residents in Zone 6 are most likely to travel to Birmingham (14.5%), those in Zone 1 (42.3%) to Kidderminster, Zone 2 (28.6%) to Stourport on Severn and Zone 5 (27.7%) to Stourbridge.

***Patterns Relating to General Entertainment***

6.56 The household survey provided the following information regarding trips made for general entertainment:

- 33.2% of residents in the District do not partake in this activity;

- Just 13.3% of all respondents use Kidderminster for 'entertainment' (i.e theatre/concert venues) whilst 23% travel to Birmingham to partake in such activities, this is likely to be due to the significantly wider choice and quality of facilities available in Birmingham.

#### ***Patterns Relating to Restaurants***

6.57 The household survey provided the following information regarding trips made to restaurants:

- 18.1% of all respondents do not visit restaurants;
- Of those who do use restaurants, Kidderminster attracts the largest share of residents in the District (19.1%). Other centres attract significantly less people - Bewdley (7.7%), Birmingham (8.2%) and Worcester (7.5%).

#### ***Patterns Relating to Sport and Fitness***

6.58 Patterns of market share in respect of trips made to health and fitness clubs are summarised at Table 4. The household survey provided the following information regarding health and fitness clubs:

- 53.6% of residents in the District do not partake/visit sports and fitness facilities;
- The centres in and surrounding the District attract fairly even shares of visitors for sport and fitness, with all figures being below 5%, except in relation to Kidderminster which accounts for 14.9% of all visits.

#### **Overall Summary of Leisure Patterns in Wyre Forest District**

6.59 Overall, residents of the District identified the most popular leisure pursuits as eating out (81.9%), pubs and clubs (68.1%) and entertainment (66.8%). Only just over half of all residents (55.6%) have visited the cinema in the last twelve months.

6.60 For a number of leisure pursuits surveyed, leisure destinations outside of the District are more attractive to residents than those located within the District. Only the Pubs and Clubs, Restaurants and Sports and Fitness centres within the district succeed in attracting a significant proportion of local resident custom.

### **Potential Influences on Future Commercial Leisure Patterns**

- 6.61 The potential designation of Brierley Hill/Merry Hill as a regional centre, as proposed in the Draft Phase 1 Revisions to the RSS, will undoubtedly bring with it the threat of improved leisure facilities at that location in tandem with the proposed major retail floorspace provision. This is likely to exacerbate the already high levels of expenditure leakage on leisure activities at Merry Hill, by residents of Wyre Forest. However, should Kidderminster be successful in attracting a multiplex cinema to the town this would act as a counterbalance to those trends and would also act as a localised catalyst to attract the type of chain restaurant facilities that frequently link with such cinemas.

### **Results of On Street Surveys within Kidderminster and Stourport on Severn Town Centres**

- 6.62 In order to understand more about the use of Kidderminster and Stourport on Severn Town Centres and perceptions of good and bad points associated with those centres, a survey of visitors to those town centres was carried out by NEMS market research. A total of 301 on street surveys were carried out using the questionnaire attached in Appendix D. The results of that assessment are summarised as Appendix D.
- 6.63 The key finding arising from the Kidderminster town centre on street surveys can be summarised as follows:
- The private car was the most popular mode of transport used to access the centre and more people arrived at the centre on foot than by bus.
  - The main reason for visiting the centre given by the largest number of responders was for food shopping although a substantial proportion of visitors were drawn for work/school/college reasons suggesting the centre is also focus for work/learning related activities.
  - Although a substantial number of respondents indicated that they last shopped in Kidderminster town centre for clothes and footwear, the frequency of visits for such purchases in the town centre was relatively low.
  - Despite the introduction of the Weavers Wharf development over half of the respondents indicated that they had not increased the frequency of their visits to Kidderminster town centre.
  - In respect of leisure pursuits, the key activities identified for visiting the centre were visits to pubs, clubs and bars. However visits for such purposes were not particularly frequent. Most respondents who indicated that they visit pubs/bars and clubs, visit facilities outside Kidderminster town centre.

- In response to questions regarding the relative qualities of Kidderminster town centre, the most popular response for most aspects was that the centre is much the same as any other centre. The strongest attributes of the centre are considered to be the quality of shops, range of services, the shopping environment and daytime safety. The centre's worst aspects were considered to be choice and range of pubs/restaurants, car parking provision and car parking prices.

### **Results for Stourport Town Centre**

6.84 Turning to Stourport, the key results arising from the on street surveys are as follows:

- The majority of visitors interviewed were car borne although around one fifth access the centre on foot.
- The most popular reasons for visiting the centre were for food and grocery shopping and social/leisure activities. Of those carrying out shopping for food, the majority indicated that they visited the centre more than once a week to carry out such purchases.
- The vast majority of those interviewed did not intend to buy clothing and footwear in the centre and most visited other centres, principally Kidderminster, to meet those requirements. The frequency of visits to Stourport town centre for clothing and footwear is relatively low.
- In respect of sports and leisure activities, of the (small) proportion of those visitors who partake in sport and leisure activities, the majority go to locations outside Stourport to meet their needs.
- Stourport town centre was rated to be either about the same or worse than other centres, across a range of factors. The centre rates particularly poorly in terms of the choice of shops, range and choice of pubs/restaurants, shopping environment and entertainment/events/performances. There was no single feature of the centre which was identified as being better or much better than other centres.

### **Town Centre Business Survey**

6.65 A survey of local business in Kidderminster and Stourport town centres was carried out as part of the study to provide information on the profile of businesses within each town centre, an indication of where the businesses drew their custom from, perceptions of business performance and to ascertain what measures, if any, could enable the businesses to be more effective. The results of the survey, together with a copy of the questionnaire, are included at **Appendix M**.

6.66 The following findings of the survey are noteworthy:

- A high proportion of the businesses who responded in Stourport town centre class themselves as local independents (74%) compared to Kidderminster (54%).
- A relatively high number of respondents in Stourport town centre indicated that they had been trading in the town for over 20 years. In contrast, some 20% of businesses in Kidderminster stated that they had been trading for under 5 years. These findings suggest a higher rate of business start ups and closures in Kidderminster compared to Stourport.
- In terms of perceived growth in business, some 30% of the Kidderminster respondents stated that their business had declined significantly over the last 12 months, compared to 25% who responded that their business had grown 'moderately'. Taken in the longer term however, over a 6 year period, a higher number of respondents indicated that their business had grown moderately. This suggests that there is a perceived down turn in the fortunes of town centre businesses in recent times.
- In contrast, in Stourport, the majority of traders appear to have remained static or experienced some growth in their business over both the short and longer term periods.
- When asked their views on a number of factors which could have an impact on their business, respondents in Kidderminster indicated that the following were likely to have negative impacts:
  - High pricing of car parks
  - Lack of provision of corporate facilities
  - Lack of events (markets etc), and
  - Poor public toilet provision
- Those aspects of the centre which are seen to impact positively on business in Kidderminster town centre are foodstore provision, access to the town centre by public transport, quality of the pedestrian environment and security and personal safety.
- Turning to Stourport, the key aspects of the town centre which were considered to adversely affect businesses are:
  - Location and pricing of car parks,
  - The lack of provision of cultural facilities,
  - Lack of events (markets etc),
  - Poor public toilet provision,

- Poor personal safety,
  - Lack of provision of CCTV.
- 
- On a positive side, foodstore provision along with signage and access by public transport ranked highly as factors which positively affect businesses in Stourport on Severn town centre.
  - More businesses in Stourport than Kidderminster rely on tourist trade.
  - When asked what they felt constrained business performance in each town, the aspects where there is overlap, in terms of responses, are high rents/overheads, lack of footfall outside premises, inadequate customer car parking and poor quality of the shopping environment.
  - The key improvements which businesses in Kidderminster town centre sought are cheaper and more flexible car parking, with better marketing/promotion of the centre also considered important.
  - The key improvements sought by Stourport businesses are increased choice/range of shops and flexible/cheap car parking.
  - Some 56% of businesses in the town centre have no aspirations to alter their business in the next 5 years, compared to 58% of respondents in Stourport with no such plans. Only a small proportion of businesses in either town planned to extend their premises or relocate into larger premises.
  - A number of other issues were raised in respect of each centre as summarised at Appendix M.

## 7 THE NEED FOR ADDITIONAL CONVENIENCE FLOORSPACE

### Introduction

7.01 The study brief requires an assessment of need for additional retail floorspace for five-year periods extending to 2021. In view of historic fluctuations in per capita expenditure on convenience goods, it is unrealistic to predict with certainty floorspace needs beyond more than a five year period, and the longer-term projections outlined in this report should be used with caution and as a guide only. On this basis, and as advised in PPS6, it will be essential to carry out regular monitoring and updating of the needs assessment.

