www.lsh.co.uk

BLACK COUNTRY CENTRES STUDY 2020

Volume 2: Healthchecks

For

The Black Country Authorities Comprising:
City of Wolverhampton Council
Dudley Metropolitan Borough Council
Sandwell Metropolitan Borough Council
Walsall Council

Prepared by
Lambert Smith Hampton
United Kingdom House
180 Oxford Street
London W1D 1NN

Tel: 020 7198 2000
Fax: 020 7198 2001
Date: **March 2020**

Lambert Smith Hampton

Volume 2: Healthchecks

Appendix 1: Wolverhampton City Centre

Wolverhampton City Centre Health Check Appraisal

The health check covers the following aspects:

- Sub-regional shopping hierarchy
- Diversity of main town centre uses
- Proportion of vacant property
- Customer's Experience and behaviour
- Retailer representation / Balance between independent and multiple stores
- Pedestrian footfall
- Accessibility
- Perception of safety and occurrence of crime
- Commercial rents
- Environmental quality
- Extent to which there is evidence to barriers to new businesses and existing business expanding
- Opening hours / availability / extent to which there is an evening and night time economy offer
- Digital infrastructure in Wolverhampton

Wolverhampton is a major city comprising part of the West Midlands conurbation and forming a major part of the Black Country and Greater Birmingham region. Located in the north west and on the edge of the Black Country and Birmingham conurbation, Wolverhampton is key a gateway between the historic Black Country and the countryside of Shropshire and Staffordshire. The city is known for its cultural diversity, arts and entertainment. Its retail offer is characterised by independent and multiple retailers, markets in addition to two purpose built shopping centres (Wulfrun Shopping Centre and the Mander Centre). The principal pedestrianised shopping area includes the two purpose built shopping centres as well as Dudley Street and adjoining side streets.

Since the 1970s, the local economy of the city has moved from a manufacturing to service based economy. The local economy still has a larger manufacturing sector than most cities in the UK and the city is reliant on jobs in the public and health sectors. In terms of future outlook, there is £4.4bn of investment planned to strengthen the local economy. Opportunities include a new railway station as part of the £150m integrated transport hub and new commercial district for business services. The revival of the city is underpinned by three strategic economic regeneration zones:

- Northern Growth Corridor – location of the i54 enterprise zone, home to 4,000 jobs.
- City centre – recipient of £1bn of investment and with a new commission to reimagine its future use.
- Bilston – south of the city where major regeneration including 500 new homes and open space is planned[1].

The city centre also benefits from a Business Improvement District (BiD). It was established in 2015 with a 5 year plan and with an investment of £3m. In 2019 the Wolverhampton BID was re-elected for a second 5 year term. It currently has just under 700 businesses participating. The defined area of the BiD is shown below[2]:

Figure 1: The Wolverhampton BiD Area

Most recently, the city has been successfully shortlisted to receive funding under the government's Future High Streets Fund (FHSF). The successful bid focuses on the area of the city centre to the west of, and including, Victoria Street. Support through the FHSF seeks to build on the strong delivery that is already underway in the city centre, and to will enhance and connect an area of the city centre that has, over recent years faced a number of challenges. The council has been

[1] Source: https://insight.wolverhampton.gov.uk
[2] Source: https://enjoywolverhampton.co

allocated a £150,000 resource funding grant by the Ministry of Housing, Communities & Local Government (MHCLG) to help develop a full business case (as at July 2019).

Lambert Smith Hampton

Sub-Regional Shopping Hierarchy

Table 1: Sub-Regional Shopping Hierarchy

VENUE	SCORE (2016/17)	Local Planning Authority	Venuescore Location Grade (2016/17)	2016/17 Rank
Merry Hill Shopping Centre	219	Dudley MBC	Regional	62
Wolverhampton	189	City of Wolverhampton Council	Regional	92
Walsall	172	Walsall Council	Regional	115
West Bromwich	129	Sandwell MBC	Sub-Regional	186
Dudley	60	Dudley MBC	Major District	492
Brierley Hill	30	Dudley MBC	District	1074

Source: Venuescore 2016-17 UK Shopping Venue Rankings (Javelin Group)

Wolverhampton is ranked within the top 100 centres in the UK in Venuescore's Shopping Venue Rankings. It is below the individual ranking for the Merry Hill shopping centre. A comparison with the historical ranking shows that whilst Wolverhampton has retained its position within the sub-region, it has nevertheless moved down by some 43 places since 2010.

Lambert Smith Hampton

Table 2: Sub-Regional Hierarchy: Historical Review

VENUE	SCORE (2016/17)	Local Authority	Location Grade (2016/17)	2016 Rank	2014 Rank	2010 Rank	Change 2010 –2016
Wolverhampton	189	Wolverhampton	Regional	92	68	49	-43
Walsall	172	Walsall	Regional	115	116	143	+28
West Bromwich	129	Sandwell	Sub-Regional	186	161	238	+52
Stourbridge	72	Dudley	Major District	390	468	498	+108
Brierley Hill	62	Dudley	District	1074	989	794	-280
Dudley	60	Dudley	Major District	492	414	345	-147
Halesowen	57	Dudley	Major District	520	456	373	-147
Bilston	41	Wolverhampton	District	754	674	628	-126
Oldbury	37	Sandwell	District	847	966	976	129
Smethwick [Bearwood Rd]	37	Sandwell	District	847	768	*	N/A
Rowley Regis, Blackheath	34	Sandwell	District	937	989	1050	+113
Bloxwich	32	Walsall	District	1008	935	902	-106
Tipton, Great Bridge	28	Sandwell	Minor District	1140	1792	*	N/A
Wednesbury	27	Sandwell	Minor District	1187	1061	976	-211
Aldridge	26	Walsall	Minor District	1233	1167	1139	-94
Brownhills	26	Walsall	Minor District	1233	1257	1096	-137
Smethwick, Windmill SP [Cape Hill]	23	Sandwell	Minor District	1368	1257	458	N/A
Willenhall	26	Walsall	Minor District	1233	1021	1377	+144
Wednesfield	21	Wolverhampton	Minor District	1481	1257	936	-545
Cradley Heath	21	Sandwell	Minor District	1481	1406	*	N/A
Darlaston	15	Walsall	Local	2021	1895	628	-1393

Source: Venuescore 2016-17, 2014-15 and 2010-11 UK Shopping Venue Rankings (Javelin Group); * = comparable data not available

Photographs of Wolverhampton City Centre

Source: © Lambert Smith Hampton

Lambert Smith Hampton

Diversity of Main Town Centre Uses

Table 3: Number of Units in Wolverhampton

Category	No.	%	UK (2019)
Convenience	57	7.7	9.2
Comparison	189	25.7	29.5
Retail Service	94	12.8	15.0
Leisure Service	157	21.3	24.4
Financial and Business Service	76	10.3	9.9
Other Retail	2	0.3	0.1
Vacant	161	21.9	11.7
Total	**736**	**100%**	**100%**

Source: Experian Goad Category Report, September 2019

Table 4: Composition of Floorspace in Wolverhampton

Category	Sq.m	%	UK (2019)
Convenience	4,988.9	2.9	15.4
Comparison	64,873.7	38.3	33.8
Retail Service	8,667.8	5.1	7.0
Leisure Service	34,392.4	20.3	25.5
Financial and Business Service	15,496.1	9.2	7.4
Other Retail	167.2	0.1	0.1
Vacant	40,849.1	24.1	10.4
Total	**169,435.2**	**100%**	**100%**

Source: Experian Goad Category Report, September 2019

Convenience Goods Units

There are 57 convenience units according to the 2019 Goad survey representing 7.7% of the total number of outlets but below the national average of 9.2%. Also in terms of convenience goods floorspace, it ranks significantly below national average (22.9% vs 15.4%). Wolverhampton has a number of convenience retailers including Sainsbury's, Sainsbury's Local, Co-op, and Iceland. The provision is dominated by 12 Convenience, Tobacco. Newsagent (CTN) outlets; 10 convenience stores, 11 butchers, 8 bakers & confectioners, 8 grocers and delicatessens; two fishmongers, two health food stores, two shoe repair shops, one frozen food outlet and one supermarket. There are no identified outlets such greengrocers or an off-license. To note, that whilst the latest Experian data states zero in relation to the 'markets' heading, the permanent stalls at Wolverhampton Market have already been defined and recorded accordingly under the defined categories above.

Comparison Goods Units

According to the 2019 Goad Category Report, there are 189 comparison goods retailers trading from a total floorspace of 64,874 sqm. The number of outlets represents 25.7% of total units in the centre, which is below the national average of 29.5%. The current comparison goods provision represents 38.3% of total floorspace in the centre, which is higher than the national average of 33.8%.

In terms of its overall non-food provision the key headlines are:

- The highest number of comparison outlets is in the telephone & accessories sub-category (14 units – 1.9% vs 1.4% nationally); followed by ladies &

menswear & accessories (13 units 1.8% vs 1.6% nationally) and jewellery, watches & silver shops (12 units – 1.6% vs 1.5% nationally).

- There are 10 charity shop units, though the composite proportion of 1.4% is lower than the national average 2.7%.
- There is an over provision in the categories of: department & variety stores (6 units – 0.8% vs 0.5% nationally); greeting cards (8 units – 1.1% vs 0.7% nationally); toys, games & hobbies (8 units – 1.2% vs 0.7% nationally); other comparison goods (11 units 1.5% vs 0.9% nationally).
- Key fashion multiple retailers include Next, River Island, H&M, New Look, Topshop/Topman, Deichmann and Sportsdrect.com. Department and variety brands include Primark, Marks & Spencer, Beatties and Debenhams (though set for closure as part of national restructuring). Non fashion multiples include Poundland, Boots, The Entertainer, Pandora, Superdrug and Wilkinson amongst others.
- There is no representation across a range of comparison goods categories including: catalogue showrooms, fitted furniture, gardens & equipment, office supplies, photographic & optical and vehicle accessories.
- The independent retailer provision is interspersed across the centre and is characterised by small to medium sized stores selling a variety of goods including gifts/crafts/toys retailers, jewellers, clothing outlets, florists and furniture.
- Significant under representation is seen in the categories of 'chemist & drugstores' (0.1% vs 1.1% nationally); 'clothing general' (1% vs 1.7% nationally); 'crafts, gifts, china & glass' (0.7% vs 1.6% nationally); 'ladies wear & accessories' (1% vs 1.8% nationally); 'hardware & household goods' (0.8% vs 1.3% nationally).

In summary, we consider a good provision of comparison goods provision with representation by major multiples and supported by independent retailers. The large proportionate quantum of comparison goods prevision underpins the role of the centre as a key location for this shopping category.

Service Provision

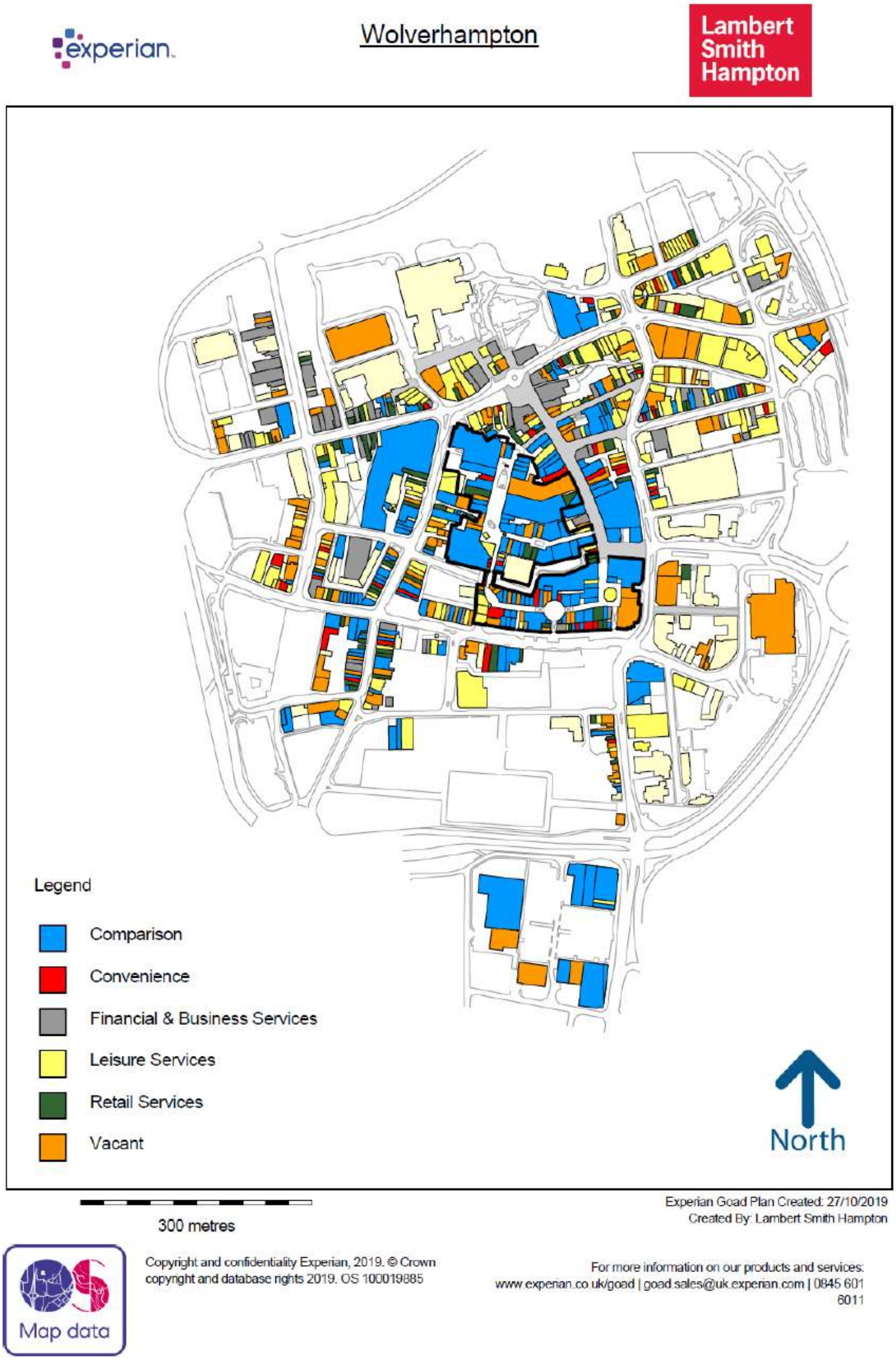
Service businesses are defined by Experian Goad as including retail, professional and financial services and leisure services and other retail. As Table(s) 1 and 2 and show that in combination these categories comprise 329 service outlets. These represent 44.7% of all units which is below the national average of 49.4%. However, the associated floorspace provision of 34.7% is lower than the national average (39.9%).

The following provides a brief summary of provision in the different service categories:

- There are 94 **retail services**, which account for 12.8% of total outlets. This is below the national average of 15%. This category is mostly made up of health and beauty outlets (68 units) and opticians (10 units).
- With reference to **financial & business services**, there are 76 outlets, which represent 10.3% of total units which is marginally higher than the national average of 9.9%. This category comprises mainly of 19 property services units, 15 retail bank units, 14 legal services units, 9 employment & careers and 8 financial services outlets.

- There are 157 **leisure services** outlets which represent 21.3 of total provision which is lower than the national average 24.4%. In terms of floorspace this stands at 20.3% which is lower than the national average of 25.5%. Leisure provision is dominated by 40 fast food and take away outlets, followed by 29 cafes, 21 restaurants, 21 public houses, 11 bars & wine bars and 11 casino & betting offices. A large proportion of these are independent led and spread across the centre. Commercial leisure is seen in the form of Starbucks (Wolverhampton University), Costa, McDonald's Burger King, Yates, Ladbrokes and Coral.
- In summary, the overall level of service provision is comparatively lower than the national average with the leisure service dominating predominantly in the food and beverage category (take-ways, cafes, restaurants, public houses, bars & wine bars).

Figure 2: Wolverhampton City Centre: Diversity of Uses

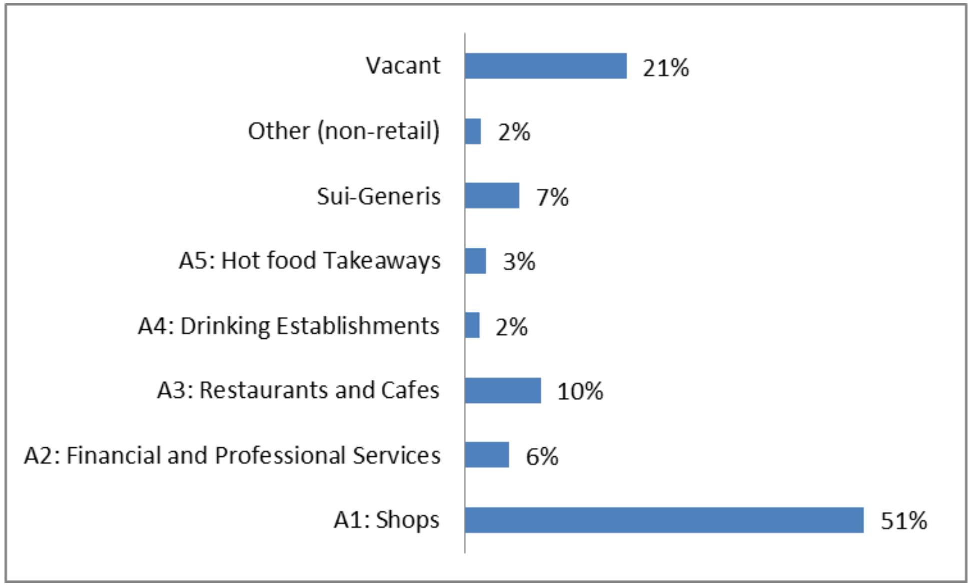


Proportion of Vacant Street Level Property

The 2018 Goad data shows 161 vacant outlets. This represents a vacancy level of 21.9%, which is considerably higher than the national average of 11.7%. In terms of floorspace this 24.1% of the total and considerably higher than the national average of 10.4%.

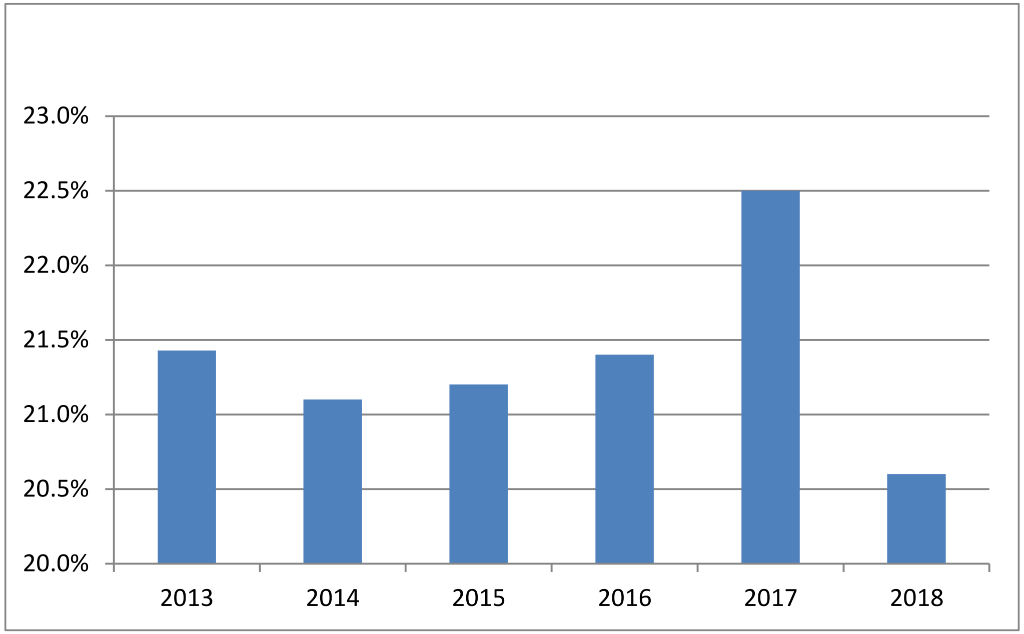
Analysis of the Council's own monitoring information (based on classifying units by Use Class and aligned to the area defined within the Wolverhampton city centre's Area Action Plan (AAP) and specifically frontages within the Shopping Core Character Area Boundary) shows the vacancy level stands at 21% which is comparable to that defined by Experian Goad of 21.9%.