7.02 Identification of need is a prerequisite for seeking to allocate additional land to accommodate new retail development in the emerging Local Development Frameworks, using the sequential approach to site location. PPS6 states that in assessing the need and capacity for additional retail development, local planning authorities should place greater weight on quantitative considerations. However, full account should be taken of both quantitative and qualitative factors, and there may be instances where greater weight should be placed on qualitative considerations (e.g. if specific communities are denied access to a range of services or facilities). Accordingly, we have sought to identify the need for new convenience floorspace on this basis.

### Methodology for Assessing Quantitative Capacity

7.03 We have used the results of the household shoppers' surveys, combined with population and expenditure forecasting, to determine the expenditure capacity to support new convenience floorspace based on the three main settlements in the study area: Kidderminster, Stourport, and Bewdley, along with the remainder of the district (ie. the main villages and rural area). This is based on the market shares achieved by these locations across the whole study area (**Zones 1 to 8**).

7.04 We have also carried out an assessment of the overall capacity available to the district based on its Core Shopping Catchment Area (CSCA) only (**Zones 1, 2, and 3**). This will give a more conservative estimate of the expenditure available to support new convenience floorspace since it does not take into account the inflow of expenditure originating from the wider area.

7.05 To assess the quantitative capacity for convenience goods we have carried out the following steps:

- Calculation of the current (2006) population and expenditure available within the catchment

area and forecast future population and expenditure growth over the study period.

- Calculation of the turnover of stores and centres within the catchment area using the shopping patterns identified in the household shopping survey.
- Assess the capacity for new retail floorspace using a constant market share approach. This involves calculating growth in turnover on the basis that the existing floorspace maintains a constant market share of the available expenditure within the catchment area as a whole, then subtracting the increase in turnover from the current (2006) turnover held as a constant and taking into account the likely turnover of committed floorspace within the catchment area.
- The model is adjusted to take account of levels of under-trading or overtrading at the main food shopping destinations by comparing survey-derived turnovers to benchmark turnovers based on company average sales performances. The residual “available” expenditure is then divided by an appropriate average floorspace sales density to derive the “headroom” for further retail floorspace.

7.06 In the quantitative assessment we have used the following data sources and assumptions:

- All monetary values are given at 2003 prices.
- Population information has been derived from MapInfo TargetPro reports for each survey zone. These give locally derived population figures based on ONS published data (census). This is projected forward using MapInfo population projections up to 2016, and thereafter based on a basic continuation of growth trends in the absence of published projections.
- Market share of existing retail facilities are taken from the household shopping survey. “Don’t know”, “don’t do” and “varies” responses have been excluded.
- It is assumed that there will be a 0.5% per annum improvement in the turnover efficiency of existing floorspace.

7.07 Per capita expenditure has been derived from MapInfo TargetPro reports (which provide local expenditure data). Special forms of trading have been excluded at a rate of 1.6% per annum (MapInfo Brief 05/2). Expenditure is projected forward using MapInfo/OEF forecasts contained in Information Brief 05/2.

7.08 The projected growth rate for convenience goods adopted is 0.9%. This reflects the MapInfo/OEF forecast growth rate for the period 2004 -2016. We consider that this provides a suitable basis on which to plan for future convenience goods floorspace provision.

7.09 The tables referred to in this section of the report are contained at Appendix J.

### **Expenditure Capacity: Convenience Goods**

7.10 Table 1 provides population forecasts between the years 2006 and 2021 for each of the household shopping survey zones. Table 2 sets out per capita convenience goods expenditure by zone. Table 3 multiplies the forecast population by the forecast per capita convenience goods expenditure to provide an estimate of the change in total convenience goods expenditure available by zone to 2021.

7.11 Table 4 sets out shopping patterns relating to main food and top-up shopping and identifies market shares relating to centres and stores in the study area. The shopping patterns derived from the household survey are analysed fully in Section 6 of this report. Table 5 translates the market share into turnover using the figures on availability of convenience goods expenditure within each zone from Table 3 using appropriate expenditure splits between main and top-up shopping calculated using the results of the household shopping survey.

7.12 The above assessment would ordinarily reflect a current state of equilibrium in the survey area as it assumes that the turnover of convenience shopping facilities is equal to the expenditure generated. Clearly therefore, this would not take account of situations of either under-trading or overtrading in the study area.

7.13 Our own observations indicate that most stores in Kidderminster are performing at normal levels (i.e. there are no signs of significant overtrading or undertrading). The possible exception is the Sainsbury's at Crossley Park, which appears to be trading strongly based on observed levels of patronage. Similarly, stores in Stourport generally appear to be trading at normal levels, with the possible exception of the Tesco at Lombard Street which shows some evidence of overtrading. These observations are generally confirmed by the household survey results. Accordingly, account of the fact that the principal food shopping destinations in the district may be over-trading or under-trading, based on company average performances, has been factored into the capacity exercise. Table 6 shows the results of this balancing exercise.

- 7.14 The model essentially assumes that when stores are collectively under-trading, capacity arising from expenditure growth is firstly soaked up by these stores in order to bring these up to a benchmark trading position (based on company average trading performances). Any expenditure headroom thereafter is available to support new floorspace. In reality, this is not always a realistic proposition, since a company average trading level is just that, and there will always be stores that under-trade with little prospect of any marked improvement in their trading performance (eg. because of sub-optimal format or location). Nonetheless, it is an indication of the potential ability for existing facilities to meet, or part meet, any quantitative needs arising.
- 7.15 On the other hand, in a position where stores are collectively overtrading, the model assumes that there is latent demand for new floorspace; ie there is expenditure available if existing overtrading foodstores revert to usual company average trading conditions. In practice, this is again not always a realistic proposition, as retailers will undoubtedly respond to any significant downturn in turnover by adjusting their trading strategies. However, retailers will normally need to rectify significant overtrading resulting in uncomfortable shopping conditions through such measures as store refits and extensions which have the effect of reducing sales density.
- 7.16 It should be noted that household shopping survey responses usually inflate the popularity of the main foodstores in the area, with respondents often overlooking or underestimating their use of smaller stores for main food shopping on an infrequent basis, which may inflate calculated levels of overtrading at main foodstores.
- 7.17 Assuming that the convenience retailers within the study area are able to retain their current market share, which we consider is a wholly reasonable proposition at least over the next five years, Table 7 shows the resulting expenditure capacity to support new convenience retail floorspace over the study period, making allowance for over/under-trading. It should be noted that there are currently no commitments for new convenience floorspace in the district, notwithstanding that the local plan allocates a site for a new foodstore in Stourport (Carpets of Worth site). While that site is allocated, the relevant policy makes it clear that the appropriate size of any foodstore coming forward on that site will be determined according to the relevant retail policy 'tests' of need, sequential approach, and impact, in force at that time.

7.18 The results are shown in the tables below, the value in brackets showing the expenditure available after adjustment for overtrading/under-trading:

**Fig 7.1: Convenience Expenditure Capacity 2006-2021 (£m)**

	2006	2011	2016	2021
<b>Kidderminster</b>	0 (10.8)	4.0 (14.8)	9.0 (19.8)	14.4 (25.2)
<b>Stourport</b>	0 (6.9)	0.7 (7.6)	1.5 (8.4)	2.5 (9.3)
<b>Bewdley</b>	0	0.2	0.3	0.5
<b>Villages/Rural Area</b>	0	0.1	0.3	0.4
<b>TOTAL</b>	0 (17.7)	4.9 (22.6)	11.1 (28.8)	17.8 (35.5)

7.19 By applying an average sales density for new floorspace (based on average sales densities for the main foodstore operators in the UK), an indication of the likely net floorspace requirements over the period to 2021 can be given. Verdict<sup>11</sup> provides convenience goods sales densities for the UK's main operators. A representative range is in the order of £5,000 per sqm (Co-op, Iceland, Somerfield) to £14,000 per sqm (Asda, Tesco) (convenience floorspace only and including VAT). This is shown on the tables below (allow for adjustments for overtrading and undertrading).

**Fig 7.2: Convenience Floorspace Capacity 2006-2021 (at £5,000 per sqm)**

	2006	2011	2016	2021
<b>Kidderminster</b>	2,160	2,951	3,954	5,035
<b>Stourport</b>	1,376	1,511	1,682	1,866
<b>Bewdley</b>	0	30	69	110
<b>Villages/Rural Area</b>	0	24	55	88
<b>TOTAL</b>	3,535	4,516	5,759	7,098

**Fig 7.3: Convenience Floorspace Capacity 2006-2021 (at £14,000 per sqm)**

	2006	2011	2016	2021
<b>Kidderminster</b>	771	1,054	1,412	1,798
<b>Stourport</b>	491	540	601	666
<b>Bewdley</b>	0	11	25	39
<b>Villages/Rural Area</b>	0	9	20	31
<b>TOTAL</b>	1,263	1,613	2,057	2,535

<sup>11</sup> Verdict Grocery Retailers, 2006

7.20 The analysis shows that:

- **Kidderminster:** Recorded overtrading principally at the Sainsbury's (Crossley Park), leads to latent capacity for additional convenience goods floorspace. We estimate this to be in the order to 770-2,160 sqm net (depending on the assumed sales density of new floorspace). Over the next 5 years, floorspace capacity rises to up to 2,950 sqm net.
- **Stourport:** if allowance is made for the collective overtrading of Stourport's stores, there is latent expenditure capacity in the order of £6.9m, equivalent to an immediate need for 490-1,380sqm net floorspace. Thereafter, expenditure capacity is in the order of an additional £0.7m to 2011, and £1.5m to 2016, meaning that there is capacity for up to an additional 600-1,680sqm net floorspace over the next ten years.
- **Bewdley:** given the settlement's low market share, capacity resulting from expenditure growth is very small, at only £0.2m over the next five years, and £0.3m over the next ten years. At most, this equates to a need for an additional 70sqm net floorspace at 2016.
- **Villages/Rural Area:** the household survey results suggest that a small proportion of expenditure gets directed to convenience stores outside the three main settlements in the district. On the basis that these stores retain their current market share, a small proportion of expenditure growth will be directed to such facilities, in the order of £0.1m to 2011, and £0.3m to 2016, equivalent to a need for an additional 50sqm net floorspace over the next ten years.

7.21 The alternative analysis considers the district as a whole and only looks at the CSCA (Table 7). As indicated above, this will give a more conservative estimate of the expenditure available to support new convenience floorspace as no account is made for the inflow of expenditure from the wider survey area. On the basis of a continuation of the current market share of facilities in the CSCA (94%), and making no adjustment for overtrading/under-trading, expenditure capacity is in the order of £2.8m at 2011, rising to £6.7m by 2016. This equates to district-wide floorspace capacity of around 200-560sqm net over the next 5 years, and 480-1,340 over the next ten years.

#### **Qualitative Deficiencies in Convenience Goods Floorspace**

7.22 In respect of identifying any qualitative deficiencies, we have used the results of the household shopping survey to identify levels of expenditure leakage from different parts of the study area, as described fully in Section 5. We have also used relevant information derived from the health check audit of the various centres in the study area to assess the quality and range of retailing available to the population in different areas.

7.23 In broad terms, the survey results show that the district retains a high level of locally generated convenience expenditure, suggesting *prima facie* that there are no glaring deficiencies in provision. This is mainly owing to a good provision of large foodstores in Kidderminster, which attract a high proportion of main food shopping trips. Additionally, the smaller foodstores located in the urban areas account for a high proportion of top-up shopping trips. However, subsumed within that overall qualitative sufficiency in the CSCA, there are sub-areas of deficiency, the principal one being Stourport, for the reasons explained in detail below.

### ***Kidderminster***

7.24 The town is served by three main foodstores (Sainsbury's, Tesco, and Morrisons), two of which are located at the edge of the town centre. The new Tesco at Castle Street and Sainsbury's at Crossley Park are particularly suited to modern customer expectations, having extensive food and non-food offers and attractive shopping environments both stores both stores appear to be trading strongly. The Morrisons store has undergone an internal 'freshen-up' since the acquisition of this store from Safeway, which has improved the shopping environment for customers. The town also has a range of smaller foodstores orientated more towards the discount market, including an Aldi, Netto, and Co-op. Therefore, Kidderminster is considered to have a good range of food shopping facilities.

7.25 None of the main foodstores in Kidderminster exhibit significant conditions of overtrading, indicating that since the last retail study, the introduction of the Tesco at Castle Street has had the effect of eliminating such conditions in Kidderminster stores through competition for market share. However, there appear to be moderate conditions of overtrading at Sainsbury's (Crossley Park), which could be rectified by increased floorspace in Kidderminster.

7.26 The vast majority of the local centres in Kidderminster contain a small convenience store, and it is considered that the urban area has a good coverage of such facilities.

### ***Stourport***

7.27 Stourport's catchment area for food shopping overlaps with Kidderminster's, with locally-generated expenditure being split more or less evenly between the two towns. As identified in Section 5, little food expenditure is drawn to Stourport from other zones, indicating that the town has a very focussed food catchment area, extending little beyond the urban area and its immediate surroundings.

- 7.28 The Household Shopping Survey reveals that a high level of locally-generated expenditure within **Zone 2** is being spent at Kidderminster stores. This is due to a combination of the relatively small scale of foodstore provision in Stourport compared to that in Kidderminster and the consequent greater level of consumer choice available. The biggest store in Stourport at present, Co-op, Lombard Street (1,846sqm net) is not able to compete effectively for main food shopping expenditure with the Tesco and Sainsbury's stores in Kidderminster, which are significantly larger and carry a much greater choice of goods in a better shopping environment.
- 7.29 It is clear that residents in **Zone 2** increasingly look to Kidderminster to meet main food shopping needs, particularly since the opening of the Tesco store at Castle Street which is now the single most popular destination for main food shopping for residents in **Zone 2**. This suggests that the overall quality of existing convenience retail provision in Stourport falls short of the aspirations/expectations of **Zone 2's** residents and the result is the perpetuation (and potential growth) of unsustainable patterns of travel in meeting basic food needs.
- 7.30 Therefore, we conclude that there is a qualitative need for improved foodstore provision in Stourport which would enhance market share retention in **Zone 2**.
- 7.31 The scale of the convenience floorspace required to meet this qualitative need will require careful consideration. The extent of quantitative need arising from spending growth in **Zone 2** is itself relatively small. However, there is scope for additional convenience floorspace provision arising from the re-assignment of the assessed levels of over-trading in each of the foodstores in Stourport, notably in the Tesco store at Lombard Street. Also, there is potential for further floorspace capacity through the likely ability of a sufficiently large, modern new store in Stourport to be able to claw back a proportion of the expenditure on convenience goods currently being leaked from Stourport's convenience catchment area to stores in Kidderminster.
- 7.32 The local plan allocates a site for this purpose at Severn Road (Carpets of Worth site), as part of the proposed mixed-use redevelopment of this key central site.

### ***Bewdley***

- 7.33 Bewdley is not served by a large foodstore realistically capable of meeting main bulk food shopping needs. Accordingly, local residents need to look to the large foodstores at Kidderminster to carry out main food shopping. Whilst it may be desirable for Bewdley to have a foodstore suitable for main food shopping purposes, it is not considered that there is an overriding need for such a facility, given the settlement's limited role in the shopping hierarchy and reasonably good accessibility to Kidderminster stores. Furthermore, the historic nature of the town means that the prospects for introducing a large-format foodstore are very limited.

- 7.34 It is understood that the District Council has been working closely with key partners including Opportunity Bewdley (now Bewdley Development Trust), the Wyre Forest PCT, Advantage West Midlands and the County Council to explore the redevelopment potential of an area centred on the existing Load Street car park. In urban design terms this area has been earmarked for improvement in the adopted Design Quality SPG. The opportunities afforded by this site in terms of new community facilities i.e. medical centre and library, housing and possibly shops is likely to be subject to further investigation.

## 8 THE NEED FOR ADDITIONAL COMPARISON FLOORSPACE

### Introduction

- 8.01 This section of the report considers the need for additional comparison goods floorspace over the period to 2021. Again, we emphasise that it is unrealistic to predict with certainty floorspace needs beyond more than a five year period, and the longer-term projections outlined in this report should be used with extreme caution and be subjected to regular monitoring and updating.

### Methodology for Assessing Quantitative Capacity

- 8.02 The quantitative assessment of the capacity for additional comparison goods floorspace follows the same general methodology as that used for convenience goods, as set out in the preceding section of this report.
- 8.03 In considering what growth rate in spending on comparison good should be adopted for the purposes of this study, we have had regard to the advice of MapInfo/OEF<sup>12</sup>. MapInfo/OEF forecast the following average annual growth rates for comparison goods:

**2004-2006: 3.8%**

**2004-2011: 4.1%**

**2004-2016: 4.3%**

These forecasts are based partly on past trends, but also upon expected changes in other economic variables of interest.

- 8.04 There is generally no consensus as to which of the above projections is likely to be the most reliable for forecasting capacity in the medium and longer-term. Accordingly, for the purposes of this study we have tested on the basis of growth rates of 3.8% and 4.3% for the study period. Additionally, we test a higher growth rate of 5.15%, this being the mid point between MapInfo's long-term and medium-term past trends. We consider that these growth rates present a reasonable range for assessing likely capacity arising over the period to 2021.
- 8.05 The assessment takes into account the proportion of expenditure by special forms of trading (SFT)(e.g. internet shopping, mail order, and other non-store purchases). MapInfo estimates that the proportion of comparison goods expenditure taken up by SFT is currently in the order of 5.3%.