Figure 3: Analysis of Wolverhampton City Centre's AAP Frontages



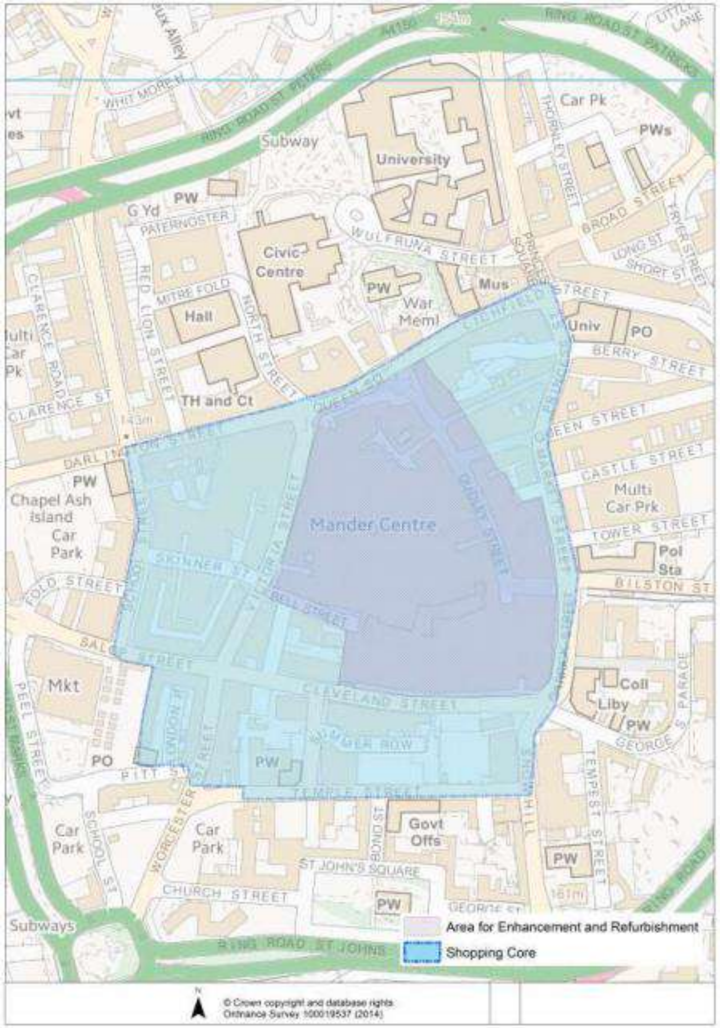
Furthermore, and over a five year period between 2013 and 2018, the Council's data shows that vacancy rates have stayed above 20% with a peak in 2017 0f 22.5%.

Figure 4: Wolverhampton: Vacancy Rate (2013 – 2018)



It was observed during our site vist that vacant units are spread across the centre. Notwithstanding this there are some units that comprise large floorplates particularly in the Mander Centre. A small cluster of units was observed at the intersection of Lichfield Street and Princess Street.

Figure 5: **Wolverhampton: Shopping Core Character Area Boundary**



Source: https://www.wolverhampton.gov.uk/sites/default/files/pdf/Wolverhampton_City_Centre_AAP_-_Adopted_Version.pdf

Customers' Experience and Behaviour

The household telephone interview survey (HTIS) asked specific questions on respondents' views and perceptions of their local city or town centre. For those whose centre was Wolverhampton City Centre, the overwhelming majority of the respondents visited either one day a week (12.1%); Every two weeks (11.4%); Monthly (17%). Additionally some 4.7% frequented every 2-3 days; 1% frequented every 4-6 days a week and 2.1% daily. Only 17% of those who responded never visited the centre. Additionally of this sample 52% used the centre for household shopping and town centre uses.

In terms of what people 'like' about Wolverhampton City Centre, the most frequently raised themes are shown below:

Table 5: Wolverhampton City Centre: Top 'Likes'

Response	%
Nothing / Very Little	53.7%
Close to home	16.7%
Good range of non-food shops	5.8%
Good range of 'high street' retailers/ multiples	5.1%
Easy to get to by car	4.7%
Easy to get to by bus	4.2%
High quality shops	3.4%

Source: HTIS 2019

As the table shows the majority of respondents (who frequented the centre) considered that that there was very little that they specifically liked about the city centre. Notwithstanding this, proximity to home and the range of non-food shops and national multiples represent a draw to those that use the centre.

Respondents were also asked what, if anything, they would improve in Wolverhampton City Centre that might encourage them to visit more. The most frequent suggestions were as follows:

Table 6: Wolverhampton City Centre: Key Improvements

Response	%
More national multiple shops / High Street shops	35.6%
More independent shops	26.9%
(Nothing)	16.1%
Free car parking	15.7%
More / better parking	10.2%
More / better comparison retailers (i.e. non-food shops)	8.5%
Cleaner streets	7.2%
Make it more attractive / revamp it	6.1%

Source: HTIS 2019

As the table shows a high proportion of respondents suggest enhancing the retail offer (more multiple and independent shops) as well as free / more car parking.

Of those whose nearest centre was Wolverhampton City Centre but who never visited the centre the top reasons cited broadly mirrored the improvements i.e. enhancing the retail offer as well as parking and quality of the environment. Additionally, safety and security is raised as an issue.

Table 7: Wolverhampton City Centre: Top Reasons for Not Visiting

Response	%
Poor range of shops	30.52%
Poor parking provision	14.01%
Feels unsafe	13.98%
Poor range of non-food shops	10.18%
Poor range of 'high street' retailers/ multiples	6.59%
Unattractive environment / rundown	5.52%
Poor range of independent shops	5.52%
Poor quality shops	4.95%

Source: HTIS 2019

Retailer Representation

Multiple retailers act as anchor tenants in a centre and can add to its appeal and create additional pedestrian footfall. Experian Goad produces a list of the top comparison goods retailers, which acts as a measure of the vitality and viability of a centre.

Based on the 2019 Goad Category Report, there are 187 multiple retailers out of a total count of 736 outlets. This includes fascias such as Marks & Spencer, Argos, Debenhams (closed in December 2019), Boots, Primark, River Island, H & M, Wilkinson, and Sainsbury's. Multiples therefore account for almost a quarter (25.4%) of the total units, with independent retail representing the remaining majority of 74.6% of the total units. The independent offer is therefore considered to be strong. The table below illustrates the provision of multiple retail and service outlets and shows above average representation of multiples in the comparison goods and financial & business service categories.

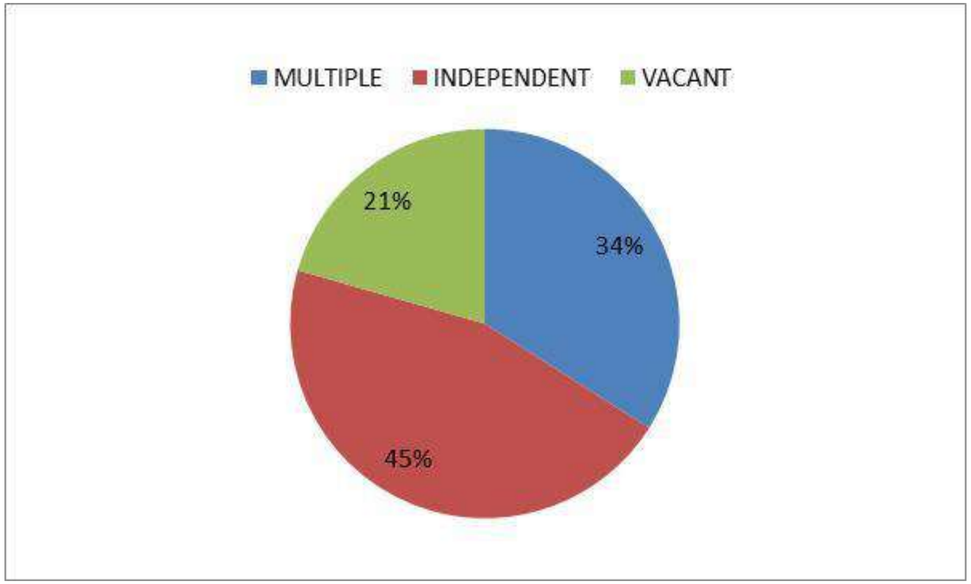
Table 8: **Category Composition**

Category	No. of Outlets	% of Total Outlets	UK Average 2019 (%)
Comparison	86	46.0	42.6
Convenience	13	7.0	11.4
Retail Service	15	8.0	9.4
Leisure Service	37	19.8	22.2
Financial & Business Service	36	19.3	14.4
Total	**187**	**100**	**100.0**

There is a good and complementary mix of multiple and independent retailers, serving the centre and its catchment population. Nonetheless, it will be important to maintain the current level of multiple retailers in order to retain the attraction and vitality of the centre. This is particularly important given the headwinds faced by the retail sector as witnessed by the announced closure of the Debenhams Department Store in the Mander Centre in December 2019.

The Council's own data (aligned to the area defined within the Wolverhampton city centre's AAP and specifically frontages within the Shopping Core Character Area Boundary) further confirms the dominance of the independent sector:

Figure 6: Wolverhampton: Shopping Core Character Area Multiples vs Independents



In terms of operators seeking representation we have identified that there are 17 operators with a total requirement of between 6,666 sq m (71,750 sq ft) and 15,203 sqm (163,650 sq ft) as shown in Table 9 below. However, it is worth noting that KFC had a presence in the city centre until recently, Aldi has stores in close proximity to the city centre at Birmingham New Road and Broad Gauge Way and Savers already has a presence in Wolverhampton City Centre in the Wulfrun Centre.

Lambert Smith Hampton

Table 9: Wolverhampton City Centre: Operators Seeking Representation

Operator	Planning Class	Size sq ft (min)	Size sq ft (max)	Size sq m (min)	Size sqm (max)
Rock This	A1	6,000	20,000	557	1,858
Savers	A1	1,500	3,000	139	279
Aldi (Central England)	A1	10,000	No Max	929	No Max
KÄRCHER	A1	4,000	8,000	372	743
Lidl (West Midlands/ Central England)	A1	10,000	30,000	929	2,787
Supercuts	A1	600	750	56	70
Creams Café	A1 / A3	1,400	2,000	130	186
GDK	A3	250	2,500	23	232
KFC (Yorkshire / Midlands & Wales)	A3	1,800	3,500	167	325
Topps Tiles (Midlands)	B8	2,500	8,000	232	743
NHS Orthodontc Practice	D1	1,500	2,500	139	232
Vets4Pets (West)	D1	1,500	2,000	139	186
Kumon	D1	700	1,400	65	130
Hollywood Bowl	D2	12,000	30,000	1,115	2,787
Air Nation	D2	8,000	20,000	743	1,858
Snap Fitness (West Midlands)	D2	4,000	10,000	372	929
Simply Gym	D2	6,000	20,000	557	1,858
Total		**71,750**	**163,650**	**6,666**	**15,203**

Source: The Requirements List

Accessibility and Pedestrian Footfall

Road Access:

In broad terms the city centre is compact and highly accessible. It is accessible to the M6, M6 Toll, M54, M5 and M42.The City is located 24 km (15 miles) north west of Birmingham, and 220 km (140 miles) north west of London. It is 4.8km (3 miles) South of Stoke on Trent and 27.3 km (17 miles) East of Telford. More locally it is 3.5km (2.2.miles) to Wednesfield, 4.1km (2.5 miles) to Bilston 4.8km to Sedgley (3 miles) and 4.9km (3 miles) to Willenhall.

Wolverhampton benefits from good road connections being situated at the convergence of the A449, A41, A454, A460 and A459 routes. Junctions 9 and 10 of the M6 are situated 10 km (4 miles) to the east, with Junction 2 of the M54 adjacent to the north of Wolverhampton and the M5 14 km (5 miles) to the south east. In addition, links in the area have improved noticeably in recent years following the opening of the M6 Toll to the north of the City.

Wolverhampton benefits from excellent road links both locally and nationally.

Rail Access:

By rail Birmingham is some 17 minutes away; Manchester 70 minutes and London 98 minutes. The city is also set to benefit from the expanding tram network. There is a £150m transport hub regeneration programme (the Interchange) to link national rail, metro and bus services. This expands the routes of the Midlands Metro and is set to create a railway station with more capacity. Wolverhampton train station is managed by West Midlands Railway with local and regional services running frequently from the station.

Figure 7: **Wolverhampton: Tram**

Source: © Lambert Smith Hampton

Car Parking:

There are 33 car parks providing 7,400 spaces within the city centre operated by the Council (2,468 spaces (33%) in 13 car parks) and privately (4,932 spaces (67%) in 20 car parks), including private non-residential. The majority are located within the Ring Road, and comprise a mixture of long stay (2,573 spaces) and short stay (3,857 spaces) areas. In addition, controlled on-street car parking (505 spaces) is provided on various streets within the city centre area

Long-stay spaces are generally located in car parks around the periphery of the city centre, and often beyond the boundary of the Ring Road. The short-stay spaces are located in car parks inside the Ring Road, effectively within the core retail / business area of the city centre. A further 970 short-stay spaces are located outside of the Ring Road; however their use is largely restricted to customers of Asda and the St Johns Retail Park to which the car parks belong, with parking limited to a maximum of two hours[3].

We understand that additional car parking spaces have been introduced at car parks in Bell Street, Temple Street and Tempest Street. These are available for free every day from 5.30pm until 4am from April 1. These further add to the existing 400 on-street spaces which are free after 6pm. The aim of these is to encourage more drivers to come into the city centre, bringing a boost for shops, pubs and restaurants.

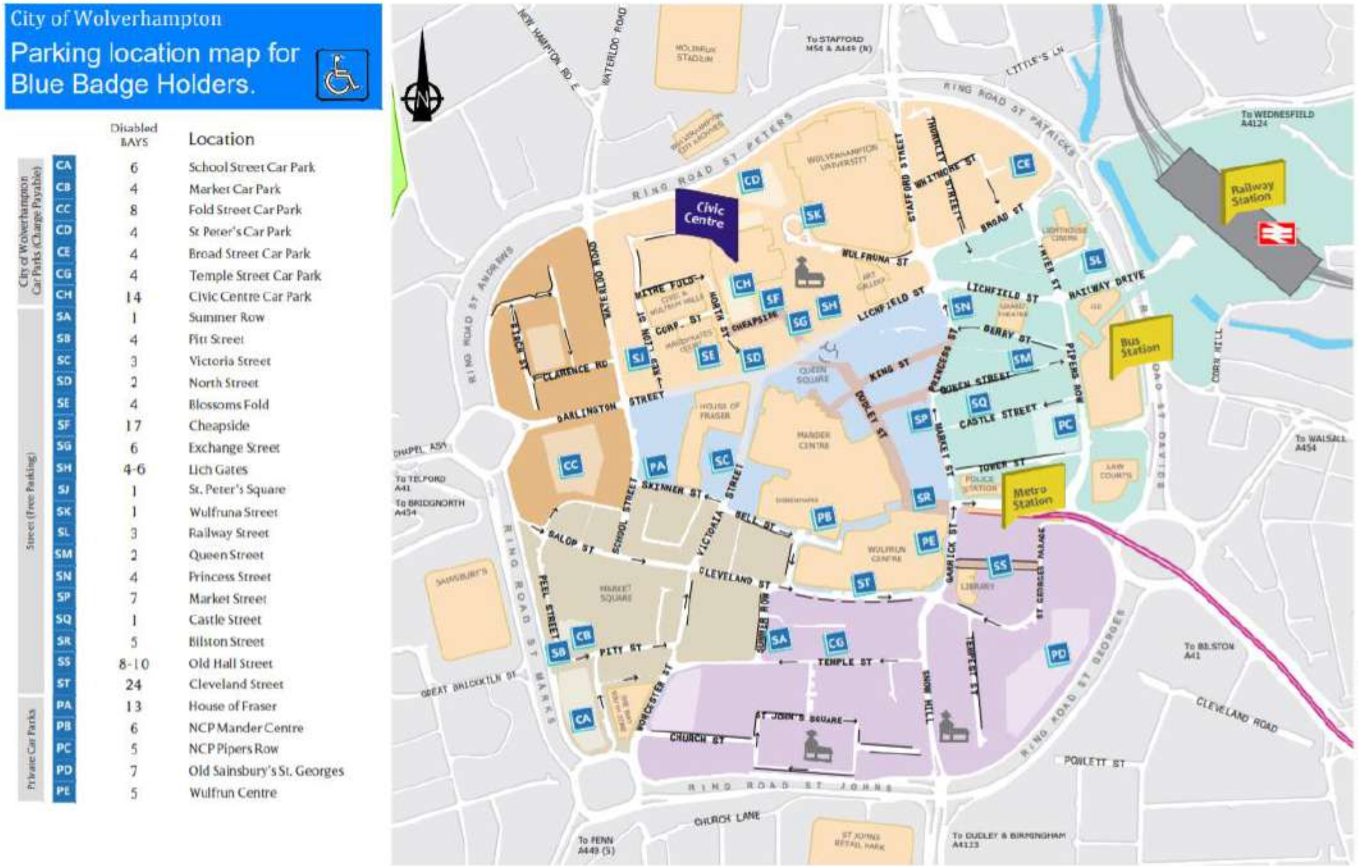
The car parks across Wolverhampton city centre come with their own parking restrictions. There is also on-street parking available in certain areas. Pay and display

[3] https://wolverhampton.moderngov.co.uk/Data/Cabinet/201202211700/Agenda/05K%20-%20City%20Centre%20Strategic%20Car%20Parking%20Review.pdf

machines are used for on-street parking bays. Some areas require a Wolverhampton parking permit. On-street parking is divided into two zones. Parking restrictions are in place in both zones from 8.30am to 6pm, 7 days a week. In Zone 1, the parking charges are 60p per 20-minute period with a maximum stay of 2 hours. In Zone 2, the parking charges are 60p per 40-minute period with a maximum stay of 2 hours.

'Blue badge' disabled parking is provisioned across city centre as shown below:

Figure 8: Wolverhampton: Blue Badge Parking Provision



Source: https://www.wolverhampton.gov.uk/sites/default/files/pdf/T4_3858_City_Centre_Blue_Badge_Bays_%2528002%2529.pdf

It is understood that the in broad terms the council seeks to ensure that the quantity, quality, price and location of car parking supports the city's regeneration. Examples of this can be seen through the provision of additional multi-storey car parking as part of the Interchange Scheme, the proposals for Westside and car park aspirations for the Molineux Campus. Additionally the City Centre AAP (para 3.1.35) seeks to ensure no overall net loss of parking spaces.