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<sup>12</sup> Information Brief 05/2

- 8.06 It is not possible to predict with any certainty how this proportion may change over the period of this study, especially the effects of increased internet shopping. The capacity exercise in the Regional Centres Study for the RSS<sup>13</sup> assumes a significant growth in SFT over the period to 2021, reaching 20% of expenditure at the end of this period.
- 8.07 For the purposes of this study, we have tested three scenarios: static SFT, SFT grows by 0.25% per annum, and SFT grows by 1.0% per annum. Taking the highest of our scenarios, SFT will reach just over 20% by 2021, meaning that this scenario is more or less consistent with the growth in SFT anticipated in the Regional Centres Study.
- 8.08 Taking into account the two key variables in the quantitative assessment, namely the per capita expenditure growth rate and the SFT growth rate, we test three different scenarios in order to present both a conservative and optimistic estimate of expenditure capacity, along with a scenario which we consider represents an appropriate basis on which to plan for future needs. The assumptions for the three scenarios are as follows:

**Conservative Estimate:** Per capita expenditure grows at 3.8% per annum (the lowest growth rate adopted) and SFT grows at 1% per annum (the highest growth rate adopted).

**Best Estimate:** Per capita expenditure grows at 4.3% per annum and SFT grows at 0.25% per annum.

**Optimistic Estimate:** Per capita expenditure grows at 5.15% per annum (the highest growth rate adopted) and SFT remains static (no growth).

The tables referred to in this section of the report are contained at Appendix K. These are for Scenario 2, representing what we consider to be the appropriate basis for planning for future needs in the district.

- 8.09 For the purposes of the capacity assessment, comparison goods are split into four separate sectors. These comprise the three categories that historically are categorised as 'bulky goods', as described in Paragraph 6.14 above, along with clothing/footwear which is used as a proxy for non-bulky comparison goods, as described in Paragraph 6.31. This is in order to present information relating to the pattern of spending in the study area for different types of goods, and enables us to use market shares for different sectors as a basis for calculating expenditure capacity. Whilst we

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<sup>13</sup> Roger Tym & Partners in association with King Sturge, March 2006

have estimated expenditure capacity in each of these comparison goods sectors separately, we note that PPS6 advises that capacity should be forecasted under the broad category of comparison goods only, and accordingly, the forecast capacity for each sector has been combined into a single total comparison goods capacity figure.

- 8.10 Having regard to the above, the information presented in the tables should not be used as a basis for assuming what surplus expenditure may be available for retail warehousing as opposed to new town centre floorspace, using the incorrect assumption that capacity arising from the traditional bulky goods sectors should generally be directed to retail warehousing. Clearly such assumptions would conflict with the thrust of retail planning policy and guidance outlined in PPS6.
- 8.11 As with our methodology for assessing convenience shopping capacity, the assessment is based on assessing comparison shopping needs in each of the three main settlements in the study area: Kidderminster, Stourport, and Bewdley. This should not be taken to mean that needs will not arise outside these main urban areas or that no new floorspace should be located beyond the main urban areas, since other small centres in the district do have limited comparison shopping roles. This approach is based on the assumption that any significant proposals coming forward for new comparison goods retail floorspace are highly likely to be located within the built-up areas of Kidderminster and Stourport, and to a lesser extent, Bewdley, consistent with the general strategy for locating new retail development. This is based on the market shares achieved by these locations across the whole study area (**Zones 1 to 8**).
- 8.12 Additionally, an assessment of the overall capacity available to the district based on its Core Shopping Catchment Area (CSCA) only (**Zones 1, 2, and 3**) is provided. Again, it should be noted that this will give a more conservative estimate of the expenditure available to support new floorspace since it does not take into account the inflow of expenditure originating from the wider area (this is especially relevant in respect of Kidderminster owing to the wider attraction of this shopping destination).
- 8.13 In the quantitative assessment we have used the following data sources and assumptions:
- All monetary values are given at 2003 prices;
  - Population information has been derived from MapInfo TargetPro reports for each survey zone. These give locally derived population figures based on ONS published data (census). This is projected forward using MapInfo population projections up to 2016, and thereafter based on a basic continuation of growth trends in the absence of published projections;

- Per capita expenditure has been derived from MapInfo TargetPro reports (which provide local expenditure data). Special forms of trading have been excluded at the rates identified in the MapInfo 2003 Retail Expenditure Explanatory Volume (see table footnotes for specific figures);
- Expenditure is projected forward using MapInfo/OEF forecasts/trends contained in Information Brief 05/2, as explained in paragraphs 8.03 and 8.04 above;
- Market share of existing retail facilities are taken from the household shopping survey. “Don’t know”, “don’t do” and “varies” responses have been excluded;
- It is assumed that there will be a 2.25% increase in the efficiency of existing and new floorspace over the period assessed. This is consistent with recent forecasts by Experian<sup>14</sup> which suggest increases in floorspace capacity based on past trends of 2.0 – 2.5%. It is also consistent with the rate adopted for the Regional Centres Study.

#### **Expenditure Capacity: Comparison Goods**

- 8.14 Table 1 provides population forecasts between the years 2006 and 2021 for each of the household shopping survey zones. Table 2 sets out per capita comparison goods expenditure by zone, as a total, and Table 3 divides this into the four categories outlined in paragraph 8.02 above. Table 4 multiplies the forecast population by the forecast per capita expenditure to provide an estimate of the growth in total comparison goods expenditure available by zone to 2021.
- 8.15 Tables 5 to 12 set out shopping patterns relating to the different goods categories, identifying market shares relating to locations in and outside the study area, calculated using the results of the household shopping survey. The market share information is converted into turnovers using the figures on availability of expenditure within each zone from Table 4.
- 8.16 Tables 13, 14, 15, and 16 then show that the resulting expenditure capacity to support new retail floorspace over the study period in Kidderminster, Stourport, and Bewdley respectively, along with the district as a whole (based on the CSCA area). This is set out for each of the four goods categories in turn.
- 8.17 This is then translated into a floorspace capacity figure by applying a reasonable average sales

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<sup>14</sup> Retail Planner Briefing note 3.0

density for new floorspace having regard to the relative strength of the location and its position in the retail hierarchy.

- 8.18 We consider that a constant market share approach is a suitable basis on which to plan for additional comparison goods floorspace over the next five years at least, given that there is unlikely to be any significant shift in shopping patterns in the sub region in the short-term (as considered in Section 5 of this study). In the medium- to long-term, it may be necessary to adopt a more cautious approach to capacity forecasting if there is to be any significant strengthening of the retail offer of competing centres. The converse may also be appropriate, especially if there is a likelihood that Kidderminster’s strength will improve relative to other centres.

***Kidderminster***

- 8.19 The following amounts of floorspace capacity (rounded to the nearest 100sqm) are identified for the Kidderminster urban area, based on the constant market share approach, and using a notional sales density of £5,000 per sqm (see Table 13):

**Fig : Floorspace Capacity in Kidderminster to 2021 (Constant Market Share)(sqm net)**

Floorspace Capacity	2011	2016	2021
Scenario 1	1,100	2,400	4,000
Scenario 2	4,900	11,400	20,300
Scenario 3	8,300	19,900	36,200

- 8.20 The analysis shows that there is modest floorspace capacity over the period to 2011, ranging from 1,100 to 8,300sqm net, but likely to be in the order 4,900sqm net. However, over the next 10 years, expenditure is potentially available to support a substantial amount of new comparison goods floorspace, estimated to be up to around 19,900sqm net. However, our best estimate is that capacity arising to 2016 is in the order of 11,400sqm net.
- 8.21 It should be noted that our best assessment of the need for additional floorspace over the period to 2021 (ie. our Scenario 2) is higher than that projected in the Regional Centres Study, which estimated this to be in the broad range 7,000-15,000sqm net floorspace. The principal reason for this is that we have assumed that SFT increases at a lower rate over the period to 2021 to that adopted in the Regional Centres Study. As we have identified in paragraph 8.06 above, it is not possible to predict with any certainty how SFT (particularly internet retailing) will grow and the longer-range projections may therefore be unreliable (as could be those in the Regional Centres Study). In this regard, it will be necessary to update the capacity projections at regular intervals, taking into account most recent trends/forecasts associated with SFT.

- 8.22 There are no current commitments for additional comparison goods floorspace in Kidderminster (that are of sufficient size to be material in the context of the projections).
- 8.23 Having regard to the existing pattern of spending on comparison goods in the survey area, we consider that there is unlikely to be potential for Kidderminster to increase its market share of comparison goods expenditure by any significant amount over the next five years (as identified in Section 5), especially as there are no immediate proposals or commitments for significant retail development in the town that would result in a step change in the quality of the town's retail offer and represent a marked increase in the town centre's competitiveness. There may be some minor improvement in Kidderminster's market share as Weavers Wharf beds in further, but this is unlikely to be material in the context of this analysis. We also consider that there are no significant threats to the town's competitiveness in the short term to 2011, which are likely to erode Kidderminster's market share. Accordingly, we have not tested alternative scenarios that adjust market share for the town, notwithstanding that adjustment may be necessary post 2011 to reflect any major retail development coming forward in Kidderminster or competing centres such as Merry Hill as part of an RSS-led strategy to designate that retail destination as a sub-regional centre, where new retail floorspace would be encouraged.