Public Transport:
The centre is well connected particularly with bus stops and along bus routes to local and national destinations (e.g. Codsall, Dudley, Telford, Birmingham, London)

Lambert Smith Hampton

Table 10: Bus Stops and Services in Wolverhampton City Centre

Bus Stops in Wolverhampton

Art Gallery (Stop BP)	5,5A,67,711,712,763
Art Gallery (Stop BA)	1,62,62A
Art Gallery (Stop BB)	5,5A,6,6A,10,10A,10B,711,877,878,891
Art Gallery (Stop BC)	2,9,15,15A,16,16S,61,64,67,877,878
Art Gallery (Stop BN)	1,6,6A,10,10A,10B
Art Gallery (Stop BC1)	3,4,63
Asda (adj)	62,62A
Beatties (Stop BD)	5,5A,6,6A,62,62A,877,878,891
Beatties (Stop BE)	3,4,9,10,10A,10B,711
Beatties (Stop BF)	1
Beatties (Stop BM)	1,5,5A,6,6A,10,10A,10B,711,763
Bell Street (Stop CD)	2,15,15A,16,16S
Bell Street (Stop CU)	712
Burton Rd (opp)	57,59,60,65,69,71
Burton Rd (adj)	57,59,60,65,69,71
Canal Bridge (before)	82,529,545
Canal Bridge (after)	82,529,545
Church Street (Stop CJ)	2,15,15A,16,16S,25,26A,63,64
Clarence St (Stop BL)	5,5A,6,6A,763
Clarence St (Stop BJ)	5,5A,6,6A,62,62A,877,878
Coach Park (before)	SW
Compton Rd (adj)	1,3,4,9,10,10A,10B,711
Cross St North (adj)	2,11,70,71,71A
Cross St North (opp)	2,11,70,71
Culwell St (opp)	57,59,60,65,69,71
Culwell St (adj)	57,59,60,65,69,71
Dunkley St (adj)	6,6A,763
Dunkley St (opp)	6,6A,763
Fold St Car Park (Stop BH)	1,10,10A,10B,711
Fold St Car Park (Stop BG)	1,3,4,9,10,10A,10B,711,891
Fryer St (Stop AG)	6,6A,10,10A,10B
Granville Street (adj)	52,81
Granville Street (opp)	52,81
Hallet Drive	63
Horseley Fields (before)	82,529,545
Horseley Fields (after)	82,529,545
Hospital St (adj)	53,79,530
Hospital St (opp)	53,79,530
London Place (Stop CK)	2,15,15A,16,25,26A,63,64,712
Lord St (adj)	63
Lord St (opp)	63
Mander Centre (Stop CA)	63,64,67
Mander Centre (Stop CC)	2,15,15A,16,16S,61
Molineux Stadium (adj)	3,4,5,5A,62,62A
Molineux Stadium (opp)	3,4,5,5A,62,62A,877,878
Old Hall St (Stop AM)	25,26A,27,27A,713,X8
Old Hall St (Stop AN)	1
Park Avenue (adj)	6,6A
Park Avenue (opp)	6,6A,763
Pipers Row (Stop AH)	1
Police Station (Stop AK)	9,891,X8
Police Station (Stop AL)	161
Police Station (Stop AJ)	2,713
Police Station (Stop AJ1)	15,16,25,26A,27,27A,63,64
Police Station (Stop AR)	530,545
Powlett Street (adj)	52,81
Powlett Street (opp)	52,81
Princess Street (Stop AW)	1,3,4,54,54A,61
Red Hill Street (after)	WU1
Ring Rd (Stop CQ)	3,4,9,891
Salop St (Stop CS)	63,64
Salop St (Stop CR)	67
School St (Stop CM)	63,64
Shakespeare St (opp)	82,529,545
Shakespeare St (adj)	82,529,545
Stafford St (after)	2,11,70,71,71A
St Marks Church	1,3,4,9,10,10A,10B,711
Sutherland Place (opp)	530
Sutherland Place (adj)	530
Temple St (Stop AQ)	1,27,27A,61,713,X8
Temple St (Stop AP)	1,27,27A,61,713,X8
The Royal (Midland Metro Stop) (Platform 1)	MM1
The Royal (Midland Metro Stop) (Platform 2)	MM1
Thornley St (Stop AV)	2,5,5A,6,6A,9,10,10A,10B,11,15,15A,16,16S,32,33,54,54A,70,71
Thornley St (Stop AE)	10,10,A10B,54,54A
Tower St (Stop AS)	54,54A
Tower St (Stop AS1)	34
University of Wolverhampton (Stop AD)	2,3,4,11,32,33,54,54A,62,62A,67,877,878
University of Wolverhampton (Stop AA)	71,WU1
University of Wolverhampton (Stop AB)	3,4,32,33,54,54A
University of Wolverhampton (Stop AC)	2,11,67,70,71,71A
University of Wolverhampton (Stop ZK)	54,54A
Victoria Fold (Stop CT)	63,64,67
Wolverhampton Bus Station (Stand A)	25,26A,27,27A,61
Wolverhampton Bus Station (Stand B)	9,52,81,82
Wolverhampton Bus Station (Stand C)	5,5A,54,54A
Wolverhampton Bus Station (Stand D)	6,6A,54,54A,891
Wolverhampton Bus Station (Stand E)	210,325,328,333,387,410,415,420,422,675
Wolverhampton Bus Station (Stand F)	59
Wolverhampton Bus Station (Stand G)	60,713
Wolverhampton Bus Station (Stand H)	10,10A,10B,50
Wolverhampton Bus Station (Stand J)	53,63,64
Wolverhampton Bus Station (Stand K)	32,33
Wolverhampton Bus Station (Stand L)	15,15A,16,16S
Wolverhampton Bus Station (Stand N)	11,530
Wolverhampton Bus Station (Stand P)	11,57,65,69
Wolverhampton Bus Station (Stand Q)	529
Wolverhampton Bus Station (Stand R)	79
Wolverhampton Bus Station (Stand S)	2,X8
Wolverhampton Bus Station (Stand T)	2
Wolverhampton St George's (Midland Metro Stop) (Platform 1)	MM1
Wulfrun Centre (Stop CG)	2,15,15A,16,26A,6,163
Wulfrun Centre (Stop CF)	3,4,9,25,64

Lambert Smith Hampton

Bus Service Routes Wolverhampton

1 - Tettenhall Wood - Dudley via WolverhamptonNational Express West Midlands
1 - Wolverhampton - Tettenhall Wood via Chapel AshLet's Go
2 - Bushbury - Warstones via WolverhamptonNational Express West Midlands
2 - Bushbury - Wolverhampton via First AvenueLet's Go
3 - Fordhouses - Castlecroft via WolverhamptonNational Express West Midlands
4 - i54 - Spring Hill via WolverhamptonNational Express West Midlands
5 - Wolverhampton - Codsall via Dunstall, BillbrookNational Express West Midlands
5A - Wolverhampton - Codsall via Dunstall HillNational Express West Midlands
6 - Wolverhampton - Wobaston via AldersleyNational Express West Midlands
6A - Wolverhampton - Wobaston via AldersleyNational Express West Midlands
9 - Wolverhampton - BridgnorthArriva Midlands North
9 - Bridgnorth - Shipley - WolverhamptonArriva Midlands North
10 - Wolverhampton - Perton via ComptonNational Express West Midlands
10 - Perton - WolverhamptonNational Express West Midlands
10A - Wolverhampton - Pattingham via Compton, PertonNational Express West Midlands
10A - Pattingham - Perton - WolverhamptonNational Express West Midlands
10B - Wolverhampton - Codsall via Compton, PertonNational Express West Midlands
10B - Codsall - Perton - WolverhamptonNational Express West Midlands
11 - Wolverhampton - Underhill via Fallings ParkNational Express West Midlands
11 - Wolverhampton - UnderhillLet's Go
15 - Wolverhampton - Merry Hill via WombourneNational Express West Midlands
15A - Wolverhampton - Merry Hill via KingswinfordNational Express West Midlands
16 - Wolverhampton - Stourbridge via KingswinfordNational Express West Midlands
16S - Wolverhampton - Stourbridge via KingswinfordNational Express West Midlands
25 - Wolverhampton - Pendeford via WednesfieldNational Express West Midlands
26A - Wolverhampton - StowlawnDiamond Bus
27 - Wolverhampton - Dudley via Sedgley, Gornal WoodNational Express West Midlands
27A - Wolverhampton - Dudley via Sedgley, Gornal WoodNational Express West Midlands
32 - Wolverhampton - Northwood Park CircularNational Express West Midlands
32 - Wolverhampton - Northwood Park Circ. ClockwiseLet's Go
33 - Wolverhampton - Northwood Park CircularNational Express West Midlands
33 - Wolverhampton - Northwood Park Circ. AnticlockwiseLet's Go
50 - Wolverhampton - Wednesfield via Fallings ParkNational Express West Midlands
52 - Wolverhampton - Coseley via ParkfieldBanga Buses
53 - Wolverhampton - Rocket Pool via WednesfieldBanga Buses
54 - Wolverhampton - Stafford via i54National Express West Midlands
54 - Stafford - Penkridge - I54 - WolverhamptonNational Express West Midlands
54A - Wolverhampton - StaffordNational Express West Midlands
54A - Stafford - I54 - WolverhamptonNational Express West Midlands
57 - Wolverhampton - Bilston via WednesfieldDiamond Bus
59 - Wolverhampton - Ashmore Park via WednesfieldNational Express West Midlands
60 - Bloxwich - Wolverhampton via WednesfieldNational Express West Midlands
61 - Wolverhampton - Goldthorn ParkNational Express West Midlands
62 - Wolverhampton - Compton Circular ClockwiseNational Express West Midlands
62A - Wolverhampton - Compton Circular AnticlockwiseNational Express West Midlands
63 - Wolverhampton - Oxbarn Avenue via BradmoreDiamond Bus
64 - Wolverhampton - Wakeley Hill via Penn RoadDiamond Bus
65 - Wolverhampton - Fordhouses via New Cross HospitalDiamond Bus
67 - Wolverhampton - Cannock via ShareshillSelect Bus Services
69 - Walsall - Wolverhampton via New InventionNational Express West Midlands
70 - Cannock - Featherstone - WolverhamptonArriva Midlands North
71 - Cannock > Wednesfield : WolverhamptonSelect Bus Services
71 - Cannock - Essington - WolverhamptonSelect Bus Services
71A - Cheslyn Hay - FeatherstoneSelect Bus Services
79 - Wolverhampton - West Bromwich via WednesburyNational Express West Midlands
81 - Wolverhampton - Merry Hill via DudleyNational Express West Midlands
82 - Wolverhampton - Dudley via BilstonDiamond Bus
82 - Wolverhampton - Dudley via Bilston, CoseleyNational Express West Midlands
210 - Wolverhampton - Gatwick Airport (South)National Express Airport
325 - Manchester - BirminghamNational Express
328 - Blackpool - PlymouthNational Express
333 - Blackpool - BournemouthNational Express
387 - Blackpool - BirminghamNational Express
410 - London - WolverhamptonNational Express
415 - London - WolverhamptonNational Express
420 - London - ShrewsburyNational Express
422 - London - BurnleyNational Express
529 - Walsall - Wolverhampton via WillenhallNational Express West Midlands
530 - Wolverhampton - Rocket Pool via BilstonDiamond Bus
530 - Wolverhampton - Rocket Pool via BilstonBanga Buses
545 - Wolverhampton - Bilston via MoseleyBanga Buses
675 - Wolverhampton - Minehead (Butlins)National Express
711 - Wolverhampton - Compton Park SchoolsNational Express West Midlands
712 - Highfields School - Wolverhampton via Penn FieldsNational Express West Midlands
713 - Wolverhampton - Compton Park SchoolsNational Express West Midlands
763 - Regis School - Wolverhampton via NewbridgeNational Express West Midlands
877 - Stafford > Church Eaton > Wheaton Aston > Brewood > Coven > WolverhamptonSelect Bus Services
877 - Stafford - Church Eaton - Brewood - WolverhamptonSelect Bus Services
878 - Stafford > Penkridge > Wheaton Aston > Brewood > Coven > WolverhamptonSelect Bus Services
878 - Stafford - Penkridge - Brewood - WolverhamptonSelect Bus Services
891 - Wolverhampton - Albrighton - Shifnal - TelfordBanga Buses
MM1 - Birmingham - WolverhamptonWest Midlands Metro
SW - Norwood Green - WolverhamptonNew Bharat Coaches (Southall, London)
WU1 - Wolverhampton - Telford Campus - TelfordWolverhampton University Bus
X8 - Birmingham - Wolverhampton via Blackheath, DudleyNational Express West Midlands

Walking, Cycling and Disabled Access:
As previously mentioned the principal shopping area in Wolverhampton is pedestrianised. Access is limited to buses and taxis along the eastern thoroughfares including Market Street and Garrick Street, as well as on Victoria Street to the west and on Lichfield Street to the north. The city centre has good way finding through signage with clear directions to specific places and venues.

Figure 9: **Wolverhampton City Centre: Wayfinding**

Source: © Lambert Smith Hampton

In addition at the time of our site visit we also observed bike sharing facilities across the city centre. 'Nextbike' cycles and docking stations were observed (amongst others) outside the Civic Centre, at St Peter's Square; outside the new market, in Cleveland Street; outside Sainsbury's superstore on the Ring Road. However to note that at the time of finalising this study in March 2020 this scheme, run by the Combined Authority, has been discontinued, with the Nextbikes being removed

Figure 10: Wolverhampton 'Nextbike' Docking

Source: © Lambert Smith Hampton

Whilst we are not aware of any recent pedestrian counts for the city centre, based on anecdotal available data, the broad scale of visitation shows:

- The Mander and Wulfrun shopping centres, in the city centre attract over 26 million visitors each year[4]; and
- The sales particulars for the Wulfrun Centre, provides that the centre has annual footfall of 9,000,000[5].

The above clearly indicates a high rate of visitation to the main managed retail offer across the city centre. Correspondingly it can be inferred that a proportion of this will have passed through other retail areas of the centre.

Furthermore, the 'Westside Link' proposal represents a £15 million major redevelopment plan that will see the majority of Wolverhampton city centre's main streets, public squares and open spaces given a major overhaul. It will limit traffic flow throughout the city by removing existing roadways in favour of pedestrianised areas, getting rid of 'unnecessary' street furniture and signage, and creating 'uncluttered' paved areas - including a new public plaza.

[4] https://wolverhampton.moderngov.co.uk/documents/s15288/Stronger%20City%20Economy%20Scrutiny%20Visitor%20Economy%20V2%202.pdf
[5] https://www.fhp.co.uk/shoppingcentres/the-wulfrun-shopping-centre-wolverhampton

The Westside Link proposal forms part of the city's 'Connected Places' strategy that seeks to limit traffic flows through the city centre core, providing an opportunity to create a series of safe and attractive spaces to allow the city to host a variety of events.

Throughout the city centre disability access has been considered as part of the pedestrianisation and public realm improvement process. Dropped kerbs were observed allowing wheelchair and mobility access at road intersections and pedestrian crossings. Additionally, there are disabled bays at the various car parks listed (see previous) as well as on-street disabled car parking spaces. It is noted that pedestrian crossings have audible sensors for the disabled, elderly and visually impaired.

Within the shopping centres The Shopmobility store is located in the Wulfrun shopping Centre (facing Cleveland Street). This provides manual and powered wheelchairs and scooters to help people with limited mobility shop and use city centre facilities.

Perception of Safety and Occurrence of Crime

At the time of our site visit we found the town centre to be safe and secure during the day. Security patrols were observed both on the inside and outside of the Wulfrun and Mander Shopping centre(s). The city centre is also covered by CCTV and cameras were also observed at the train and bus stations as well as at key traffic junctions. Public surveillance via CCTV is also linked to a team of 5 City Ambassadors (created by the Wolverhampton BiD), Police, Police Community Support Officers (PCSO's), transport interchanges, the Mander Centre and security staff. Additionally there is also the 'City Radio link' that connects over 110 businesses. These tools and partnerships enable good understanding of the movement of people including any anti-social behaviour within the city.

A review of crime data from the West Midlands police shows that the area that covers the city centre shows a declining rate of all crime since the peak in December 2017.

Figure 11: Crime Statistics 2016 – 2019

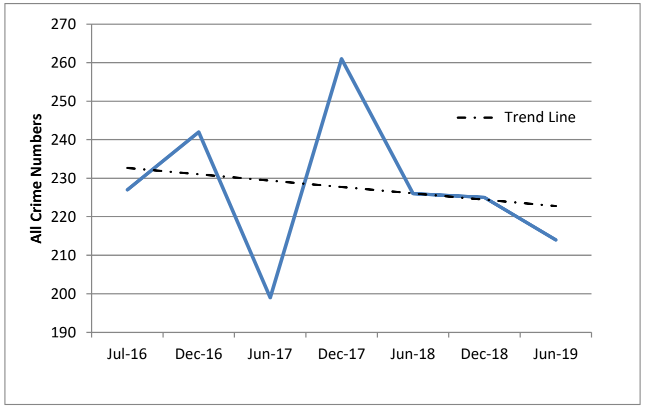


Figure 12: Crime: Area of Coverage

The Wolverhampton BiD has recently invested in a facility termed 'Late Night Safe Haven' at the City Info Shop on Victoria Street that provides a safe environment to to wait for a licensed taxi after a night out in the city centre. This facility is promoted across local licensed venues and seeks to reduce night time anti-social behaviour. Finally, whilst there are a number of boarded properties spread across the centre there is no agglomeration of units of significance (except for a cluster of units at the intersection of Lichfield Street and Princess Street) to create a negative perception in terms of safety.

Lambert Smith Hampton

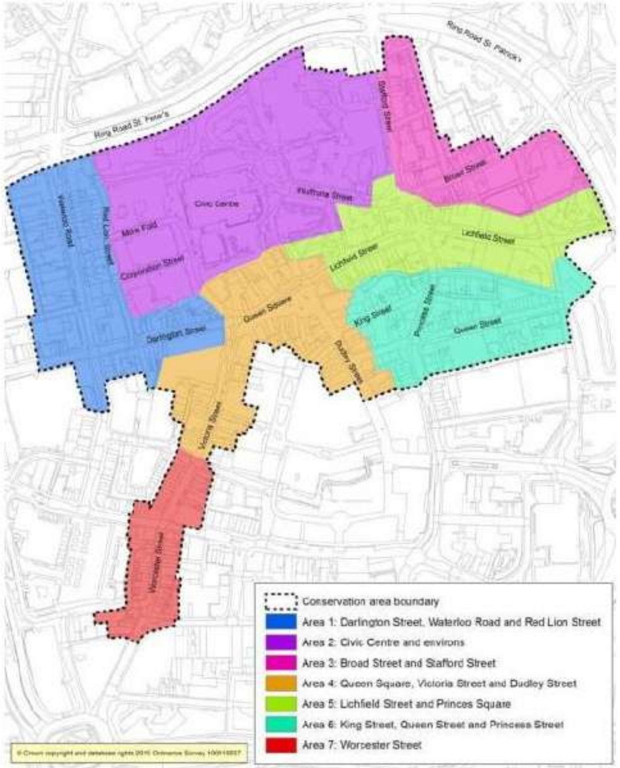
Commercial Rents

Agent sources estimate that Prime Zone A rents in Wolverhampton currently range between £431/sqm (£40/sq ft) to £861/sqm (£80/sq ft) depending on location. The prime pitch is centred on Dudley Street where the higher level is likely to be achieved.

Environmental Quality

A large proportion of the town is designated as a Conservation Area. It covers a large area within the Ring Road - particularly the northern half, with an added southern arm along Worcester Street. This includes the city's historic core around St Peter's Church and Queen Square, but excludes the Mander Centre and the Wulfrun Centre.

Figure 13: Wolverhampton City Centre: Conservation Area Boundary



Source: https://www.wolverhampton.gov.uk/sites/default/files/pdf/Conservation_Area_Management_Plan.pdf

The city centre therefore benefits from heritage assets and buildings of historic significance. The environmental quality of the town centre is good with no signs of litter; fly tipping and sporadic incidences of graffiti. The improvements to the public realm particularly paving and planting create a pleasant shopping environment. This is further aided by the BiD that has a dedicated street cleansing programme to remove litter and detritus.