### **Stourport**

- 8.24 We consider that over the next five years at least, it is reasonable to plan for additional comparison goods floorspace in Stourport on the basis of the town retaining its current market share of expenditure generated in the survey area. The prospects of any meaningful increase in market share related to mainstream comparison goods shopping are limited by the proximity of Kidderminster, the principal non-food shopping destination in the area. The likelihood is that Stourport will continue to function as a limited non-food shopping destination principally focussed on meeting local everyday needs and niche shopping associated with tourism.
- 8.25 There are no current comparison retail commitments for the Stourport urban area.
- 8.26 The following amounts of floorspace capacity (rounded to the nearest 50sqm) are identified for the Stourport, based on the constant market share approach, and using a notional sales density of £4,000 per sq. m. (see Tables 15):

**Fig : Floorspace Capacity in Stourport to 2021 (Constant Market Share)(sqm net)**

Floorspace Capacity	2011	2016	2021
Scenario 1	50	100	150
Scenario 2	200	450	850
Scenario 3	350	850	1,500

8.27 The analysis shows very modest comparison goods capacity over the period to 2021, based on current market share value. Our best estimate (Scenario 2) indicates capacity of only around 450sqm net over the next ten years. However, the above projections do not take into account potential capacity arising from increased tourist spending (ie. expenditure originating from outside the survey area), which could be significant in the context of Stourport. On this basis, it may be appropriate to plan for a greater amount of new comparison goods floorspace over the next five years and beyond, especially if this is associated with wider regeneration objectives (eg. redevelopment on the eastern side of Bridge Street) and bolstering the town’s attractiveness as a tourist destination.

***Bewdley***

8.28 Given that Bewdley has a very limited comparison shopping role (and market share), very little capacity arises as a result of the additional expenditure likely to be directed to the centre as a result of local expenditure growth (see Table 16). Our best estimate is that capacity will only be around 60sqm net over the next ten years. As with Stourport, this is not to say that proposals for new non-food shopping facilities should not be supported on the basis of lack of expenditure capacity, given the town’s importance as a tourist destination and corresponding inflow of expenditure originating from beyond the survey area. In any event, the prospects for introducing significant new retail floorspace (food or non-food) are severely curtailed by the historic nature of the town.

***District Total (Based on CSCA)***

8.29 The alternative analysis considers the district as a whole and only looks at the CSCA. As indicated above, this will give a more conservative estimate of the expenditure available to support new floorspace as no account is made for the inflow of expenditure from the wider survey area.

8.30 The following amounts of floorspace capacity (rounded to the nearest 100sqm) are identified for the District, based on the constant market share approach, and using a notional sales density of £5,000 per sq m (see Tables 17):

**Fig : Floorspace Capacity in the District to 2021 (Constant Market Share)(sqm net)**

<b>Floorspace Capacity</b>	<b>2011</b>	<b>2016</b>	<b>2021</b>
<b>Scenario 1</b>	900	1900	2900
<b>Scenario 2</b>	3,800	8,900	15,600
<b>Scenario 3</b>	6,500	15,600	27,800

Our best estimate is that district-wide capacity over the period to 2011 is around 3,800sqm net  
By 2016 we anticipate that the floorspace capacity will have increased to around 8,900 sqm net.

## 9 THE NEED FOR FURTHER LEISURE FACILITIES

### Assessing Future Needs

- 9.01 The commercial leisure sector has undergone a significant change in the last decade. During the late 1980s there was considerable development activity in the leisure sector particularly health clubs, golf courses/driving ranges, sports clubs and leisure complexes. This activity was somewhat curtailed with the onset of the recession in the early 1990s, which prompted national leisure operators to take a more cautious approach to their activities.
- 9.02 However as outlined in Section 3 of this study, recent trends have indicated that there has been renewed growth for leisure activities during the late 1990s and at the start of the new century. This renewed growth has primarily focused on evening economy uses such as cafes, pubs and bars and private health clubs rather than large scale leisure/cinema complexes. Forecasts for increased leisure spend indicate that pressures for new facilities will materialise throughout the plan period, but that this is likely to be focused on small scale developments and the further expansion of the evening economy rather than for example new multiplex cinemas or family entertainment centres.
- 9.03 The quantitative capacity of an area to support new commercial leisure development is more difficult to assess with any certainty when compared to retail development. For the purposes of this report, we have sought to analyse the potential capacity to support additional commercial leisure facilities including cinemas, health and fitness clubs and ten-pin bowling facilities. However, the limitations of this analysis must recognise that innovation in the leisure industry can create new demand and therefore affect future trends considerably, and this cannot be modelled. In addition, the cinema industry in particular is very much 'product-led', insomuch as attendance is determined by the popularity of individual films rather than growth in anticipated expenditure by the local population.

### Methodology

- 9.04 In the light of the above, often the most accurate indicators of future 'need' are potential gaps in the market or the identification of excessive leakages from one location to another. Questions asked in the household survey sought to identify whether there are specific leakages of trips from the District in terms of the range of leisure activities set out above. The results of these questions were analysed fully in Section 4 and inform our analysis below.

### **Patterns of Leisure Activity in the District**

9.05 The results of the household survey show that overall the proportion of respondents participating in each specified leisure activity were as follows:

Cinema - 55.6%

Ten-Pin Bowling - 28.3%

Entertainment - 66.8%

Health & Fitness - 46.4%

Restaurant - 81.9%

Pubs/Clubs - 68.1%

9.06 Of the proportion of survey respondents who partake in leisure activities, there is a significant difference between the proportion of those activities undertaken either inside or outside the District. This in turn reflects the quantity and quality of the existing provision of leisure facilities both inside and outside the District. However, whilst this level may vary, what is common to each leisure pursuit surveyed is that participants in every case carry out the majority of their activities outside the District.

9.07 Looking at individual leisure pursuits, the household survey results indicate that a proportion of participants who use health and fitness facilities (46.4%), eat out at restaurants (81.9%) or who go to pubs and clubs (68.1%), are likely to do so outside Wyre Forest District. As there is only one cinema and one ten pin bowling facility in the district almost all trips in respect of these leisure categories is carried out outside the District. However, almost half of those who use sports and fitness facilities do this within the District.

### **The Need for Further Leisure Facilities**

9.08 Having establishing the population available to support each leisure pursuit in the District, we have utilised a series of 'Mintel' and 'Key Note' reports to assess the future capacity for additional cinema screens, ten-pin bowling alleys and health and fitness venues in the District. The following analysis identifies that there is capacity in the District to support a limited amount of additional leisure facilities, although caution needs to be exercised regarding actual demand for retail floorspace from the leisure industry. Currently, the Focus database shows that there are no leisure operators with floorspace requirements in the District, although we have been made aware of current interest from a cinema operator by the Council.

9.09 The following analysis considers two scenarios concerning the need for additional leisure

floorspace. The first scenario is based on current market shares and organic population growth in the study area. The second scenario considers a situation whereby the District is able to increase its market share of leisure activity retention in each specified leisure category. Having regard to the existing pattern of leisure trips in the survey area, we consider that there is potential for the District to increase its market share. As set out at Paragraph 7.07, most categories of major commercial leisure provision are under-represented in the District. Where provision exists in the health and fitness sector for example, the existing facilities are small scale, dated and in most cases is not provided by nationally recognised market leaders. If more modern, market leading facilities were located within the District, we feel that it would be realistic to expect the following market share uplifts in the following categories:

- Cinema - Trips to the cinema these days are widely recognised as more than simply viewing a film. Many modern multiplex cinemas offer the opportunity to engage in a range of eating, drinking or associated leisure opportunities (e.g. video gaming, pool and snooker etc). There is a trend towards cinemas becoming the hub of wider 'family entertainment centres'. The scale of any modern cinema development in Kidderminster will be circumscribed by the proximity of the geography of high quality competing facilities outside the District. However, we consider that a modest sized development to complement the existing cinema, could result in a market share uplift from 24.6% to around 75%.
- Ten-Pin Bowling - Unlike a modern cinema experience, the qualitative difference between one ten-pin bowling centre and another is less pronounced. Whilst efforts have been made in recent years to update many centres and to provide wider ranges of facilities, Mintel research shows that ten-pin bowling itself accounts for the vast majority of spending in ten-pin bowling centres. Therefore, we consider that a ten-pin bowling facility in the District would have a good chance of attracting a significant market share. We forecast that such a facility could result in an uplift of the District's market share of all ten-pin bowling trips from 6.9% to around 30%.
- Health & Fitness Clubs - As detailed in Section 3, the health and fitness club sector is one of the fastest growing leisure sectors. Rapid levels of growth have been achieved on the back of a significant increase in the number of participants combining trips to and from work, or at lunch times, with trips to these clubs. As a result of this, coupled with the fact that many people are reluctant to give up their time at the weekend (reducing the time/distance likely to be travelled to inset needs), we recognise that the core local employment centre (i.e. Kidderminster) will continue to be the main attractor of health and fitness trips. Therefore, we forecast that the provision of additional facilities in the District would result in an uplift of the District's market share of such tips from 46.5% to 60%.

9.10 In the light of the above, we summarise below the capacity for additional leisure facilities in each

sector under two scenarios; one adopting existing market shares. The second assumes increased market shares, justifying additional provision. The scale of new provision that the District can support, is examined.

- 9.11 The tables contained at Appendix L set out our statistical consideration of the need for additional leisure facilities in the District.

### ***Cinemas***

- 9.12 Table 5a calculates that the population available to support a cinema facility in the District at 2006 is around 130,000. However, as previously detailed, over 70% of these people currently travel outside the District to go to the cinema and based on current market share there is, therefore, no capacity for cinema screens in the District at present.

- 9.13 Under Scenario B (Table 5b) we consider a situation where 75% of market share might be attracted to a facility in the District. Based on projected per capita visitation rates and average cinema attendance figures taken from Mintel, this modelling exercise indicates that if market share was to increase along these lines there would be capacity to support 5 new cinema screens in the District over the period to 2026.

- 9.14 In the light of the above analysis, it is apparent that there is currently no capacity for further cinema facilities. If the market share were to increase to 75% there would be capacity for 5 new screens to 2026. Therefore, the only grounds for achieving capacity for a substantial new cinema facility in the District would be to increase market share significantly. However, this may not be a viable proposition, especially when it is convenient enough for residents to travel the relatively short distance to multiplex cinema facilities at Merry Hill. Any disadvantages that travelling these distances may present are likely to be more than made up for by the potential to carry out linked trips for other leisure or retail purpose at that major centre.

### ***Ten-Pin Bowling***

- 9.15 Table 6a shows that there are currently in the order of 66,000 residents who play ten-pin bowling in the survey area. Currently, almost 90% of these people play their ten-pin bowling games outside the District. However, on the basis that a new ten-pin bowling facility would increase the District's market share to 30%, then our analysis shows that there would be capacity to support approximately 4 lanes in the District.

- 9.16 Although an additional ten-pin bowling facility may increase the overall number of people participating in the activity, we consider that any potential growth through increased participation

is likely to be insufficient to support a ten-pin bowling facility owing to the market preference for schemes with at least 10 lanes. From a quantitative point of view, it is unlikely that there are enough ten-pin bowlers in the District to support a new facility. However, it could be argued that a new ten-pin bowling facility in the District, could offer a significantly improved qualitative experience when compared to nearby competitors and might, therefore, attract from beyond the District boundary.

### ***Health and Fitness Clubs***

- 9.17 At present, the District contains a number of health and fitness facilities. However, it is significant to note that the quality, type and scale of existing facilities is at the lower end of the market in terms of modern customer expectations from such facilities. Whilst the district benefits from a JJB health and fitness club and a Fitness First in Kidderminster and a Sebastian Coe health club in Bewdley, the remainder of provision is provided by small, independent health clubs and District Council sports centres.
- 9.18 As detailed in Section 2, Mintel forecast that the number of people in the adult population who visit health and fitness clubs is likely to follow current trends by increasing at a steady rate. However, our analysis at Table 7a incorporates the assumption that the average number of members per club is currently 1,611 and that this figure is set to remain constant until 2021. Mintel forecast that the number of members is expected to continue growing strongly, primarily driven by growth in the number of sites operated but also because of a renewed emphasis on customer service and health consciousness. Mintel also forecast that the average number of members per club is set to grow because most of the clubs opening up around the country are being built by multi-site operators such as Fitness First, and will have significant capacity. Also, as a result of heightened competition, the number of smaller independent clubs is decreasing.
- 9.19 On the above basis, Table 7a demonstrates that there is sufficient capacity within the District to support 7 average sized health and fitness clubs under the constant market share scenario. Our understanding is that while there are a number of health and fitness clubs currently in the District, few of these have a membership levels of around 1,600. This suggest that the level of assessed capacity marginally exceeds the scale of the current provision, meaning that existing providers are likely to be operating at, or in excess of, normal capacity. Hence there is scope for further health and fitness floorspace in the period to 2021 even based on current market shares being retained.
- 9.20 Under the increasing market share scenario (Table 7b), the capacity for health and fitness clubs increases further to 9 average sized clubs over the period to 2026.

9.21 Therefore, based on the existing provision within the District, our findings demonstrate that the current supply of facilities in the District does not meet demand, and that the provision of additional facilities can be justified in terms of increasing market share and reducing the need to travel. This conclusion is reached even assuming that 50% of health and fitness club users in the District will still visit facilities outside of the District even if a modern facility is located within it. In terms of location, the household survey indicated that Zones 5 – 8 had the lowest rates of trip retention in the District. This is likely to be due to their proximity to other, larger, competing centres. Retention is stronger in Zones 1, 2 and 3 due to the presence in those Zones of the leisure centres at Kidderminster, Stourport on Severn and Bewdley respectively.

### **Summary**

- 9.22 From the evidence gathered as part of the household survey, it would appear that the strength of provision of existing leisure facilities in the District varies significantly between different sectors. What is common to all sectors is that the majority of residents in the District find the travel distances to other leisure venues, primarily Merry Hill/Brierley Hill, Worcester, Stourbridge and Birmingham bearable and are likely to link their trips with other leisure pursuits, shopping or work. This conclusion is given further weight in that the Focus database shows no current leisure operator requirements in the District.
- 9.23 Over the period to 2021 we forecast capacity within the study area, but most likely in Kidderminster, for additional leisure facilities, particularly in respect of a cinema, a ten pin bowling facility and several health and fitness clubs.
- 9.24 As highlighted previously, it is almost impossible to accurately forecast the future need for pubs, restaurants and nightclubs although it is anticipated that there will be some demand focused in each of the three town centres.

## 10 RECOMMENDATIONS

### Introduction

- 10.01 In this section of the report we set out our recommendations for the main centres, specifically in order to guide the type, size, and location of future retail and leisure provision. This includes an overview of the needs identified in previous sections of this report, recommendations as to how this need could be accommodated, and additionally how specific parts of the town centres should be defined in order to protect the prevalent retail function, control development, and encourage appropriate investment.
- 10.02 Finally, we provide recommendations as to how the LPA can improve its monitoring framework in order to inform future policies and strategies for the district's main centres.

### Kidderminster

#### *Key Issues*

- 10.03 The key findings of our assessment in respect of Kidderminster are:
- A shift in the retail gravity towards the Weavers Wharf development, meaning that the health of traditional parts of the town centre is looking increasingly vulnerable;
  - Key large units in the town centre are vacant and they are not well-suited to modern retailer requirements. There is currently poor availability of modern, large, flexible retail units;
  - The Swan Centre has suffered from the loss of Waitrose and the shift in retail gravity. It is looking tired and dated;
  - The town centre lacks a quality department store. There is currently a requirement by Debenhams for representation in the town but currently little prospect of this occurring given the unavailability of suitably located and configured floorspace;
  - The expansion of Merry Hill could potentially affect Kidderminster's popularity as a shopping destination post 2011;
  - There is no qualitative need for further convenience goods floorspace in Kidderminster. Moderate conditions of overtrading at the Sainsbury's, Crossley Park, suggests some latent

demand for additional floorspace, and combined with expenditure growth, there is likely to be a requirement for around 1,000-3,000sqm net floorspace over the next five years (depending on the sales density of new floorspace) and up to a further 1,000sqm net over the period 2011- 2016. This need could be met through the expansion/replacement of existing stores (eg. the current proposal to provide a new edge-of-centre Morrisons store) or by a modest sized new town centre foodstore.

- There is a need for around 5,000sqm net additional comparison goods floorspace over the next five years, and around 11,000sqm net over the next ten years. This growth should be positively planned for to ensure that Kidderminster maintains and improves its attractiveness as a shopping destination, especially given the longer-term threat posed by the Merry Hill expansion.
- There is capacity for additional leisure facilities in Kidderminster, particularly in respect of a cinema, a ten pin bowling facility, and health and fitness clubs, but unproven operator demand.

10.04 Taking the above issues into consideration, we consider that the key aim of the retail strategy for Kidderminster over the next ten years should be to plan positively for a growth in comparison goods floorspace in the town centre area, ensuring that suitable opportunities are available for key national retailers that may be attracted to the town centre. The presence of a quality department store (such as Debenhams) is likely to have a major positive impact on the town centre, and we recommend a priority objective to seek to attract that type of retail provision to the centre.

10.05 We consider that there are two key opportunities for creating new retail floorspace suited to modern retailer requirements. These are now described in turn.

### ***Key Development opportunities***

#### Worcester Street / Oxford Street / Green Street

10.06 There is an opportunity to positively plan for the comprehensive mixed-use redevelopment of a large part of the town centre area, focussed on the southern ends of Worcester Street and Oxford Street, which are currently characterised by vacant land and buildings. Additionally, Morrisons is currently seeking to relocate their foodstore to the southern side of Green Street which, if approved, would potentially free up adjoining land for redevelopment. This general area is shown on the plan at **Appendix N**.