Figure 14: **Wolverhampton City Centre: Public Realm**

Source: © Lambert Smith Hampton

Evidence to Barriers to New Businesses and Existing Businesses Expanding

We are not aware of any immediate barriers to entry. A broad review of the local rating list shows that ground floor rateable values for retail premises vary depending on location. For example within the prime pitch of Dudley Street it is in the range of £1,000/sqm; Mander Centre c.£600/sqm to £800/sqm; Wulfrun Centre c.£600/sqm to £800/sqm; Market Street c.£250/sqm to £350/sqm; Victoria Street c.£200/sqm; Cleveland Street £120/sqm to £200/sqm. The higher level of £1,000/sqm together with rents and other fixed costs in owning a physical space may act as a potential barrier particularly to independents.

Additionally, the 700 existing businesses that are part of the Wolverhampton BiD represent a significant set of stakeholders influencing key issues affecting how the city centre operates. By way of example, Queen Street Gateway is benefitting from a heritage Lottery Fund Grant of over £800,000 with the aim of repairing, restoring and repurposing buildings and the associated historic townscape. The City Council is co-ordinating this and the BiD will oversee, monitor and advise on project management and delivery of the grant. There is therefore a collective voice for existing businesses to influence local decisions and to trade effectively.

Separate to the above, and in terms of business finance, the Wolverhampton Independent Retail Loan Fund offers loans from £1,000 to £10,000 to retailers in Wolverhampton who are unable to secure finance from traditional lenders. The Loan Fund is run by BCRS Business Loans in conjunction with City of Wolverhampton Council. In this way it represents an alternative source of securing funding for businesses, particularly smaller scale businesses enabling them, and in turn the local economy, to grow and prosper.

The above indicates that there are a number of initiatives in place for the betterment and promotion of existing businesses in the city centre.

Extent of the Evening Economy

The City of Wolverhampton has a number of cultural facilities, including the Civic Hall and the Grand Theatre which attracts the UK's major touring productions. These facilities are currently undergoing a programme of planned investment

As previously detailed, the Goad data indicates that there are 152 leisure services outlets dominated by 35 fast food and take away outlets, followed by 30 cafes, 21 restaurants, 19 public houses, 12 bars & wine bars and 11 casino & betting offices. A large proportion of these are independent led and spread across the centre. These facilities provide a broad reference for the evening economy.

The new £55m Westside leisure scheme (Council in partnership with Urban & Civic), is set to be anchored by a cinema, other family entertainment facilities, a multi-storey car park and a range of new food and beverage outlets. This development seeks to provide family oriented entertainment prolong dwell times, improve the evening economy and encourage increase leisure spend in the city centre. This will act as a significant attractor to the centre.

Furthermore, a complementary independent food and beverage offer is anticipated to support the Interchange, retail core and civic area. This seeks to add further diversity to the family orientated offer at Westside.

The Wolverhampton BiD has also put together an annual family and live entertainment event: 'Enjoy Wolverhampton Live'. In June 2019 this event drew some 16,000 people in to the city centre.

Wolverhampton BiD, in partnership with the Council, is also presently piloting a 'Night Time Guardian scheme' to promote the evening economy provide additional city centre information, security, control and supervision of private hire vehicles/taxis and reassurance service.

In summary the existing leisure will be supplemented further especially in the form of more family led provision within the new proposed Westside and interchange scheme(s).

Digital Infrastructure

The City Centre has very poor broadband coverage with a significant proportion of the City Centre limited to standard broadband (less than 10MB), with no superfast broadband being commercially available in large areas of the city centre. It is the City's ambition to supporting the rollout of full fibre broadband allowing gigabit speeds 1GB whilst filling the gap in broadband coverage in the City Centre.

Wolverhampton's Digital Infrastructure Strategy (2020) outlines the approach to supporting the rollout of full fibre broadband and 5G technology. The Strategy will connect public sector premises to full fibre broadband whilst exploring ways of facilitating the roll out of full fibre through a 'dig once' approach whereby ducting is laid during highways works and regeneration and through working with developers at build stage through planning. All four Mobile Network Operators have announced the rollout of 5G in Wolverhampton with two already gone live covering areas of the city initially through upgrading existing telecoms equipment including rooftops and masts but going forward through the use of small cell on street furniture. The Council is upgrading to smart street lights could open up opportunities to explore public WiFi in future as well as support the rollout of small cell technology to support the rollout of 5G.

Additionally, electric vehicle charging points are now available across Wolverhampton. The Council in partnership with BP Chargemaster has recently installed points at six locations in the city. Phase One of the project saw charging points installed on Birch Street, Clifton Street Car Park, Market Street, Park Road West, Princess Street Taxi Rank and Red Hill Street. Electric vehicles will benefit from 2 hours free parking when charging. After Phase One, the City of Wolverhampton Council will be working to identify further sites to install additional charging points in the city. It is noted that there is additional provision at the University (Inter-site Car Park rear of George Wallis Building).

Conclusions

Background to the Wolverhampton City Centre health check appraisal

Wolverhampton is a major city forming a major part of the Black Country and Greater Birmingham region. The city is undergoing a significant change with new investment in a range of sectors that aims to benefit the city centre directly in terms of additional footfall, mixed-use and leisure provision and improvements to the public realm. The city is also a recipient under the government's Future High Streets Fund. It therefore represents a city that is earmarked for future growth.

Sub-regional shopping hierarchy

The city is within the top 100 centres in the UK and is therefore a centre of strategic importance. Coupled with the wide range of investment and range of proposed uses that is either planned, or underway, the centre is anticipated to reaffirm its significant role in the hierarchy of the Black Country centres.

Diversity of main town centre uses

The diversity of uses analysis indicates below average representation across all categories of goods and services except for financial services where the provision is marginally higher (10.9% vs 10%).

Retailer Representation

The retailer representation across the centre is dominated by the independent sector and it is important to maintain the current level of multiple retailers to retain the attraction and vitality of the centre. The typical size and type of unit also lends towards the independent sector. There is currently demand from 17 operators with a total requirement of between 6,666 sq m (71,750 sq ft) and 15,203 sqm (163,650 sq ft). This includes, inter alia, Aldi (929+ sqm), Lidl (up to 2,787 sqm) as well as Hollywood Bowl (Use Class D2 – up to 2,787sqm) and Simply Gym (Use Class D2 – up to 1,858 sqm).

Proportion of vacant street level property

Both the Goad data and the Council's own monitoring data indicates a c. 20% vacancy rate which is high in the context of the current provision in the centre.

Customer's views and behaviour

Respondents indicated the main improvements include enhancing the retail offer as well as parking and quality of the environment. Additionally, safety and security is also raised as an issue.

Pedestrian flows
Good pedestrian footfall was observed during the daytime.

Accessibility
The city centre is highly accessible by all modes of transport High Street is highly accessible both by road and public transport. This is set to be enhanced further with the Interchange transport hub regeneration programme to link national rail, metro and bus services.

Perception of safety and occurrence of crime
The city centre is covered by CCTV cameras and crime data indicates a declining rate. There are also other initiatives via the BiD that seek to mitigate night time anti-social behaviour such as the 'Late Night Safe Haven' initiative.

Commercial rents on non-domestic property
Prime Zone A rents in Wolverhampton currently average between £431/sqm (£40/sq ft) to £861/sqm (£80/sq ft) depending on location.

State of the environmental quality
In broad terms the environmental quality of the city centre is good. The centre benefits from significant and recent investment in the public realm. The BiD also that has a dedicated street cleansing programme to remove litter and detritus. The combined effect of these creates a pleasant city centre environment.

Digital infrastructure in Wolverhampton City Centre
The Council is upgrading to smart street lights could open up opportunities to explore public WiFi in future as well as support the rollout of small cell technology to support the rollout of 5G.

Strengths of Wolverhampton City Centre

- Good mix of national multiples and independent retailers, and outdoor market.
- Strong independent led retailer representation.
- There is latent interest from a wide range of operators seeking representation in the centre.
- The city centre is highly accessible with a good level of connectivity which is set to be enhanced further with the Interchange transport hub regeneration programme.
- The city centre benefits from a BiD which acts as a key collective stakeholder and central voice for the centre.

- The absence of motor vehicles in the pedestrianised parts of the city centre help to create a safe and pleasant shopping environment.
- There is good provisioning for all types of parking including provision for disabled parking.
- City centre benefits from good environmental quality that has been enhanced through public real improvements.
- Partial 5G coverage of the city centre and further rollout planned.

Weaknesses of Wolverhampton City Centre

- High vacancy rate.
- Below average representation across the majority of goods and service provision.

Opportunities within Wolverhampton City Centre

- There are several major investment and regeneration opportunities underway within the city centre.
- Opportunity to increase cycle ridership.
- Prospect to provide high density uses which would aid in increasing footfall and patronage of the centre’s facilities.
- There is the potential to attract more visitors in the afternoon and evening.
- Opportunity to increase more family oriented evening economy.
- Continue to improve on the perception of safety across the centre.
- Opportunity for "5G” rollout.

Threats to Wolverhampton City Centre

- Rising vacancy rate not being addressed.
- Competition from other destinations such as Merry Hill.
- Further loss of key multiples and stagnation of the retail and wider economy.
- Lack of commercially available fast broadband.

Appendix 2: Brierley Hill

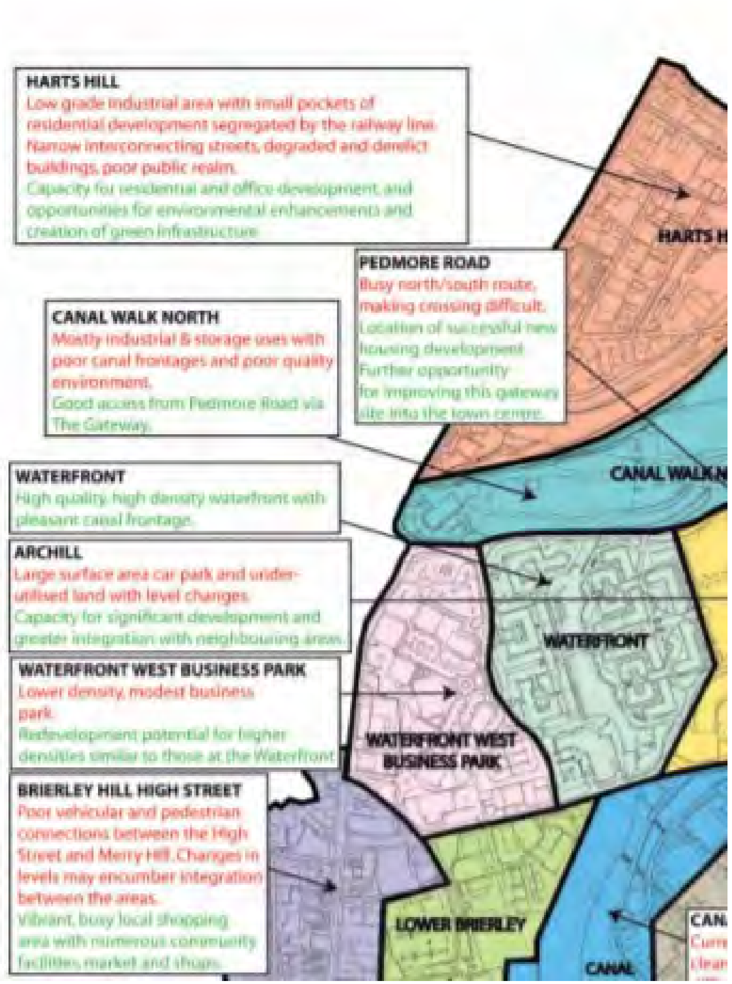
Brierley Hill High Street Health Check Appraisal

The health check covers the following aspects:

- Sub-regional shopping hierarchy
- Diversity of main town centre uses
- Proportion of vacant property
- Customer's Experience and behaviour
- Retailer representation / Balance between independent and multiple stores
- Pedestrian footfall
- Accessibility
- Perception of safety and occurrence of crime
- Commercial rents
- Environmental quality
- Extent to which there is evidence to barriers to new businesses and existing business expanding
- Opening hours / availability / extent to which there is an evening and night time economy offer
- Digital facilities in Brierley Hill High Street

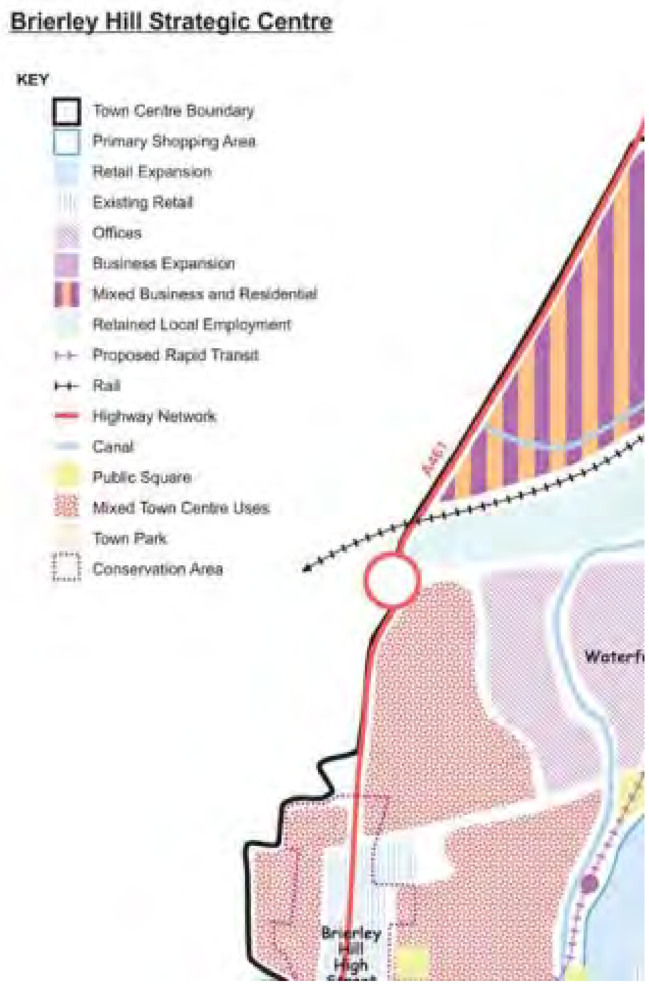
To note that this assessment refers specifically to the Brierley Hill High Street area. It is noted that the town centre boundary for Brierley Hill covers a wider area that encompasses the Merry Hill Shopping Centre and the Waterfront (see below). However, this assessment is specific to the High Street and as it represents the adjacent residential community's local shopping area as part of the wider strategic centre.

Figure 1: Brierley Hill Strategic Centre: AAP



Source: Brierley Hill Area Action Plan, Page 2

Figure 2: Brierley Hill Strategic: Core Strategy



Source: Black Country Core Strategy (2011); Appendix 2

Most recently, Brierley High Street has been successfully shortlisted to receive funding under the government's Future High Streets Fund (FHSF). The bid focuses on a £16m of funding to breathe new life into Brierley Hill High Street to encourage the introduction of more housing to the High Street; an improvement programme for older heritage buildings; improve transport infrastructure and bring in new investment to the town. The council has been allocated a £150,000 resource funding grant by the Ministry of Housing, Communities & Local Government (MHCLG) to help develop a full business case (as at August 2019).

Sub-Regional Shopping Hierarchy

Table 1: Sub-Regional Shopping Hierarchy

VENUE	SCORE (2016/17)	Local Planning Authority	Venuescore Location Grade (2016/17)	2016/17 Rank
Merry Hill Shopping Centre	219	Dudley MBC	Regional	62
Wolverhampton	189	City of Wolverhampton Council	Regional	92
Walsall	172	Walsall Council	Regional	115
West Bromwich	129	Sandwell MBC	Sub-Regional	186
Dudley	60	Dudley MBC	Major District	492
Brierley Hill	30	Dudley MBC	District	1074

Source: Venuescore 2016-17 UK Shopping Venue Rankings (Javelin Group)

In terms of the Venuescore data, Brierley Hill is considerably lower ranked than the purpose built Merry Hill shopping centre. Its low ranking is reflective of its current retail offer, type of units and size especially in comparison to other strategic centres in the BCLA.

A historic review of the rankings indicates that its ranking has dropped by 280 places since 2010.

Lambert Smith Hampton

Table 2: Sub-Regional Hierarchy: Historical Review

VENUE	SCORE (2016/17)	Local Authority	Location Grade (2016/17)	2016 Rank	2014 Rank	2010 Rank	Change 2010 –2016
Merry Hill Shopping Centre	219	Dudley	Regional	62	60	44	-18
Wolverhampton	189	Wolverhampton	Regional	92	68	49	-43
Walsall	172	Walsall	Regional	115	116	143	+28
West Bromwich	129	Sandwell	Sub-Regional	186	161	238	+52
Stourbridge	72	Dudley	Major District	390	468	498	+108
Brierley Hill	62	Dudley	District	1074	989	794	-280
Dudley	60	Dudley	Major District	492	414	345	-147
Halesowen	57	Dudley	Major District	520	456	373	-147
Bilston	41	Wolverhampton	District	754	674	628	-126
Oldbury	37	Sandwell	District	847	966	976	129
Smethwick [Bearwood Rd]	37	Sandwell	District	847	768	*	N/A
Rowley Regis, Blackheath	34	Sandwell	District	937	989	1050	+113
Bloxwich	32	Walsall	District	1008	935	902	-106
Tipton, Great Bridge	28	Sandwell	Minor District	1140	1792	*	N/A
Wednesbury	27	Sandwell	Minor District	1187	1061	976	-211
Aldridge	26	Walsall	Minor District	1233	1167	1139	-94
Brownhills	26	Walsall	Minor District	1233	1257	1096	-137
Smethwick, Windmill SP [Cape Hill]	23	Sandwell	Minor District	1368	1257	458	N/A
Willenhall	26	Walsall	Minor District	1233	1021	1377	+144
Wednesfield	21	Wolverhampton	Minor District	1481	1257	936	-545
Cradley Heath	21	Sandwell	Minor District	1481	1406	*	N/A
Darlaston	15	Walsall	Local	2021	1895	628	-1393

Source: Venuescore 2016-17, 2014-15 and 2010-11 UK Shopping Venue Rankings (Javelin Group); * = comparable data not available

Lambert Smith Hampton

Photographs of Brierley Hill Centre


Memories
01384 88366
07947 581346
TAN-TRUMS
TANNING & BEAUTY SALON


CIDER
TO LET
ALL ENQUIRIES

Lambert Smith Hampton

Diversity of Main Town Centre Uses

Table 3: Number of Units in Brierley Hill High Street

Category	No.	%	UK (2019)
Convenience	23	12.8	9.2
Comparison	44	24.4	29.5
Retail Service	23	12.8	15.0
Leisure Service	43	23.9	24.4
Financial and Business Service	11	6.1	9.9
Other Retail	0	0.0	0.1
Vacant	36	20.0	11.7
Total	**180**	**100%**	**100%**

Source: Experian Goad Category Report, April 2018

Table 4: Composition of Floorspace in Brierley Hill High Street

Category	Sq.m	%	UK (2019)
Convenience	9,708.3	22.9	15.4
Comparison	9,708.3	22.9	33.8
Retail Service	2,434.0	5.7	7.0
Leisure Service	13,814.6	32.6	25.5
Financial and Business Service	1,495.7	3.5	7.4
Other Retail	0.0	0.0	0.1
Vacant	5,267.6	12.4	10.4
Total	**42,428.5**	**100%**	**100%**

Source: Experian Goad Category Report, April 2018

Convenience Good Units

There are 23 convenience units according to the 2018 Goad survey representing 12.8% of the total number of outlets and above the national average of 9.2%. Also in terms of convenience goods floorspace it ranks above the national average (22.9% vs 15.4%). Brierley Hill High Street has a number of key convenience retailers including an Asda Superstore, Iceland and Farmfoods. According to Goad there are 7 convenience stores, 4 Convenience Tobacco Newsagent (CTN) outlets, two frozen food outlets, a baker & confectioner, a market, two butchers, a greengrocer, two heath food outlets, one market, one supermarket and two off license outlets.

Comparison Good Units

According to the 2018 Goad Category Report, there are 44 comparison goods retailers located within Brierley Hill High Street trading from a total floorspace of 9,708 sqm. The number of outlets represents 24.4% of total units in the centre, which is below the national average of 29.5%. The current floorspace provision represents 22.9% of total floorspace in the centre, which is significantly below the national average of 33.8%.

In terms of its overall non-food provision the key headlines are:

- There is an over provision of charity shops (8). This is equivalent to 4.4% of total outlets compared with national average of 2.7%.
- Overprovision by outlets is also seen across the categories of 'electrical and other durable goods' (3 units - 1.7% vs 1.1% nationally); 'florists' (2 units - 1.1%

vs 0.6% nationally); 'footwear' (2 units - 1.1% vs 0.9% nationally); 'furniture general' (3 units - 1.7% vs 0.8% nationally); 'hardware and household goods' shops (5 units - 2.8% vs 1.3% nationally); 'textile & soft furnishing' (2 units - 1.1% vs 0.6% nationally).

- Multiple brands include Poundland Savers, Home Bargains and Card Factory. The independent offer is characterised by small stores selling a variety of goods including a florist, wedding dresses, footwear and carpets.
- There is no representation across a range of comparison goods categories including: childrenswear & infantswear, menswear & accessories, clothing (general), gardening and equipment stores, leather and travel goods, office supplies or vehicle accessories.
- Under representation is seen in the categories of 'crafts, gifts, china and glass' (0.6% vs 1.6% nationally); 'jewellery, watches & silver' (1.1% vs 1.5% nationally); ladies & menswear accessories (0.6% vs 1.6% nationally); 'toiletries, cosmetics & beauty products' (0.6% vs 1.0% nationally); 'toys, games & hobbies' (0.6% vs 0.7% nationally).

In summary, we consider the proportionately lower quantum of comparison goods floorspace is reflective of the larger choice and provision at the nearby Merry Hill Shopping Centre. The current provision serves to satisfy the High Street's immediate local catchment.

Service Provision

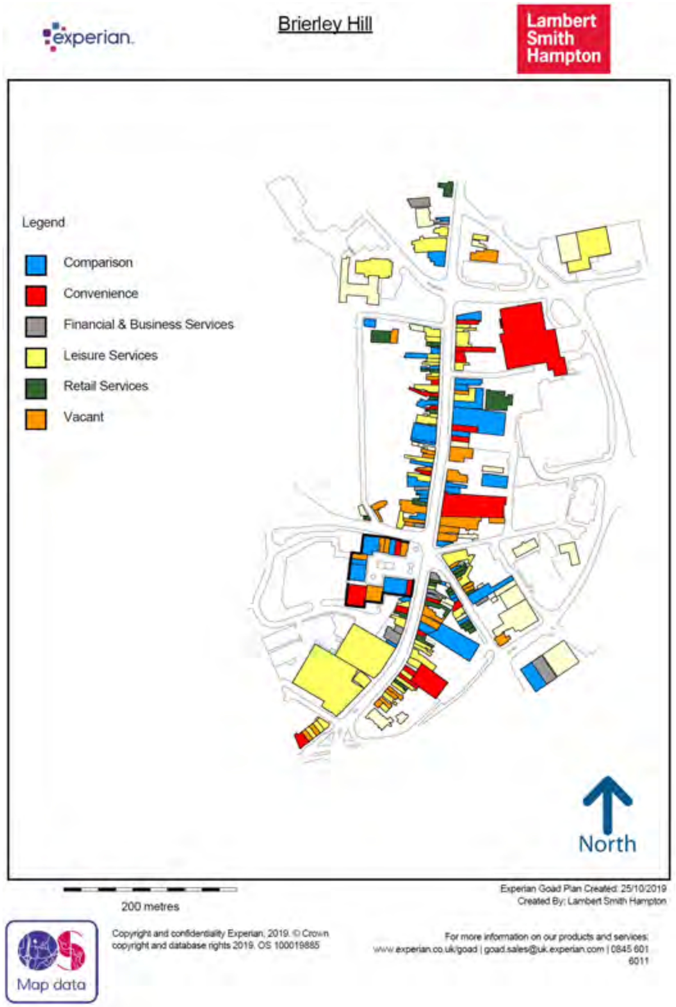
Service businesses are defined by Experian Goad as including retail, professional and financial services and leisure services. As Table(s) 1 and 2 and show that in combination these categories comprise 77 service outlets. These represent 42.8% of all units which is below the national average of 49.4%. However, the associated floorspace provision of 41.8% is higher than the national average (39.9%).

The following provides a brief summary of provision in the different service categories:

- There are 23 **retail services**, which account for 12.8% of total outlets. This is below the national average of 15%. This category is mostly made up of health and beauty outlets (18 units); opticians (2 units), vehicle repair (2 units).
- With reference to **financial and business services**, there are 11 outlets, which represent 6.1% of total units which is below the national average of 9.9%. This category comprises 4 property services units, 1 retail bank unit, 1 legal services unit, 1 financial services unit, 1 building society unit, 1 building supplies unit and 2 other business services units.
- There are 43 **leisure services** outlets which represent 23.9% of total provision and is marginally lower than the national average 24.4%. In terms of floorspace this stands at 32.6% which significantly higher than the national average of 25.4%. Leisure provision is dominated by 16 fast food and take away outlets, followed by 6 restaurants, 5 cafes, 4 public houses, 3 bingo and amusement outlets, 3 sports & leisure facilities, 2 casinos & betting offices, 2 clubs, 2 disco/dance/nightclubs. There are no bars & wine bars, cinemas or theatres or hotels/guest houses. The provision of these outlets is independent led and spread across the centre. Commercial leisure is seen in the form of the Mecca Bingo outlet and Coral betting at opposite ends of the High Street.

- In summary, we consider there low service provision for retail and financial services but a strong leisure service provision. The latter is dominated by fast food and take-away provision.

Figure 3: Diversity of Uses: Brierley Hill High Street

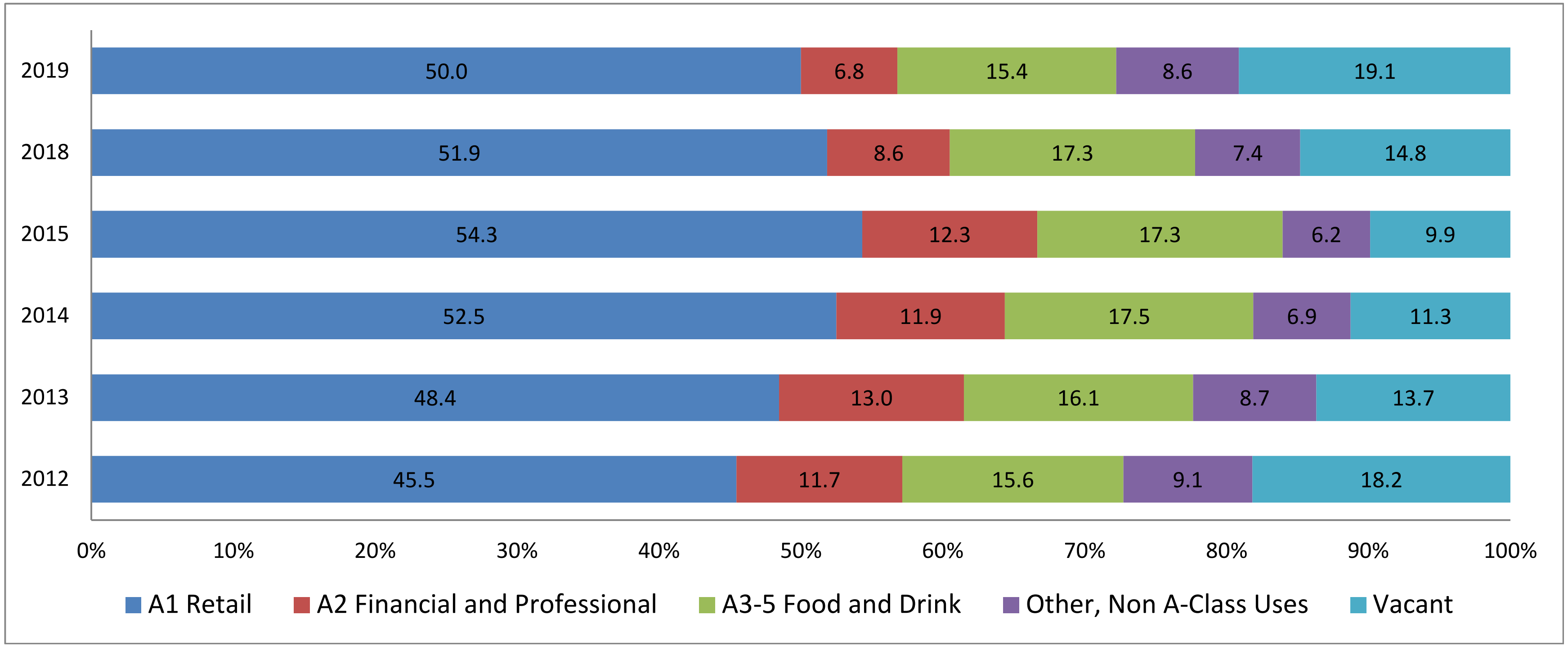


Proportion of Vacant Street Level Property

The 2018 Goad data indicates that Brierley Hill has 36 vacant outlets. This represents a vacancy level of 20%, which is considerably higher than the national average of 11.7%. The vacant floorspace comprises 12.4 of total floorspace which is again higher than the national average of 10.4%.

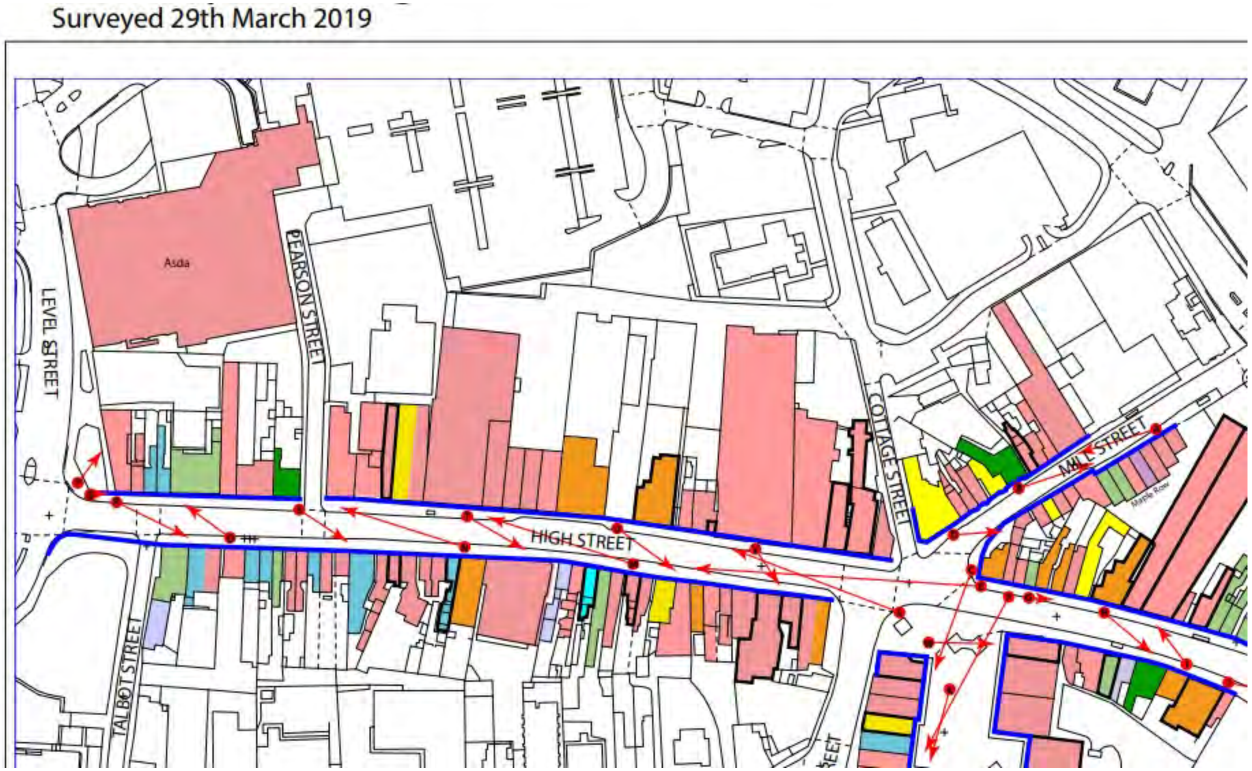
Analysis of the Council's own monitoring information (aligned to the Council's defined area of Brierley Hill High Street and based on classifying units by Use Class) shows that over time the vacancy levels have increased and at April 2019 stood in the region of 19.1% which is broadly comparable to that identified in the Experian Goad of 20%.

Figure 4: **Analysis of Dudley MBC Healthcheck Data for Brierley Hill High Street**



It is observed that the vacant units are spread across the centre with no identified clusters.

Figure 5: **Brierley Hill High Street: Dudley MBC Area of Healthcheck**



Customers' Experience and Behaviour

The household telephone interview survey (HTIS) asked specific questions on respondents' views and perceptions of their local city or town centre. For those whose centre was Brierley Hill Town Centre, the overwhelming majority of the respondents visited either one day a week (29.6%); monthly (12.9%), frequented every 2-3 days (12.9%) and every two weeks (7.8%). Additionally, 0.7% frequented every 4-6 days a week and 5.5% daily. Only 56% of those who responded never visited the centre.

Of the sample that frequented the centre, some 56% used the centre for household shopping and town centre uses.

In terms of what people 'like' about Brierley Hill Town Centre, the most frequently raised themes are shown below:

Table 5: Brierley Hill Town Centre: Top 'Likes'

Response	%
Nothing / Very Little	35.2%
Close to home	32.0%
The street market	7.7%
Good range of non-food shops	5.8%
Easy to get to by bus	5.5%
Close to work	5.4%
Good range of independent shops	4.4%

As the table shows the majority of respondents (who frequented the centre) considered that that there was very little that they liked about the town centre. Notwithstanding this, the proximity to home, the street market and the range of non-food shops and national multiples represent a draw to those that use the centre.

Respondents were also asked what, if anything, they would improve in Brierley Hill Town Centre that might encourage them to visit more. The most frequent suggestions were as follows:

Table 6: Brierley Hill Town Centre: Key Opportunities

Response	%
More national multiple shops / High Street shops	28.5%
(Nothing)	20.6%
More independent shops	19.3%
Cleaner streets	10.6%
Free car parking	10.2%
More / better parking	10.2%
More / better food shops	9.5%
More / better comparison retailers (i.e. non-food shops)	6.9%
More / better town centre events	6.7%
More / better services	5.7%

As the table shows a high proportion of respondents suggest enhancing and providing a better retail offer (more multiple and independent shops; more /better shops; more/better comparison retailers) as well as free / more car parking.

Of those whose nearest centre was Brierley Hill Town Centre but who never visited the centre the top reasons broadly mirrored the improvements i.e. enhancing the retail offer (poor range of shops, poor range of foodstores; poor quality shops; poor range of high street retailers etc); as well as parking and quality of the environment. Additionally the poor range of pubs, bars and cafés is also cited.

Table 7: Brierley Hill Centre: Reasons for Not Visiting

Response	%
Poor range of shops	51.2%
Poor range of food stores	18.3%
Poor quality shops	12.7%
Poor range of 'high street' retailers/ multiples	12.3%
Poor range of independent shops	10.8%
Poor range of non-food shops	9.8%
Poor facilities in general	9.0%
Lack of street market	8.1%
Poor facilities in general	7.3%
Poor range of pubs, cafés or restaurants	7.3%
Not easy to get to by bike	6.8%

Retailer Representation

Multiple retailers act as anchor tenants in a centre and can add to its appeal and create additional pedestrian footfall. Experian Goad produces a list of the top comparison goods retailers, which acts as a measure of the vitality and viability of a centre.

Based on the 2018 Goad Category Report, there are 31 multiple retailers in Brierley Hill out of a total count of 180. This includes fascias such as Savers and Asda. Multiples therefore account for 17.7% of the total units, with independent retail representing the remaining majority of 82.8% of the total units. The independent offer is therefore considered to be strong. The table below illustrates the provision of multiple retail and service outlets and shows over representation of multiples in the convenience and leisure.

Table 8: Category Composition

Category	No. of Outlets	% of Total Outlets	UK Average 2019 (%)
Comparison	12	38.7	42.6
Convenience	6	19.4	11.4
Retail Service	1	3.2	9.4
Leisure Service	9	29.0	22.2
Financial & Business Service	3	9.7	14.4
Total	**31**	**100**	**100.0**

There is a good and complementary mix of multiple and independent retailers, serving the centre and its catchment population. Nonetheless, it will be important to maintain the current level of multiple retailers in order to retain the attraction and vitality of the centre.

In terms of operators seeking representation we have identified that there are three operators with a total requirement of between 1,487 sq m (16,000 sq ft) and 3,902 sqm (42,000 sq ft):

- Lidl (Use Class A1) – requirement of between 929 sqm (10,000 sq ft) and 2,787 sq m (30,000 sq ft);
- Amber Taverns (Use Class A4) - a requirement of 185 sqm (2,000 sq ft); and

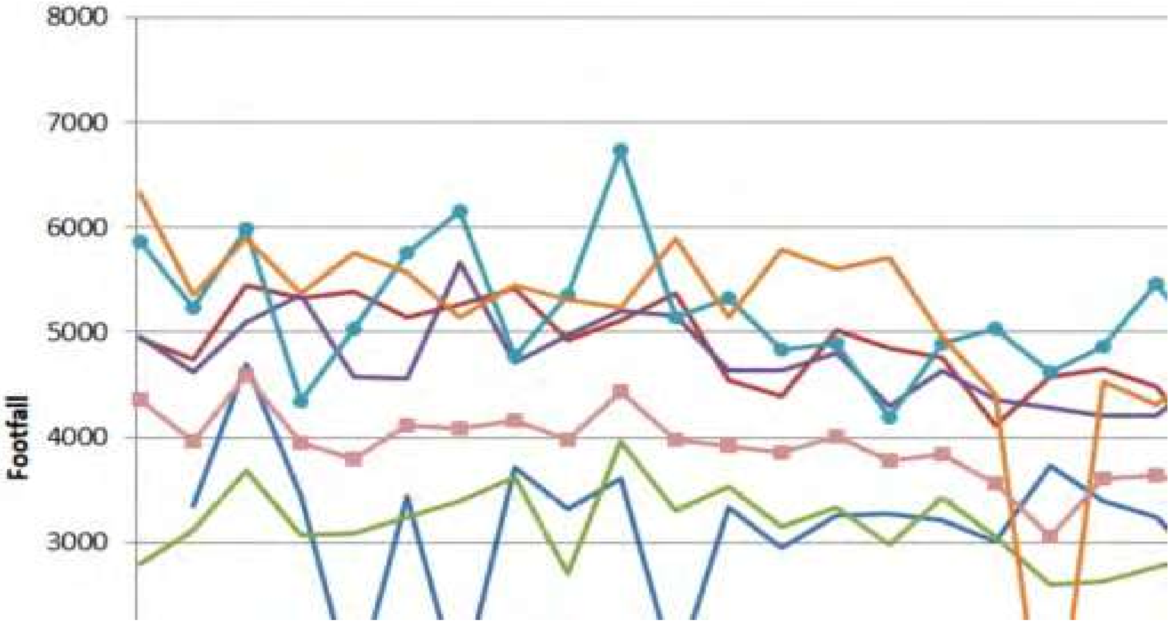
- Snap Fitness (Use Class D2) – a requirement of between 372 sqm (4,000 sq ft) and 929 sqm (10,000 sq ft).