10.07 This part of the town centre immediately adjoins the town centre Primary Shopping Area and the

Glades Leisure Centre. Therefore, this area is suitable for the development of new retail and leisure floorspace focused towards meeting current deficiencies and future needs. There is scope to create a mixed-use development potentially anchored by a department store and/or cinema. The priority for this area should be to deliver a significant proportion of the identified need for new comparison goods floorspace arising over the next ten years (11,000sqm net floorspace), especially as there are no other readily identifiable opportunities for accommodating significant retail growth in, or immediately adjoining, the PSA. In any event, given that the retailing function of this part of the town centre is currently not that strong, it will be necessary to ensure that any scheme has a suitable critical mass of retail floorspace to ensure retailer interest, especially in order to attract a retailer such as Debenhams.

- 10.08 Major retail development in this area is likely to act as a counter to Weavers Wharf, re-shifting the retail gravity back towards the traditional town centre area, albeit the southern section. It could potentially leave the northern part of the town centre (ie. in and around the Swan Centre) exposed to further decline through dilution of its retailing function, particularly if existing retailers relocate to new units forming part of any redevelopment scheme. Accordingly, it is likely to also be necessary to plan positively for the reinvigoration of the northern sector, hand-in-hand with proposals for this area.
- 10.09 As this is the only clear opportunity for a major growth in retail floorspace, we consider that it is important that the Council/LPA facilitate the comprehensive redevelopment of this area. This should include positive planning policies for the site, backed-up by the production of supplementary planning guidance, and pro-active methods of land assembly if necessary.

#### Swan Shopping Centre

- 10.10 Redevelopment of the Swan Shopping Centre is the other key opportunity for enhancing the overall vitality and viability of the town centre, especially through the visual enhancement of this part of the town centre.
- 10.11 The Swan Centre could be redeveloped primarily for retailing, although there is limited prospect of significantly increasing net retail floorspace to contribute towards meeting needs arising over the next ten years. The focus should be on reconfiguring floorspace so that it is attractive to modern retailers, set within an attractive, high-quality building. Given the proximity of Weavers Wharf, we consider that such a scheme would likely be attractive to key national multiple retailers.
- 10.12 Alternatively, a mixture of uses could be proposed, including an element of housing.

- 10.13 The preferred mix of uses for any redevelopment scheme could well be influenced by what happens at the southern end of the town centre shopping area (as discussed above), since it would appear that this area is likely to come forward for redevelopment first. For example, if significant retail floorspace is introduced in the southern part of the town centre, this may affect the commercial viability of a retail-led redevelopment scheme for the Swan Centre, due to insufficient retailer demand (notwithstanding the comments above), in which case, alternative town centre uses may be more appropriate in terms of consolidating and strengthening this declining part of the town centre.

### ***Town Centre Definitions***

- 10.14 PPS6 states that Local Planning Authorities should define the extent of the Town Centre and its Primary Shopping Area (PSA). The PSA is the area where retail use is concentrated, generally comprising the primary retail frontage and contiguous areas of secondary frontage). The aim of defining a PSA is to assist LPA's and developers regarding the definition of "edge of centre" for the purposes of allocating land for retail development or assessing the locational status of a retail application. The definition of edge of centre in Annex A of PPS6 now relates directly to the PSA and this should help to overcome the difficulties of interpretation associated with the concept of edge of centre in PPG6. Paragraph 2.17 of PPS6 also allows LPA's to define the extent of primary and secondary retail frontages within the town centre and to distinguish between those two areas in policy terms, relating to permitted uses and changes of use. With this guidance in mind, we have undertaken a review of the town centre area on the basis of correctly defining its extent, and that of the PSA, along with the Primary and Secondary Frontages.
- 10.15 Our main observations relating to Kidderminster in this respect are as follows:
- The 'Town Centre', as currently defined, is the area located within the inner ring road and the canal. We consider that this is a logical definition with a clearly identifiable boundary, and therefore we do not recommend its amendment.
  - Weavers Wharf is established as Primary Frontage and should form part of the PSA;
  - Blackwell Street has a limited shopping function and should not be part of the PSA. However, it is reasonable to identify this part of the Town Centre as Secondary Frontage given its current diversity of uses.
  - The retailing function of the lower parts of Worcester Street and Oxford Street (southeast of the Prospect Hill/New Road axis) is minimal and this area should not be designated as part of the PSA. However, in the light of our recommendations for this part of the Town Centre, it will

be appropriate to identify this area as a proposed extension to the PSA, given that it is suitable for accommodating significant new retail floorspace.

- The retailing function of that part of New Street to the south of its junction with Market Street is minimal, and accordingly, this area should not form part of the PSA. This part of the Town Centre should continue to be designated as Secondary Frontage.
- The Tesco foodstore at Castle Road is not contiguous with the main shopping area and therefore it should not form part of the PSA.

10.16 Taking the above observations into account, the plan at **Appendix O** sets out our recommendations relating to the current extent of the PSA. We also identify the area which we consider should be designated as a proposed extension to the PSA in order to accommodate the planned growth in town centre comparison goods floorspace.

## **Stourport**

### ***Key Issues***

10.17 The key findings of our assessment in respect of Stourport are:

- Stourport Town Centre continues to maintain a steady state in terms of its relatively local role in meeting shoppers needs;
- There is evidence of very limited demand from national multiple retailers for representation in the town;
- The vacancy rate is very low which may be restricting independent retailers' entry into the market;
- There is significant convenience goods expenditure leakage to Kidderminster, brought about by the poor provision of main food shopping facilities in Stourport. This results in a clear qualitative need for a new main foodstore in the town.
- There is minimal expenditure capacity for additional comparison goods floorspace arising over the next ten years, based on a continuation of the town's current market share. However, there may be added scope for new floorspace arising from tourist spending.

- 10.18 On the basis of our assessment, we consider that the overriding strategy for Stourport Town Centre should be one of maintaining its localised shopping function, particularly given that there is limited scope for the town becoming an important mainstream shopping destination. In any event, there are limited physical opportunities for any significant growth in retail or leisure floorspace in the Town Centre that could as a consequence materially change the overall function of the town in the shopping hierarchy.
- 10.19 In satisfying local shopping needs, the most important objective is meeting the need for enhanced main food shopping facilities in the town. The Carpets of Worth site presents an opportunity for the development of a new foodstore of sufficient size to meet main food shopping requirements. While this site is, at best, edge-of-centre, and is not ideal in terms of its linkage with the PSA, there are no more centrally-located opportunities for delivering a new foodstore.
- 10.20 Given the limited need and demand for new mainstream comparison shopping floorspace, there is potential scope for the town centre to diversify in order to strengthen its offer for tourists. This could encompass more specialist forms of retailing, along with increased leisure facilities, especially focused in and around the canal basins area, and linking in to Bridge Street. While it is difficult to actively plan for such diversification (it will be dictated by the market), the retail strategy should not act as a barrier to appropriate changes of use in the town centre, including the areas of Primary Frontage.

### ***Town Centre Definitions***

- 10.21 On the basis of our observations, the plan at **Appendix P** sets out Mour recommendations relating to the current extent of the PSA and Primary and Secondary Frontages for Stourport.

### **Bewdley**

- 10.22 Bewdley Town Centre is focussed principally on meeting the day-to-day needs of its immediate shopping catchment. Additionally, the Town Centre's comparison offer is substantially geared to tourist shopping. The constraints relating to the historic morphology of the town centre, especially its physical capacity for growth, mean that there is limited scope for further retail or leisure development. In this respect, the current role and functions of the town centre are likely to continue for the foreseeable future.
- 10.23 Given that the town centre is in a healthy state, and taking into account the lack of identifiable needs or pressures for change/growth, we consider that the retail strategy for Bewdley should be to maintain the status quo.

- 10.24 The plan at **Appendix Q** sets out our recommendations relating to the extent of the Town Centre and PSA for Bewdley. Because of the limited size of Bewdley, we are recommending that the defined 'Town Centre' is more or less coterminous with the PSA, meaning that surrounding land in predominantly residential use is recommended to be taken out of the Town Centre area. This redefinition is consistent with the guidance outlined in PPS6.
- 10.25 We recommend that Primary and Secondary Frontage is not defined for Bewdley, given the limited size of the PSA. The policy approach to changes of use within the PSA should be on a case-by-case basis, having regard to the objective of maintaining a suitable balance between retailing and other town centre uses.

### **Monitoring Framework**

- 10.26 The study brief requires advice on how the LPA can further develop its monitoring systems in order to meet the requirements of the Annual Monitoring Report and also to ensure the reliable assessment of each of the centre's health. This is consistent with the guidance in PPS6 which states that the following matters should be kept under regular review:
- The amount of completed retail, office, and leisure development;
  - The percentage of the above in town centres;
  - The network and hierarchy of centres;
  - The need for further development; and
  - The vitality and viability of centres (based on the key indicators set out at paragraph 4.4 of PPS6).