Accessibility and Pedestrian Footfall

Our observation of pedestrian flows indicated a strong flow along The Moor Centre and over the intersection with Moor Street to the High Street particularly towards the library and Home Bargains. Additional significant footfall was observed along takeaways and restaurants leading to Talbot Road and Brierley Civic Hall.

There has not been any recent pedestrian footfall count commissioned. Notwithstanding this, the Council undertook footfall data monitoring over a 6 month period from the start of March 2017 to the end of August 2017. This showed highest usage of the centre on Fridays with below average usage on Wednesday and Monday and particularly Sunday. The single largest drop was seen on a Saturday.

Figure 6: Pedestrian Footfall by Day of Week (2017)



Accessibility

Road Access:
The centre is highly accessible by road and the centre is located along the main A461 road providing connections to Stourbridge and Dudley. The centre is approximately 4km (2.5 miles) south of central Dudley and 3.2km (2 miles) north of Stourbridge.

Car Parking:
Two hours free parking came into effect on 16 April 2018 on Council pay and display car parks, between the hours of 7am and 7pm. This is available in all council-owned car parks and it is part of the Council's drive to boost the number of people visiting town centres and to support local traders.

The current car parking tariff on Council operated car parks is as follows:

Table 9: Car Park Charges

Town Centre Duration Type	Major Short	Minor Short	Major Long	Minor Long
1 hour	Free	Free	Free	Free
2 hours	Free	Free	Free	Free
3 Hours	£2.10	£1.80	£2.10	£1.80
12 Hours	-	-	£3.50	£3.50
Night	£1.10	£1.10	£1.10	£1.10

Public parking provision is provided at the following locations:

- Cottage Street Car Park - 25 spaces (no Disabled Bays) – Long Stay (Tariff type: Major – Long Stay)
- Little Cottage Street Car Park - 78 spaces (6 Disabled Bays) – Long Stay (Tariff type: Major – Long Stay)
- Chapel Street Car Park - 8 spaces (1 Disabled Bay) – Free parking
- Level Street Car Park - 57 spaces (4 Disabled Bays) – Long Stay (Tariff type: Major – Long Stay)
- Bank Street Zones 2 & 3 Car Park - 98 spaces (3 Disabled Bays) – Long Stay (Tariff type: Major – Long Stay)

- Bank Street Zone 1 Car Park - 37 spaces (3 Disabled Bays) – Long Stay (Tariff type: Major – Long Stay)

Data obtained from the Council shows that Little Cottage Street Car Park is well utilised with a peak occupancy of 97% on Thursdays. Level Street follows next with peak occupancy of 63% on Thursdays and Bank Street Zone 1 with peak occupancy of 27% on Thursdays.

Private parking provision is found at:

- Insight House Car park - 50 spaces

Other parking provision is found at:

- Farmfoods Car Park (for customers only) - 80 spaces
- Asda Car Park (for customers only) - 540 spaces
- The Moor Centre – 160 spaces

Additionally there is on-street parking on the High Street which also aids patronage to existing outlets as observed during our site visit. .

In summary there is very good provision of car parking in terms of quantity and type (on-street and off-street) across the centre. This is substantially aided by the two hour free parking provision.

Public Transport:
The centre is well connected particularly with bus stops and along bus routes via Merry Hill to Dudley and Wolverhampton.

Connectivity is likely to improve further with the plans for the Wednesbury to Brierley Hill Midlands Metro Line (part of the HS2 West Midlands connectivity package). We understand the Metro extension has recently moved a step closer with utility investigation works having begun in Dudley signalling the start of works to bring the project to extend the West Midlands Metro from Wednesbury to Brierley Hill via Dudley. The route is expected to operate every six minutes at peak time. This will assist in the potentially bringing in more footfall from surrounding communities.

Table 10:Bus Stops and Services on Brierley Hill Street

Bus Stops in Brierley Hill

Bank St: 2, 2A, 6, 28, X10
Bell St: 226
Church Hill: 6, 886
Civic Hall: 2, 15, 15A
Five Ways: 6, 2, 2A, 15, 15A, 226, 228, 250, , X10
Library: 2, 2A, 6, 15, 15A, 28, 228, X10
The Goss: 28

Bus Service Routes

2 - Dudley - Merry Hill via Russells Hall Hospital (National Express West Midlands)
2A - Dudley - Merry Hill via Russells Hall Hospital (National Express West Midlands)
6 - Dudley - Stourbridge via Russells Hall Hospital (National Express West Midlands)
15 - Wolverhampton - Merry Hill via Wombourne (National Express West Midlands)
15A - Wolverhampton - Merry Hill via Kingswinford (National Express West Midlands)
28 - Halesowen - Stourbridge via Merry Hill (National Express West Midlands)
226 - Merry Hill - Dudley via Kingswinford (Diamond Bus)
228 - Russell's Hall Hospital - Kinver via Merry Hill (Diamond Bus)
250 - Stourbridge - Brockmoor via Merry Hill Circular (Diamond Bus)
251 - Stourbridge - Merry Hill via Brockmoor Circular (Diamond Bus)
886 - King Edward VI Five Ways - Penn (The Green Bus Service)
X10 - Birmingham - Gornal Wood via Halesowen, Merry Hill (National Express West Midlands)

Walking, Cycling and Disabled Access:
The centre is well utilised by the local resident community who travel primarily by bus and car. Whilst there is no dedicated cycling lane, cycle parking stands were observed on the High Street outside the RSPCA Charity Shop. The topography surrounding the High Street is not particularly conducive towards walking especially from surrounding residential communities. In this way public transport represents an important facilitator in encouraging pedestrians to frequent the centre.

In terms of disabled access it was observed that the centre has numerous dropped kerbs allowing wheelchair and mobility access at road intersections and pedestrian crossings. There are also disabled bays at the various car parks listed. It is noted that pedestrian crossings have audible sensors for the disabled, elderly and visually impaired.

Perception of Safety and Occurrence of Crime

At the time of our site visit we found the town centre to be safe and secure during the day. It was noted that there were a number of shop fronts that had shutters down which contributes to negative perception. Notwithstanding this there was a high level of pedestrian activity around the Moor Centre and over the intersection with Moor Street to the High Street towards the library and Home Bargains.

The Moor Centre has a high level of security with CCTV cameras. Further CCTV cameras were seen along the High Street (outside the Home Bargains unit) and at the junction of Bank Street and the High Street.

A review of crime data from the West Midlands police shows that the area that covers Brierley Hill shows a declining rate of all crime since the peak in Jun 2017.

Figure 7: Crime Statistics 2016 – 2019

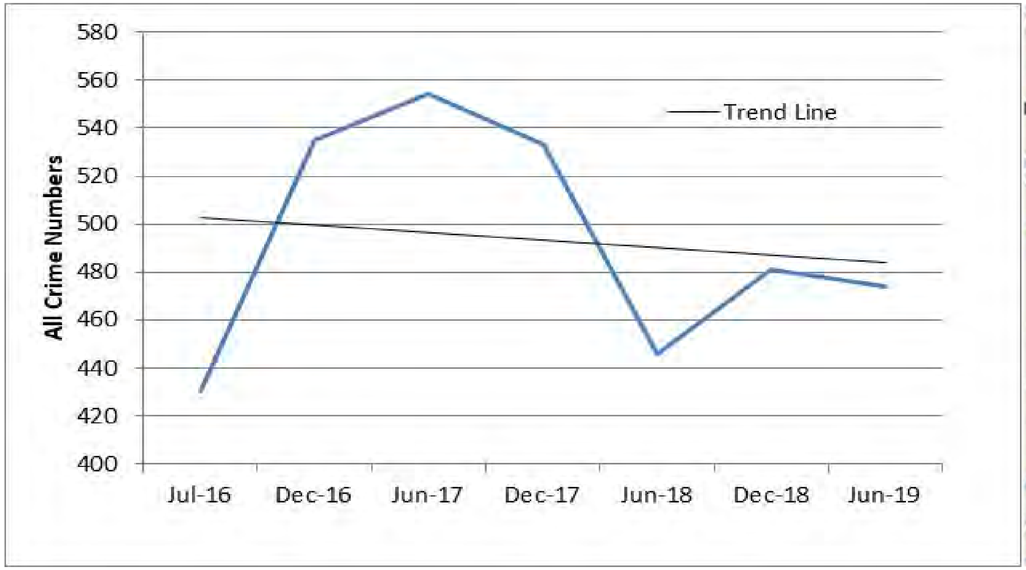


Figure 8: Area of Coverage

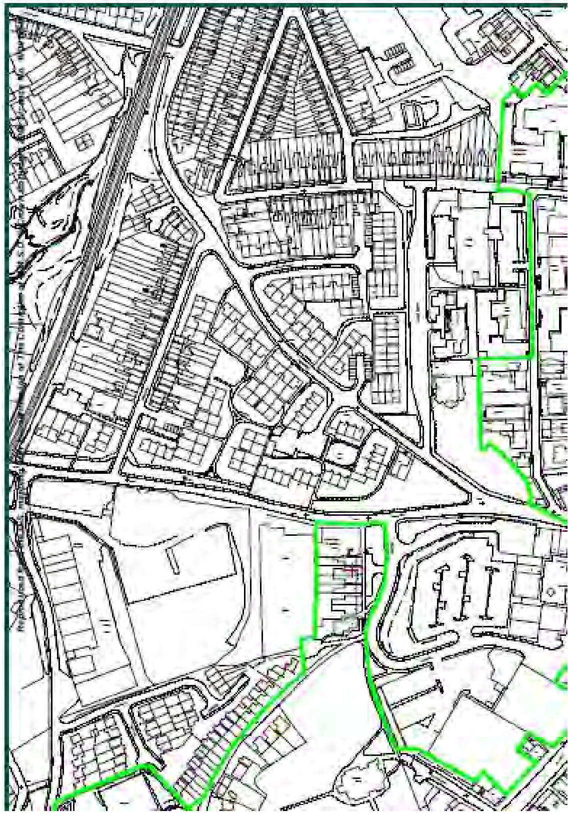
Commercial Rents

Not available.

Environmental Quality - Brierley Hill High Street

A large proportion of the town is designated as a Conservation Area. The High Street benefits from heritage assets. Sporadic planting and greenery was also observed. The Moor Centre provides an area of attractive modern shopping frontages with the remainder of the High Street interspersed with frontages and fascias of variable quality.

Figure 9: Brierley Hill High Street Conservation Area Boundary



There is a definite contrast between the newly built Moor Centre and the rest of the High Street. It is in the latter where the majority of the vacant units prevail and provide a negative perception. The majority of the High Street has architecture of various types associated with units of varying size. These are not necessarily conducive to modern retailer requirements and are suited towards the independent sector. In relation to the latter it was observed that the quality of fascias vary by premises. In terms of the composition of the High Street the appearance of some of the shop frontages are dated and run down and there is observed evidence of buildings neglected or in need of refurbishment and maintenance. Additionally, it was observed that placing of goods outside some retail units encroaches on pavement space which can be obstructive especially to those with mobility impairments.

The High Street also benefits from wide pavements. There was no obvious sign of graffiti at the time of our site visit. Additionally there was no on-street litter and it was observed that litter bins were interspersed along the High Street.

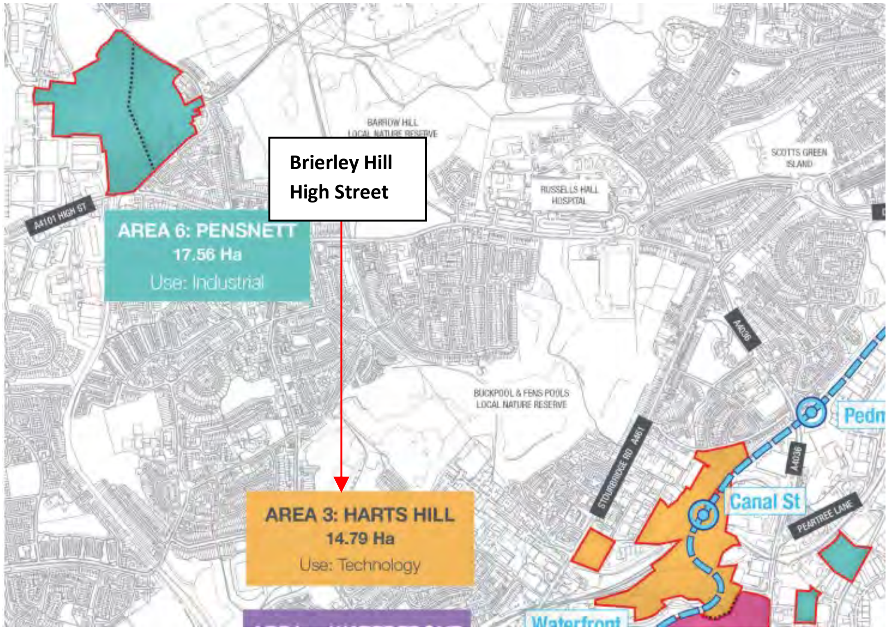
It was also noted that attempts had been made in terms of green planting by the placing of three tiered planters along the high street.

Peak time congestion was observed at the intersection(s) with High Street/Moor Street and High Street / Bank Street / Level Street with the remainder of the High Street having a good flow of vehicular traffic.

Evidence to Barriers to New Businesses and Existing Businesses Expanding

A review of the local rating list shows that for retail premises fronting the High Street the rateable (expressed in price per sqm) the tone varies from £50/sqm to £225/sqm depending on location. As the profile of the centre is very much independent led, the higher level of £225/sqm together with rents and other fixed costs in owning a physical space may be a potential barrier. Furthermore the DY5 Enterprise Zone (EZ) boundary is close to the High Street. The EZ benefits from relief on business rates up to 5 years which is a potential disadvantage to the High Street especially with operators such as office occupiers locating to the EZ. This then the obvious effect of reducing footfall to the High Street.

Figure 10: Brierley Hill High Street in Context of DY5 Dudley's Business and Innovation Enterprise Zone



Source: https://www.dudleybusinessfirst.org.uk/dy5-zone/the-offer/

Extent of the Evening Economy

The High Street has a high proportion of floorspace devoted to leisure services. This is dominated by fast-food and take away outlets, followed by 6 restaurants, 5 cafes, 4 public houses, 3 bingo and amusement outlets, 3 sports & leisure facilities, 2 casinos & betting offices, 2 clubs, 2 disco/dance/nightclubs. The cafes, public houses, cubs and disco/nightclubs provide a broad reference for the evening economy. However these are spread along the High Street and there is no facility or venue providing family entertainment. In broad terms the evening economy is 'functional' and cannot be described as a destination. The extent of provision is also affected by the provision at Merry Hill Shopping Centre and the surrounding facilities which provide a weather proof venue for social interaction, dining and entertainment in the form of facilities such as national casual dining chains and a cinema.

The opening hours of the leisure units on Brierley Hill High Street varies with some trading up to midnight. However the take-aways mostly trade in the evenings with shutters down during the day time that gives a negative perception and does not necessarily aid with footfall generation during the day time.

Digital Facilities

We are not aware of the provision of any central digital facilities such as Wi-Fi infrastructure on the High Street. Additionally we did not observe the provision of any electric car charging points on the High Street. The nearest electric vehicle charging point was observed at the Asda Superstore on Venture Way.

Conclusions

Background to the Brierley Hill High Street health check appraisal
Brierley Hill High Street as a solus entity excluding Merry Hill represents a retail area that serves its immediate hinterland and local community.

Sub-regional shopping hierarchy
Within the context of the sub-regional hierarchy, Brierley Hill High Street represents a key component of the wider retail mix that serves the wider strategic centre.

Diversity of main town centre uses
The diversity of uses analysis indicates over representation in convenience provision and under representation in comparison goods. This provides a broad indication of the High Street's functionality that is further supported by a large proportion of leisure service floorspace albeit in the in the form of take-away's, restaurants and public houses.

Retailer Representation
The retailer representation across the centre is dominated by the independent sector and it is important to maintain the current level of multiple retailers to retain the attraction and vitality of the centre. The typical size and type of unit also lends towards the independent sector. There is currently demand from a convenience operator (Lidl) for representation as well as Amber Taverns (Use Class A4) and Snap Fitness (Use Class D2).

Proportion of vacant street level property
Both the Goad data and the Council's own monitoring data indicates a c. 20% vacancy rate which is high in the context of the current provision in the centre.

Customer's views and behaviour
The HTIS shows that respondents seeking a better retail offer, including parking and enhancing the quality of the environment.

Pedestrian flows
Good pedestrian footfall was observed during the day time. The Council's own data shows poor usage during weekends.

Accessibility

The High Street is highly accessible both by road and public transport. This will be enhanced further by the Wednesbury to Brierley Hill Midlands Metro Line HS2 West Midlands connectivity initiative. There is also a large amount of car parking available which is further enhanced by the provision of the two hour free parking that is available across Council owned car parks.

Perception of safety and occurrence of crime

There are CCTV cameras along the High Street and the Moor Centre and the High Street felt safe and secure during the day. Crime data from the West Midlands police shows that the area that covers Brierley Hill shows a declining rate of all crime since the peak in Jun 2017.

Commercial yields and rents on non-domestic property

Not available.

State of the environmental quality

In broad terms the environmental quality of the high street varies from the ‘new’ part comprising the Moor Centre to the more traditional part of the High Street. It is clear that attempts have been made to improve and enhance the environment through wide pavements and provision of planting. These initiatives whilst important are negatively impacted by the presence of vacant units and fascias of varying quality.

Digital facilities in Brierley Hill High Street

There is currently no provision of any central digital facilities such as Wi-Fi infrastructure on the High Street.

Strengths of Brierley Hill High Street

- Important focus for the surrounding residential community.
- Strength of the independent sector.
- Good level of pedestrian footfall.
- Good car parking provision.

Weaknesses of Brierley Hill High Street

- High vacancy rate.
- Fascias of varying quality.
- No real evening economy.

- Environmental quality varies within the centre.
- Proximity to Enterprise Zone.
- No recognisable digital or EV charging provision.

Opportunities within Brierley Hill High Street

- Fostering a collective voice via a Business Improvement District (BiD).
- Identifying the uniqueness and focus for the High Street.
- Establishing a marketing campaign to raise profile of centre.
- Capitalising on the new Wednesbury to Brierley Hill Midlands Metro Line initiative and associated footfall.

Threats to Brierley Hill High Street

- Rising vacancy rate not being addressed.
- Competition from other centres in the local area such as Dudley.
- Loss of multiples from the High Street – any further loses poses a great threat to the centre's future vitality and viability.
- Loss of other commercial function e.g. offices to the Enterprise Zone.

Appendix 3: Merry Hill

Lambert Smith Hampton

Merry Hill Shopping Centre Health Check Appraisal

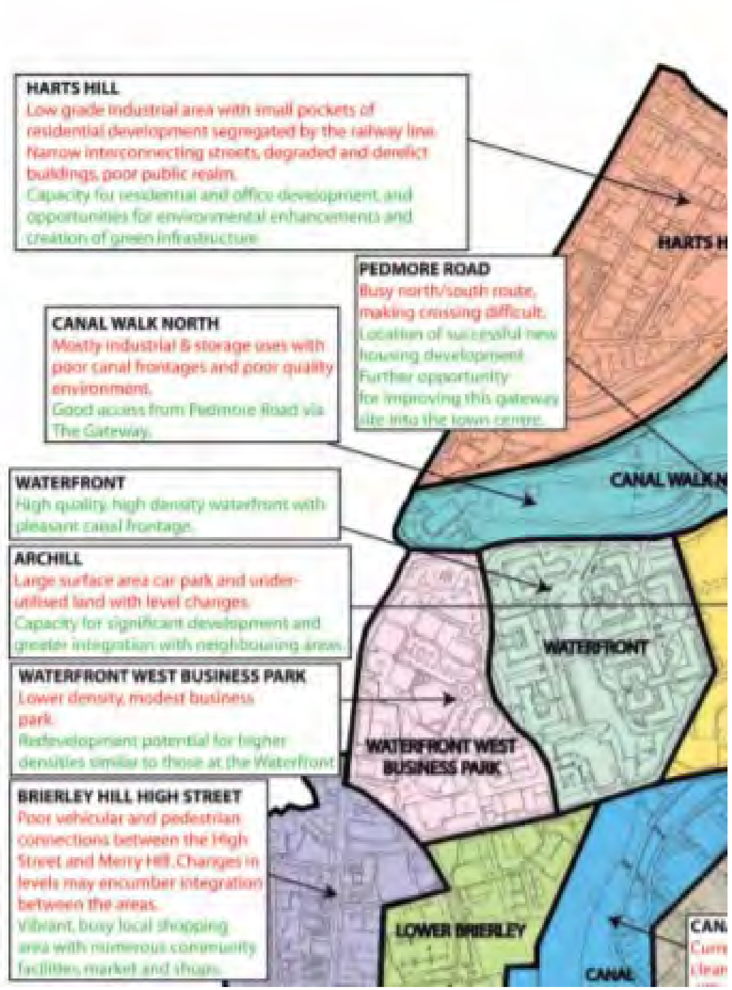
The health check covers the following aspects:

- Sub-regional shopping hierarchy
- Diversity of main town centre uses
- Proportion of vacant property
- Customer's Experience and behaviour
- Retailer representation / Balance between independent and multiple stores
- Pedestrian footfall
- Accessibility
- Perception of safety and occurrence of crime
- Commercial rents
- Environmental quality
- Extent to which there is evidence to barriers to new businesses and existing business expanding
- Opening hours / availability / extent to which there is an evening and night time economy offer
- Digital facilities in Merry Hill SC

To note that this assessment refers specifically to the Merry Hill Shopping Centre (SC) which together with Brierley Hill High Street forms the Strategic Centre. It is noted that the town centre boundary for the strategic centre of Brierley Hill covers a wider area that encompasses the Merry Hill Shopping Centre and the Waterfront, amongst others (see below). From the outset it should be recognised that Merry Hill is a shopping centre of regional significance and its attraction stretches beyond the Black Country sub-region.

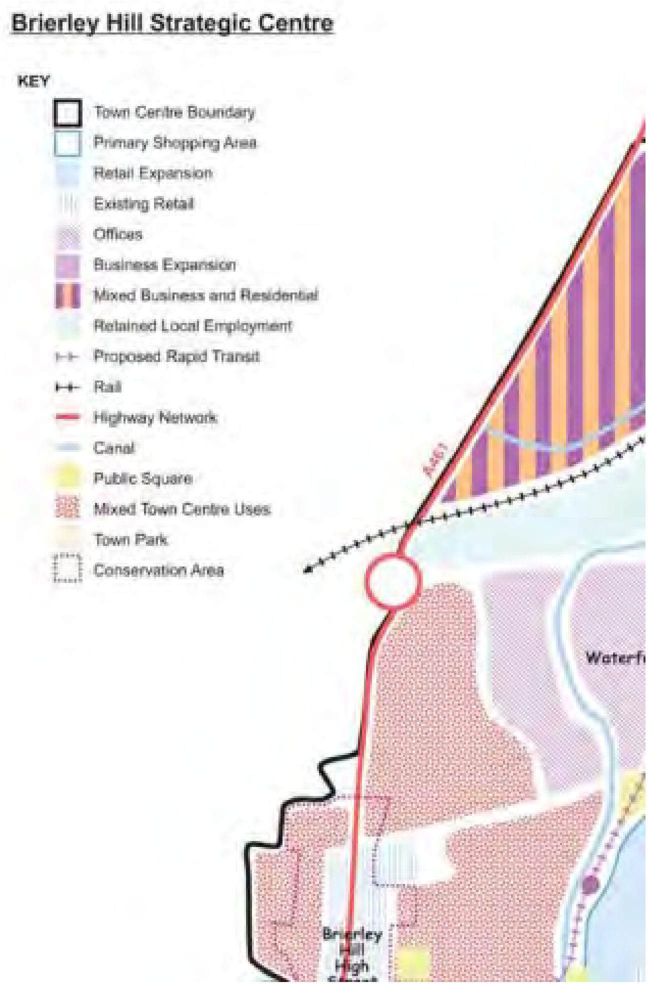
In relation to the Experian Goad data used as part of this assessment, the geographical area covers the shopping centre and the adjacent Merry Hill Retail Park. On this basis the total estimated floorspace is some 154,989 sqm (1,668,300 sq ft).

Figure 1: Brierley Hill Strategic Centre: AAP



Source: Brierley Hill Area Action Plan, Page 2

Figure 2: Brierley Hill Strategic: Core Strategy



Source: Black Country Core Strategy (2011); Appendix 2

Sub-Regional Shopping Hierarchy

Table 1: Sub-Regional Shopping Hierarchy

VENUE	SCORE (2016/17)	Local Planning Authority	Venuescore Location Grade (2016/17)	2016/17 Rank
Merry Hill Shopping Centre	219	Dudley MBC	Regional	62
Wolverhampton	189	City of Wolverhampton Council	Regional	92
Walsall	172	Walsall Council	Regional	115
West Bromwich	129	Sandwell MBC	Sub-Regional	186
Dudley	60	Dudley MBC	Major District	492
Brierley Hill	30	Dudley MBC	District	1074

Source: Venuescore 2016-17 UK Shopping Venue Rankings (Javelin Group)

Merry Hill Shopping Centre is graded as a 'regional' destination in Venuescore's Shopping Venue Rankings and is within the top 100 retail centres in the country. Being a purpose built managed shopping centre its ranking reflects its retail offer, representation and unit size. On this basis it is ranked considerably above the other BCLA strategic centres.

According to the Trevor Wood Retail Database (TWRD) (2019) the total floorspace for the centre is estimated at 101,084 sqm (1,088,066 sq ft) Gross Internal Area (GIA). Based on the TWRD ranking of shopping centres by overall attractiveness, it is ranked 11th (having marginally dropped from its previous ranking of 10th in both 2017 and 2018).

Photographs of Merry Hill Shopping Centre

Source: © Lambert Smith Hampton

Source: © Lambert Smith Hampton

Lambert Smith Hampton

Diversity of Main Town Centre Uses

Table 2: Number of Units in Merry Hill SC

Category	No.	%	UK (2019)
Convenience	11	3.7	9.2
Comparison	157	52.7	29.5
Retail Service	28	9.4	15.0
Leisure Service	49	16.4	24.4
Financial and Business Service	13	4.4	9.9
Other Retail	0	0.0	0.1
Vacant	40	13.4	11.7
Total	**298**	**100%**	**100%**

Source: Experian Goad Category Report, April 2018

Table 3: Composition of Floorspace Merry Hill SC

Category	Sq.m	%	UK (2019)
Convenience	7,515.8	4.9	15.4
Comparison	108,249.7	69.8	33.8
Retail Service	3,065.8	2.0	7.0
Leisure Service	11,380.5	7.3	25.5
Financial and Business Service	2,452.6	1.6	7.4
Other Retail	0.0	0.0	0.1
Vacant	22,324.4	14.4	10.4
Total	**154,988.9**	**100%**	**100%**

Source: Experian Goad Category Report, April 2018

Convenience Good Units

There are 11 convenience units in the area according to the 2018 survey representing 3.7% of the total number of outlets and lower than the national average of 9.2%. Also in terms of convenience goods floorspace it ranks lower than the national average (4.9% vs 15.4%). The lower quantum of floorspace provision is to be expected considering the fact that as a regional shopping centre the key area of provision is in the comparison goods category.

The convenience provision comprises Bakers & Confectioners (6 units), 1 CTN (Convenience, Tobacco, Newsagent Unit), 1 Convenience Store, 1 Health Food Unit, 1 Shoe Repair Unit and 1 Supermarket.

Key convenience fascias at the centre include an Asda, Iceland, Holland & Barrett and Londis.

Comparison Good Units

According to the 2018 Goad Category Report, there are 157 comparison goods retailers located within the shopping centre trading from a total floorspace of 108,250 sqm. The number of outlets represents 52.7% of total units in the centre, which is significantly above the national average of 29.5%. The current floorspace provision represents 69.8% of total floorspace in the centre, which is double the national average of 33.8%.

In terms of its overall non-food provision the key headlines are:

- There is an above average provision in the following comparison goods categories:
  - Ladies wear & accessories (15 units) – equivalent to 5% of outlets and higher than the national average of 1.9%.
  - Telephone & Accessories (13 units) – (4.4% of outlets vs 1.4% nationally)
  - Jewellery, Watches & Silver (11 units) – (3.7% of outlets vs 1.6% nationally)
  - Toiletries, Cosmetics & Beauty Products (11units) – (3.7% of outlets vs 1% nationally)
  - Footwear (10 units) – (3.4% of outlets vs 0.9% nationally)
  - Menswear & Accessories (10 units) – (3.4% of outlets vs 0.7% nationally)
  - Clothing General (9 units) – (3% of outlets vs 1.7% nationally)
  - Toys, Games & Hobbies (8 units) – (2.7% of outlets vs 0.7% nationally)
  - Furniture General (6 units) – (2% of outlets vs 0.8% nationally)
  - Sports, Camping & Leisure Goods (6 units) – (2% of outlets vs 0.7% nationally)
  - Department & Variety Stores (5 units) – (1.7% of outlets vs 0.5% nationally)
  - Greeting Cards (5 units) – (1.7% of outlets vs 0.5% nationally)

In summary, the scale and breadth of comparison goods representation underlies the regional significance of the centre.

Service Provision

Service businesses are defined by Experian Goad as including retail, professional and financial services and leisure services. As Table(s) 1 and 2 and show that in combination these categories comprise 90 service outlets. These represent 30.2% of all units which is below the national average of 49.4%. The associated floorspace provision of 10.9% is also lower than the national average (39.9%).

The following provides a brief summary of provision in the different service categories.

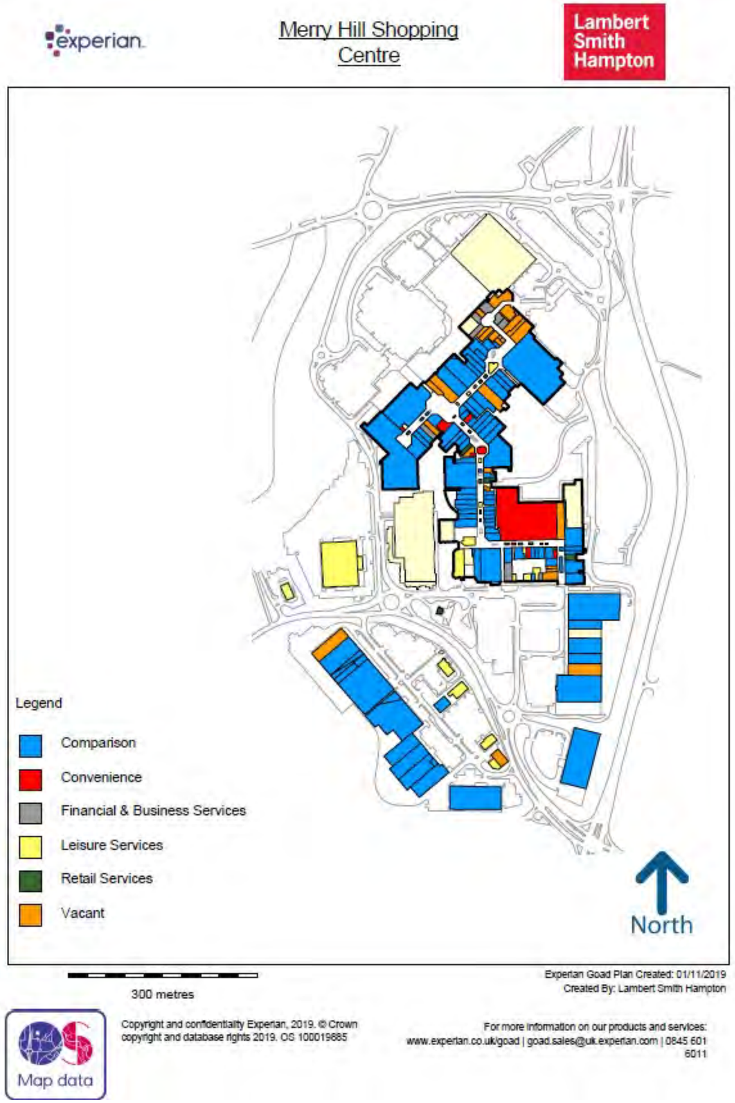
- There are 28 **retail services**, which account for 9.4% of total outlets. This is below the national average of 15%. This category is mostly made up of health and beauty outlets (12 units); opticians (4 units); travel agents (4 units).
- With reference to **financial services**, there are 13 outlets, which represent 4.4% of total units which is below the national average of c.9.9%. This category comprises of 8 retail banks, 3 building societies, 1 building supplies & services and 1 employment and careers unit.
- There are 49 **leisure services outlets** which represent 16.4% of total provision which is lower than the national average 24.4%. In terms of floorspace this

stands at 7.3% which is significantly lower than the national average of 25.5%. Leisure provision is dominated by 18 fast food and take away outlets, followed by 16 cafes, 10 restaurants, 2 casino & betting offices, 1 bingo and amusement outlet, 1 cinema and 1 public house. Commercial leisure is seen in the form of Odeon, Burger King, Frankie & Benny's, McDonalds, KFC, Five Guys, Frankie & Benny's, Hotel Chocolat, Weatherspoon, Krispy Kreme, Nando's, Starbuck's, Subway, Pizza Express, Greggs, Pizza Hut and Costa.

- In summary, there is low service provision for retail and financial services but comparatively stronger leisure service provision. The latter being dominated by a range of national chains including casual dining fascias that are a key footfall attractor to the centre.

Lambert Smith Hampton

Figure 3: Merry Hill Shopping Centre: Diversity of Uses

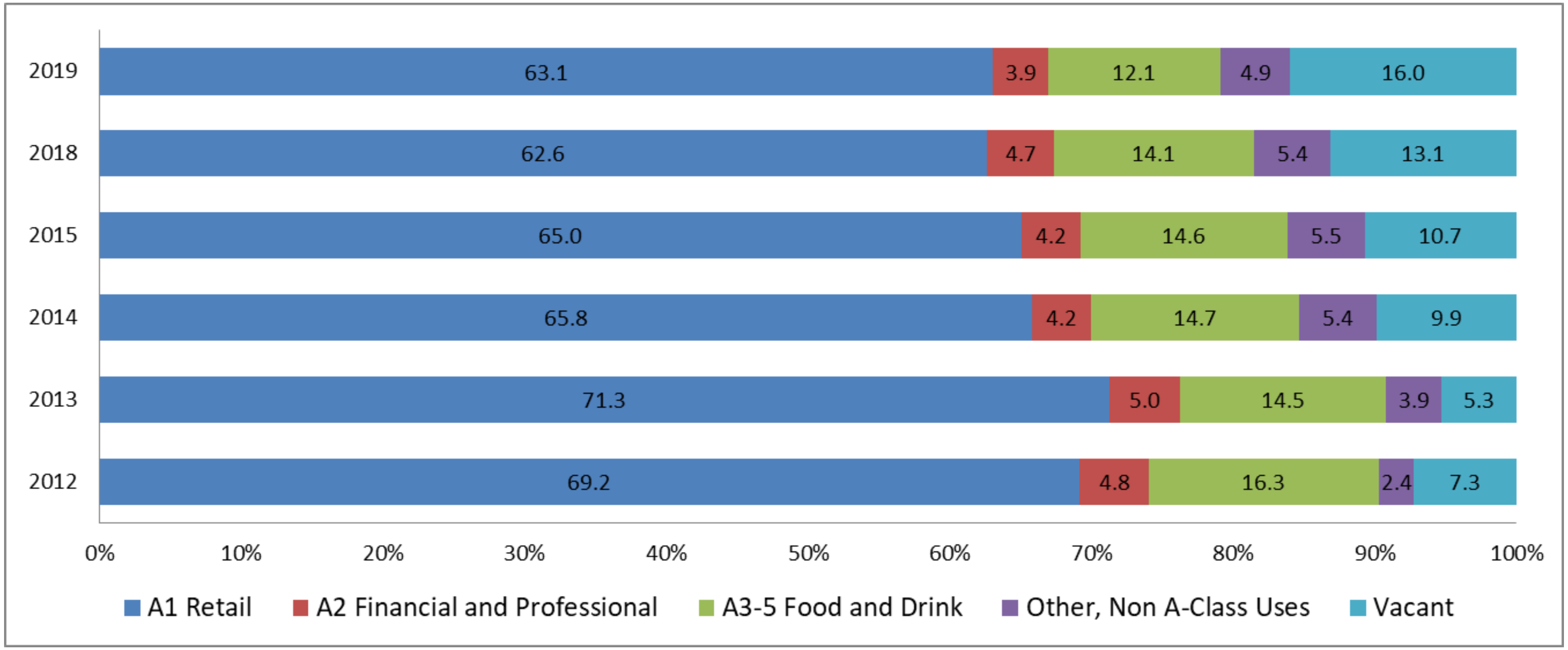


Proportion of Vacant Property

The 2018 Goad data for Merry Hill indicates that there are 40 vacant outlets representing a vacancy level of 13.4%, which is higher than the national average of 11.7%. Vacancies represent 14.4% of total floorspace and is higher than the national average of 10.4%.

Analysis of the Council's own monitoring information (based on Use Class) shows that over time the vacancy levels have increased. The Council's data shows that in 2018 it stood at 13.1% which is comparable to the Experian Goad 2018 figure of 13.4%. The most recent Council survey (April 2019) shows that this has increased to 16%.

Figure 4: Analysis of Dudley MBC Health Check Data for Merry Hill Shopping Centre



The vacant units are spread across the centre with no identified clusters.

Figure 5: **Merry Hill: Dudley MBC Area of Healthcheck**

Customers' Experience and Behaviour

The household telephone interview survey (HTIS) asked specific questions on respondents' views and perceptions of their local city or town centre. For those whose nearest centre was Merry Hill Shopping Centre, the overwhelming majority of the respondents visited either every two weeks (40%); 2-3 days a week (25.4%); Monthly (13.9%); and one day a week (13.7%). Some 6.9% frequent the centre daily.

Of the total sample that frequented the centre some 95.5% used the centre for most household shopping and town centre uses. This is a significant quantum of visitation reflective of the managed nature of the centre.   In terms of what people 'like' about Merry Hill Shopping Centre, the most frequently raised themes are shown below:

Table 4: Merry Hill Shopping Centre: Top 'Likes'

Response	%
Compact	48.52%
Free parking	35.54%
Close to home	21.76%
High quality shops	18.25%
Attractive environment / nice place	13.74%
Close to work	12.98%
(Nothing / very little)	12.81%
Good range of non-food shops	12.41%
Offers undercover shopping	12.41%

Source: HTIS 2019

As the table shows the majority of the respondents (who frequented the centre) considered the compactness, free parking proximity to home, high quality shops and attractive environment as key likes in visiting the centre. Only 12.8% of the respondents that there was very little that they liked about the centre.

Respondents were also asked what, if anything, they would improve in in the Centre that might encourage them to visit more and 75% stated 'nothing' whilst 19.3% stated 'more/better food shops'. Of those whose nearest centre was the Shopping Centre but who never visited the centre the only cited was the centre was 'too far away'.

Merry Hill: Retailer Representation

Multiple retailers act as anchor tenant and add to its appeal and create additional pedestrian footfall. Experian Goad produces a list of the top comparison goods retailers, which acts as a measure of the vitality and viability of a centre.