The first two of the above matters are 'Core Output Indicators' for the Annual Monitoring Report and therefore we assume that the LPA already has an appropriate mechanism in place for monitoring these matters. The remaining matters are now considered in turn.

### ***Network and Hierarchy of Centres***

- 10.27 It is important to monitor and consider the likely effects of any changes or proposed changes in the regional shopping hierarchy. These are likely to manifest through emerging regional planning guidance (eg. Merry Hill's proposed designation as a Town Centre and its major expansion), to which the Council will be party, and therefore there is no specific requirement for additional

monitoring.

- 10.28 It is also important to monitor progress with individual development schemes coming forward in competing centres. While these may not, in themselves or combined, be of sufficient size to alter the hierarchy, the effect they may have on shopping/leisure patterns in Wyre Forest needs to be taken into consideration. We suggest that if the LPA is not already doing so, on a twice-yearly basis it consults with other LPAs in the sub-region in order to gain an update on major retail/leisure schemes coming forward or being proposed.

### ***The Need for Further Development***

- 10.29 In this report we have provided our best estimates of the need for additional retail floorspace in the main centres at 2011, 2016 and 2021. We have also advised that it is unrealistic to predict with certainty floorspace needs beyond more than a five year period, and that the longer-term projections outlined in this report should be used with caution and as a guide only. On this basis, and as advised in PPS6, it is essential to carry out regular monitoring and updating of the needs assessment.
- 10.30 We consider that it is appropriate to update the needs assessment every three years, taking into account up-to-date expenditure/population forecasts and any matters that are likely to have materially altered shopping patterns since the last assessment was carried out, or are likely to do so in the short-term. For example, at present it is not possible to predict with certainty the scale and timing of retail development that will come forward at Merry Hill, but it may be possible to do so within the next couple of years, once the Phase 1 revision of the RSS is adopted.

### ***The Vitality and Viability of Centres***

- 10.31 The LPA is already periodically monitoring many of the vitality and viability indicators for the town centres, as set out in the 'Retail Monitoring Report' (last updated April 2005). We recommend that this assessment is carried out annually, and suggest the following improvements to this mechanism:
- **Retail Ranking:** The summary table of the MHE UK Shopping Index provided in this study (Figure 5.1) should be updated periodically in order to consider how the strength of Kidderminster and Stourport as retailing destinations is changing relative to competing centres. MHE update their index every couple of years.
  - **Operator Demand:** Annual monitoring of the Focus Database (Kidderminster and Stourport), supplemented by consultation with local property market agents, in order to establish which

types of retailers are seeking representation and whether there are opportunities suited to their requirements. The Council may wish to follow this up by consulting with named operators in order to fully understand their requirements.

- **Pedestrian Flows:** We recommend that a specialist consultancy such as PEDS should be commissioned to carry out a comprehensive pedestrian footfall survey of Kidderminster and Stourport Town Centres. This should then be updated annually (either by re-commissioning the consultant or carrying out the research in-house) in order to identify trends in footfall.

## 11 CURRENT AND FUTURE CAR PARKING PROVISION IN KIDDERMINSTER TOWN CENTRE

11.01 As part of the Study Brief we have been asked to consider the extent to which car parking provision within Kidderminster town centre has changed as a result of the Weavers Wharf development and the extent to which the current level of car parking provision meets the requirements of visitors to the town centre. Information has been provided by the LPA relating to the physical changes in car parking provision in the centre in recent years and questions in both the household shopping survey and the town centre visitors survey provide information on how town centre visitors access the centre and views relating to the adequacy or otherwise of the car parking provision.

11.02 The above information is supplemented by our assessment of the comparative levels of usage of the various town centre car parks gained through field work. That assessment is based on observation of the general proportion of space use within individual car parks at different times of the day rather than any systematic, empirical techniques for counting/measuring vehicle movements and length of stay. The results of the assessment are attached as **Appendix R**. It can be seen that the most heavily used of the car parks on the day surveyed (a Saturday) were those at Pike Mills/Batemans Yard, Morrisons (multi storey), Market Street, Tesco and Weavers Wharf. There was noticeable underutilisation of the following car parks- Comberton Place, Swan centre, Bromsgrove Street, Lion Street and Prospect Lane.

11.03 The assessment of historic changes in the level of car parking provision (since 2000) shows the following:

<b>Spaces Removed (through redevelopment)</b>		<b>Spaces Created</b>	
Pitts Lane (Multi Storey)	576	Weavers Wharf	402
Pitts Lane (Surface)	250	Tesco	552
Market Street (Multi Storey)	550	Market Street	85
		B&Q	573
		Stadium Close Park & Ride)	153
<b>Total</b>	<b>1,376</b>	<b>Total</b>	<b>1,765</b>

11.04 It can be seen that while there has been a loss of some 1,376 spaces through redevelopment associated with the Weavers Wharf scheme and the relocation of Kidderminster College into the town centre (1,126 of which were multi-storey), some 1,765 new spaces have been provided in total, suggesting a net increase of 389 spaces. Some 153 of those new spaces are located in an out of centre location as part of the Stadium Park and Ride facility. A further 573 spaces are located at the B&Q store on Green Street which is a substantial walking distance from the PSA,

so that of the 1,376 accessible town centre spaces lost only some 1,039 have been replaced on a relatively 'like for like ' basis.

- 11.05 Nevertheless, the quantitative changes do not provide the full picture. For example, prior to its demolition to make way for the new college, the capacity of the Pitts Lane multi-storey car park was reduced to 140 spaces in 2000 due to structural defects and vandalism, suggesting that it was already qualitatively deficient by then. Moreover the quality of the Market Street car park was poor, with cramped parking spaces and poor lighting. Customer research by retailers generally concludes that multi-storey car parking is the least popular form of car parking provision and this is especially so for such developments built between the 1950's and 1980's which tended to be poorly designed and based on smaller car sizes. All of the car parking lost was subject to some kind of hourly charging regime. By contrast, the replacement car parking spaces are more spacious for comparative ease of car parking, they are surface level and many of them are free for a certain period (2 hours) which together represents qualitative improvement.
- 11.06 Turning to the results of the other surveys (household shoppers and on-street), we conclude that:
- While it is difficult to compare exactly the results of the 2000 household shopping survey with that of 2006, fewer respondents in 2006 consider the adequacy of the parking provision in Kidderminster to be good compared to the result in 2000;
  - Some 21% of the respondents to the on street survey in Kidderminster consider that the car parking provision in the town centre is worse than in other towns (while some 37% consider it to be about the same as elsewhere);
  - Some 37% of respondents to the street survey consider the car parking charges in Kidderminster town centre to be worse or much worse than elsewhere , compared to 32% who consider that they are about the same;
  - The most frequently used car parks in the town centre by respondents are the "Aldi" car park (off Green Street) and the Swan centre and some 21% of the respondents indicated that they had difficulty in obtaining a car parking space on the day of the visit;
  - Within zone 1 of the household shopping survey, some 35% rated the adequacy of car parking arrangements as poor (compared to 26% who rated them as good).

- 11.07 The above statistics present some evidence of discontent with the overall quality of car parking provision within Kidderminster from a user perspective and the first bullet point suggests the perception that the situation has worsened since 2000.
- 11.08 Our observation of how the car parking within the centre is being used suggests that certain car parks are more heavily patronised than others and that the level of usage of individual car parks is not necessarily price or quality sensitive. For example, the Pike Mills/Batemans Yard car park is consistently heavily used whereas the Swan Centre car park is better quality and slightly cheaper for the first two hours yet is not as heavily used. Accessibility to the town centre shopping area is better from the Swan Centre Car Park. The Bromsgrove Street car park is noticeably less well used than the Pike Mills/Batemans Yard car park even though it is as accessible from the town centre Ring Road and is closer to the prime shopping frontage than the Pike Mills/Batemans Yard car park. This suggests that further detailed research is necessary regarding car parking use which focuses on influential matters such as changes to pricing regimes and the views of car park users on the relative strengths and weaknesses of the various car parks through a bespoke questionnaire. Also issues relating to the signing of car parks may need to be examined in more detail to see if that influences the choice of car parks used. That research is beyond the scope of this retail study.
- 11.09 In general terms, based on our experience of auditing the vitality and viability of towns throughout the UK, we do not see any overriding evidence that the overall level of car parking provision to serve the town centre of Kidderminster is deficient to the extent that would justify the use of scarce town centre sites exclusively to build additional car parking spaces. It is more a case of exploring ways to ensure a more balanced use of the existing provision, perhaps through differential pricing and methods of signing. However it will be important to ensure that in accommodating the forecasted growth in retail floorspace within town centre and edge of centre locations, appropriate levels of new car parking provision are made as a part of the development, so that the overall level of provision in the town centre is not reduced to the point where significant and noticeable shortfalls become apparent.