Based on the 2018 Goad Category Report, there are 200 multiple retailers (67%) out of a total count of 298 outlets. In terms of floorspace this represents 125,186 sq m (1,347,500 sq ft) out of a total of 154,989 sqm (1,668,300 sq ft) i.e. 81% of total floorspace. This includes fascias such as Debenhams, Marks & Spencer, Argos, Boots, TK Maxx, Asda, Next, Primark, New Look, Topshop, Topman, Clarks, Waterstones and River Island. Multiples therefore account for 67.1% of the total units, with independent retail representing the remaining 32.9% of the total units. The larger proportion of multiple outlets is reflective of a purpose built managed shopping centre. The multiple retail offer is therefore considered to be strong and a key attractor. The table below illustrates the provision of multiple retail and service outlets and as expected shows above average representation of multiples especially in the comparison goods category.

Table 5: Category Composition

Category	No. of Outlets	% of Total Outlets	UK Average 2019 (%)
Comparison	132	66.0	42.6
Convenience	8	4.0	11.4
Retail Service	17	8.5	9.4
Leisure Service	32	16.0	22.2
Financial & Business Service	11	5.5	14.4
Total	**200**	**100**	**100.0**

The continued attraction and regional dominance of the centre is predicated on the strength of the various multiple brands on offer at the shopping centre. However as with all forms of retailing it is under increasing competition from online retailing. In this way the centre will have to continually reposition its offer to continue to maintain its sub regional dominance.

We have identified two operators seeking representation with a total requirement of between 19 sq m (200 sq ft) and 139 sq m (1,500 sq ft). These are:

- The Fragrance Shop (Use Class A1) – requirement of between 19 sq m (200 sq ft) and 139 sq m (1,500 sq ft)
- House (Use Class A1) - a requirement of 139 sqm (1,500 sq ft).

Pedestrian Footfall

On our site we observed strong pedestrian flows within the centre. Of particular note was around the food court area and Primark.

The Centre's website reports that the centre "welcomes 22 million visitors". This underpins the scale of attraction to the centre.

Accessibility

Road Access:
The centre is highly accessible by road and the centre is located along the main A4036 Pedmore Road. The centre is 0.71 km (0.4 miles) to Brierley Hill, providing connections to Stourbridge 3.64km (2.3 miles), Dudley 3.74 km (2.3miles) and Birmingham 19.1km (12 miles).

Car Parking:
Intu Merry Hill has 7 car parks and 9,209 free parking spaces as follows:

- Orange Car Park (844 spaces, 91 disabled spaces), Charges – Free Any Time
- Green Car Park (1,254 spaces, 92 disabled spaces), Charges – Free Any Time
- Purple Car Park (2,925 spaces, 92 disabled spaces), Charges – Free Any Time
- Red Car Park (842 spaces, 30 disabled spaces), Charges – Free but Maximum Stay 4 hours
- Blue Car Park (868 spaces, 33 disabled spaces), Charges – Free but Maximum Stay 4 hours
- Yellow Car Park (476 spaces, 48 disabled spaces), Charges – Free
- Grey Car Park (476 spaces, 48 disabled spaces), Charges – Free

The ‘red’ and ‘blue’ car parks serve the upper and lower retail parks. The others serve M&S, Argos, Debenhams and the Odeon Cinema.

There is very good provision of car parking in terms of quantity and type across the centre. This is substantially aided by the free parking at the centre.

Public Transport:
The centre is well connected particularly with bus stops and along bus routes via Brierley Hill to Dudley, Wolverhampton.

Table 6: Bus Stops and Services at Merry Hill

Bus Service Routes
2 - Weoley Castle - Merry Hill via Halesowen (Diamond Bus)
2 - Dudley - Merry Hill via Russells Hall Hospital (National Express West Midlands)
2A - Dudley - Merry Hill via Russells Hall Hospital (National Express West Midlands)
3 - West Bromwich - Merry Hill via Blackheath (National Express West Midlands)
4M - Walsall - Merry Hill via West Bromwich (National Express West Midlands)
7 - Dudley - Wollaston via Merry Hill, Stourbridge (National Express West Midlands)
8 - Wrens Nest - Wollaston Farm via Dudley (National Express West Midlands)
13 - Merry Hill - Halesowen via Fatherless Barn (Diamond Bus)
14A - Dudley - Merry Hill via Blackheath (National Express West Midlands)
15 - Wolverhampton - Merry Hill via Wombourne (National Express West Midlands)
15A - Wolverhampton - Merry Hill via Kingswinford (National Express West Midlands)
17 - Merry Hill - Halesowen via Cradley Heath (Diamond Bus)
18 - Dudley - Merry Hill via Cradley Heath (Diamond Bus)
18 - Dudley - Merry Hill via Cradley Heath (National Express West Midlands)
24 - Foxyards Estate - Merry Hill via Dudley (National Express West Midlands)
28 - Halesowen - Stourbridge via Merry Hill (National Express West Midlands)
81 - Wolverhampton - Merry Hill via Dudley (National Express West Midlands)
226 - Merry Hill - Dudley via Kingswinford (Diamond Bus)
228 - Russell's Hall Hospital - Kinver via Merry Hill (Diamond Bus)
250 - Stourbridge - Brockmoor via Merry Hill Circular (Diamond Bus)
251 - Stourbridge - Merry Hill via Brockmoor Circular (Diamond Bus)
X10 - Birmingham - Gornal Wood via Halesowen, Merry Hill (National Express West Midlands)

Lambert Smith Hampton

Bus Stops in Merry Hill	
Acres Rd (opp)	8, 228, 251
Acres Rd (adj)	8, 228, 250
Corbett Rd (opp)	8, 28, 228, 251
Corbett Rd (adj)	8, 28, 228, 250
Delph Rd (opp)	8, 28, 228, 250
Delph Rd (adj)	8, 28, 228, 251
Engine Lane (adj)	81
Engine Lane (opp)	81
Enterprise Trading Estate (opp)	81
Enterprise Trading Estate (adj)	81
Level St (after)	8
Level St (before)	8
Merry Hill Bus Station (Stand A)	8, 28, 228, 250
Merry Hill Bus Station (Stand B)	7, 228, 251, X10
Merry Hill Bus Station (Stand C)	226
Merry Hill Bus Station (Stand D)	3, 15, 15A
Merry Hill Bus Station (Stand E)	2, 2A, 7
Merry Hill Bus Station (Stand F)	8, 14A, 24, 28, 81
Merry Hill Bus Station (Stand G)	4M, 18, X10
Merry Hill Bus Station (Stand H)	002, 13, 17
Merry Hill Centre (adj)	881
Merry Hill Centre (opp)	881
Mill St (opp)	2, 2A, 8, 15, 15A, 28, 226, 228, 251, X10
Mill St (adj)	2, 2A, 8, 15, 15A, 28, 226, 228, 250, 251, X10
Mount Pleasant	13
Thorns Avenue (opp)	8, 228, 251
Thorns Avenue (adj)	8, 228, 250
Two Woods Lane (adj)	2, 3, 4M, 7, 13, 14A, 17, 18, 24, 28, X10
Two Woods Lane (opp)	2, 3, 4M, 7, 13, 14A, 17, 18, 24, 28, X10

As a regional shopping centre it is well connected by public bus provision. The centre is also connected to Birmingham, West Bromwich, Halesowen, Kingswinford and Wolverhampton. The centre also has its own bus station that is located near the Asda mall entrance.

Walking, Cycling and Disabled Access:
The centre is utilised by the resident community of nearby Brierley Hill and beyond via public transport provision. The centre also caters for cyclists with the provision of racks. The rack areas were are covered by CCTV and located outside:

- Green car park near Primark
- ODEON cinema
- Debenhams entrance
- JD Wetherspoon
- Matalan

Within the shopping centre Age UK Dudley operates the Shopmobility Service at Merry Hill Shopping Centre. Additionally, disabled parking is available across the centre's car parks. Pedestrian crossings have audible sensors for the disabled, elderly and visually impaired.

Perception of Safety and Occurrence of Crime

The centre is covered by CCTV cameras and staffed by security patrols. It is therefore a secure managed environment

There is no specific data on crime available for the shopping centre.

Commercial Rents

Agent sources estimate that Prime Zone A rents in Merry Hill Shopping Centre are in the range of £2,153/sq/m (£200/sq ft).

Environmental Quality

Being a managed centre, the environmental quality is of particular high quality. The centre has a contemporary architecture feel and is surrounded by landscaped green space. At the time of our site visit there was no sign of dereliction, litter or graffiti. The centre and surroundings are well maintained.

It is understood that the owners of the centre have a seven-year plan including a comprehensive refurbishment, covering the centre's entrances, malls, shop fronts and toilets. This will also include a 13,935 sqm (150,000 sq ft) leisure extension incorporating a restaurant quarter to complement the existing food offer in the centre. As at this stage the full scope of leisure offer is yet to be determined.

Evidence to Barriers to New Businesses and Existing Businesses Expanding

We are not aware of any immediate barriers to entry.

Extent of the Evening Economy

As a managed operation the Centre has defined opening and closing times as follows:

- Monday - 9am - 9pm
- Tuesday - 9am - 9pm
- Wednesday - 9am - 9pm
- Thursday - 9am - 9pm
- Friday - 9am - 9pm
- Saturday - 9am - 7pm
- Sunday - 11am - 5pm

In this way it can be seen that during weekdays there is late closure (albeit limited to a maximum of 9pm) that will satisfy a wide audience and especially families that seek to dine out or purchase a take away. Within the centre the leisure provision is dominated by 18 fast food and take away outlets, 16 cafes, and 10 restaurants. As stated previously, it is reported that Intu are planning further improvements to include a new cinema and an expanded leisure and dining area. The extent of provision shows a good representation from national chains (e.g. Burger King, KFC, McDonalds, Costa Coffee, Krispy Kreme Doughnuts, Chopstix, Greggs, Hey Potato, Starbucks, Subway, Wrapchic) and other casual dining chains (e.g. Five Guys, Nando's, Pizza Express, Pizza Hut). The siting of these in a covered weather proof location provides a space for social interaction, dining and entertainment.

Digital Facilities at Merry Hill

The centre offers free Wi-Fi to all shoppers visiting the centres. Additionally there are four free electric vehicle (EV) charging points that are available to use when the centre is open. EV charging points are found in the Debenhams car park and a further two located near the Argos.

Conclusions

Background to the Merry Hill health check appraisal
Merry Hill Shopping Centre is a regional shopping with a wide catchment area that encompasses the Black Country and beyond.

Sub-regional shopping hierarchy
The centre represents the single largest quantum of managed floorspace within the Black Country Area. Combined with the surrounding Brierley Hill High Street it collectively signifies a major quantum of floorspace that justifies its standing as a strategic centre within the Black Country.

Diversity of main town centre uses
As a regional shopping centre it is typified by the above average representation in comparison goods provision that is borne out in terms of the diversity of uses analysis. The centre also has good leisure provision in terms of national fast food and casual dining chains.

Retailer Representation
The shopping centre as would be expected is dominated by multiple retailers representing some 67% of units and 81% of the floorspace.

Proportion of vacant street level property
Both the Goad data and the Council's own monitoring data indicates a circa. +13% vacancy rate which is higher than the national average.

Customer's views and behaviour
The HTIS responses indicate a broad indication of satisfaction with the centre and with the key improvement cited as more / better food shops.

Pedestrian flows
Good pedestrian footfall was observed and the centre is reported to receive 22 million visitors underpinning the scale of attraction of the centre.

Accessibility
The centre is highly accessible both by road and public transport. The provision of ample free parking also benefits the centre.

Perception of safety and occurrence of crime
The centre is managed both in terms of manned security and CCTV provision making it a safe environment.

Commercial rents
Prime Zone A rents in Merry Hill Shopping Centre are estimated to be in the range of £2,153/sq/m (£200/sq ft).

State of the environmental quality
The centre has a high environmental quality and is well managed.

Digital facilities at Merry Hill
The centre offers free Wi-Fi to shoppers and there are four EV charging points.

Strengths of Merry Hill
- A shopping centre with a regional draw.
- High multiple retailer representation
- Good level of pedestrian footfall.
- Highly accessible by all modes of transport.
- Good diversity of uses especially comparison goods and commercial leisure provision.
- Ample car parking provision.
- Safe shopper environment.
- Provision of free Wi-Fi to shoppers.

Weaknesses of Merry Hill
- Higher than average vacancy rate.
- Only four EV charging points considering the quantum of car parking provision.

Opportunities within Merry Hill
- Additional leisure extension (scope of which at this stage remains yet to be determined).

- Potential to increase EV charging points.

Threats to Merry Hill

- The state of the retail economy
- Rising vacancy rate not being addressed.

Appendix 4: West Bromwich

West Bromwich Town Centre Health Check Appraisal

Context

West Bromwich Town Centre is a large retail centre and is ranked third highest in the Black Country. Defined by the local authority as a Strategic Centre in the Core Strategy, its role is somewhat now diminished in recent years (it is defined as a 'Sub-regional Centre' by Venuescore). The centre is large and varied, encompassing both successful and declining areas of retail and different sub areas with different functions. The centre today displays visual evidence of experiencing the highs and lows of previous waves of regeneration and wider downwards trends in the retail market. This has left the town with a centre that appears not to have the activity required to animate its full extent.

The centre is organised around a strong linear high street form: High Street extends from north-west to south-east with a focus of high street retail activity on the pedestrianised Princess Parade/Duchess Parade section, which is enclosed by the West Bromwich Ringway. This corresponds with the current Primary Shopping Area planning policy designation.

The most successful part of the centre lies to the north of this, and is the result of a high profile regeneration scheme focused around New Square. This is anchored by a Tesco Extra (the largest in Europe when it was built), which opened in 2013. Despite the extent of its offering this has also managed to animate an adjacent covered street (now named as New Square) which provides high-specification modern accommodation for the likes of Topshop, Next, H&M, River Island, Primark and other national operators. The Public, an iconic building of architectural merit, designed by Will Allsop, sits in the centre of New Square. The Square benefits from the recent arrival of a six screen Odeon cinema. This has supported several new family restaurant uses on the square, although other similar units that front onto the Square have remained vacant.

The new retail units next to Tesco have been a major boost to the centre. It has however, moved the centre of gravity away from the High Street and probably led to vacancies elsewhere. This can be seen at the adjacent Queens Square shopping precinct, and the eastern part of Princess Parade. Previously being of rather dated appearance the Queens Square Shopping Centre underwent a major two-phase refurbishment programme following the arrival of Tesco. Despite Poundland having recently relocated here from High Street the majority of units within the centre (52% of units at time of survey) are now vacant.

This problem can also be seen on High Street (Duchess Parade/Princess Parade), where although a high quality public realm extends throughout its length within the Primary Shopping Area (a positive legacy of the New Square regeneration initiative). There is no longer sufficient retail activity to animate the full length of this long high street (approx. 600m). This is most evident at the south-eastern end of Princess Parade. Beyond the entrances to the two shopping centres it is clear that vacancies become particularly prevalent. The retail uses that do remain are typically more secondary in nature, comprising discount retailers, independents and shops serving the diverse ethnic community.

The remainder of the pedestrianised High Street performs better, providing a mix of independents and national retailers. There is a high level of activity on the street, supported by a busy street market that extends the whole length of Duchess Parade/Princess Parade. Kings Square was not as dated as Queen Square and so did not undergo the refurbishment and associated disruption that affected Queens Square. It is currently functioning much more successfully, with only a few vacancies. This centre is anchored by an indoor market, which is in decline, of dated appearance and proposed for redevelopment.

Outside of the Primary Shopping Area there are several distinct areas, each with a different character. The continuation of High Street south-east of Bull Street provides a different and distinct retail offer. This has the feel of a separate local centre, rather than being part of the town centre, with a focus on providing retail, community and evening leisure uses for communities of South Asian origin. Uses here include a Sikh Temple, an Asian foodstore and other specialist shops (e.g. clothing stores, travel agencies and jewellers). There are also other uses. The recently developed mixed-use block on the corner of High Street and Bull Street provides affordable housing apartments above ground floor retail in a high quality contemporary development. This lies close to a dated office block (in a landmark tower block) and a Premier Inn. The West Bromwich Area Action Plan (adopted 2012) identified several opportunities for significant redevelopment here. At present though the area appears to function well in its current role, largely serving a South Asian ethnic market. Indeed, this role appears to be successful enough to extend across Bull Street with similar shops opening in the near most units here in recent years.

There is a small grouping of shops on Bull Street that have specialist retail or community uses, with a high number of vacancies. The heavily trafficked nature of the Ringway, and its position opposite a multi-storey car park makes this area unsuitable for other uses such as residential, although the car park is scheduled for demolition, which will change the character of this area

At the opposite end of the centre, where High Street continues beyond the Ringway (St Michael’s Street), is the most attractive part of the centre. Also the focus of a conservation area, this area contains several listed buildings: St Michael’s Church, the Town Hall, Library and Astle House (which is currently vacant). This area is outside of the Primary Shopping Area and principally provides civic and community uses (Council offices, the Library, St Michael’s Church). It also includes several banks (Lloyds and Barclays). Alongside these are cafes, public houses and specialist retail. The area also includes the Astle Retail Park, which consists of outlet stores and discounters (including Marks & Spencer’s Outlet and B&M Bargains) with generous surface level car parking, and would appear to operate quite independently to its surroundings.

Lambert Smith Hampton

Sub-Regional Shopping Hierarchy

The most recent (2016-17) Venuescore rank shows the centre is currently ranked at 186 and classed as a 'Sub-Regional Centre'. Historic rankings reflect its recent history. In 2010 it was ranked significantly lower at 238, rising to 161 in 2014, no doubt as a result of the regeneration initiative that brought Tesco Extra and the accompanying national retailers to the town. In more recent years it has declined (24 places from 2014-16). It may well have declined further since 2016.

Table 1: Sub-Regional Shopping Hierarchy

VENUE	SCORE (2016/17)	Local Authority	Location Grade (2016/17)	2016 Rank	2014 Rank	2010 Rank	Change 2010 –2016
Wolverhampton	189	Wolverhampton	Regional	92	68	49	-43
Walsall	172	Walsall	Regional	115	116	143	+28
West Bromwich	**129**	**Sandwell**	**Sub-Regional**	**186**	**161**	**238**	**+52**
Brierley Hill	62	Dudley	District	1074	989	794	-280
Stourbridge	72	Dudley	Major District	390	468	498	+108
Dudley	60	Dudley	Major District	492	414	345	-147
Halesowen	57	Dudley	Major District	520	456	373	-147
Bilston	41	Wolverhampton	District	754	674	628	-126
Oldbury	37	Sandwell	District	847	966	976	129
Smethwick [Bearwood Rd]	37	Sandwell	District	847	768	799	-48
Rowley Regis, Blackheath	34	Sandwell	District	937	989	1050	+113
Bloxwich	32	Walsall	District	1008	935	902	-106
Tipton, Great Bridge	28	Sandwell	Minor District	1140	1792	*	N/A
Wednesbury	27	Sandwell	Minor District	1187	1061	976	-211
Aldridge	26	Walsall	Minor District	1233	1167	1139	-94
Brownhills	26	Walsall	Minor District	1233	1257	1096	-137
Smethwick, Windmill SP [Cape Hill]	23	Sandwell	Minor District	1368	1257	458	N/A
Willenhall	26	Walsall	Minor District	1233	1021	1377	+144
Wednesfield	21	Wolverhampton	Minor District	1481	1257	936	-545
Cradley Heath	21	Sandwell	Minor District	1481	1406	*	N/A
Darlaston	15	Walsall	Local	2021	1895	628	-1393

Source: Venuescore 2016-17, 2014-15 and 2010-11 UK Shopping Venue Rankings (Javelin Group); * = comparable data not available

Photographs of West Bromwich Town Centre

New Street, the covered street by Tesco Extra


High Street, with outdoor market

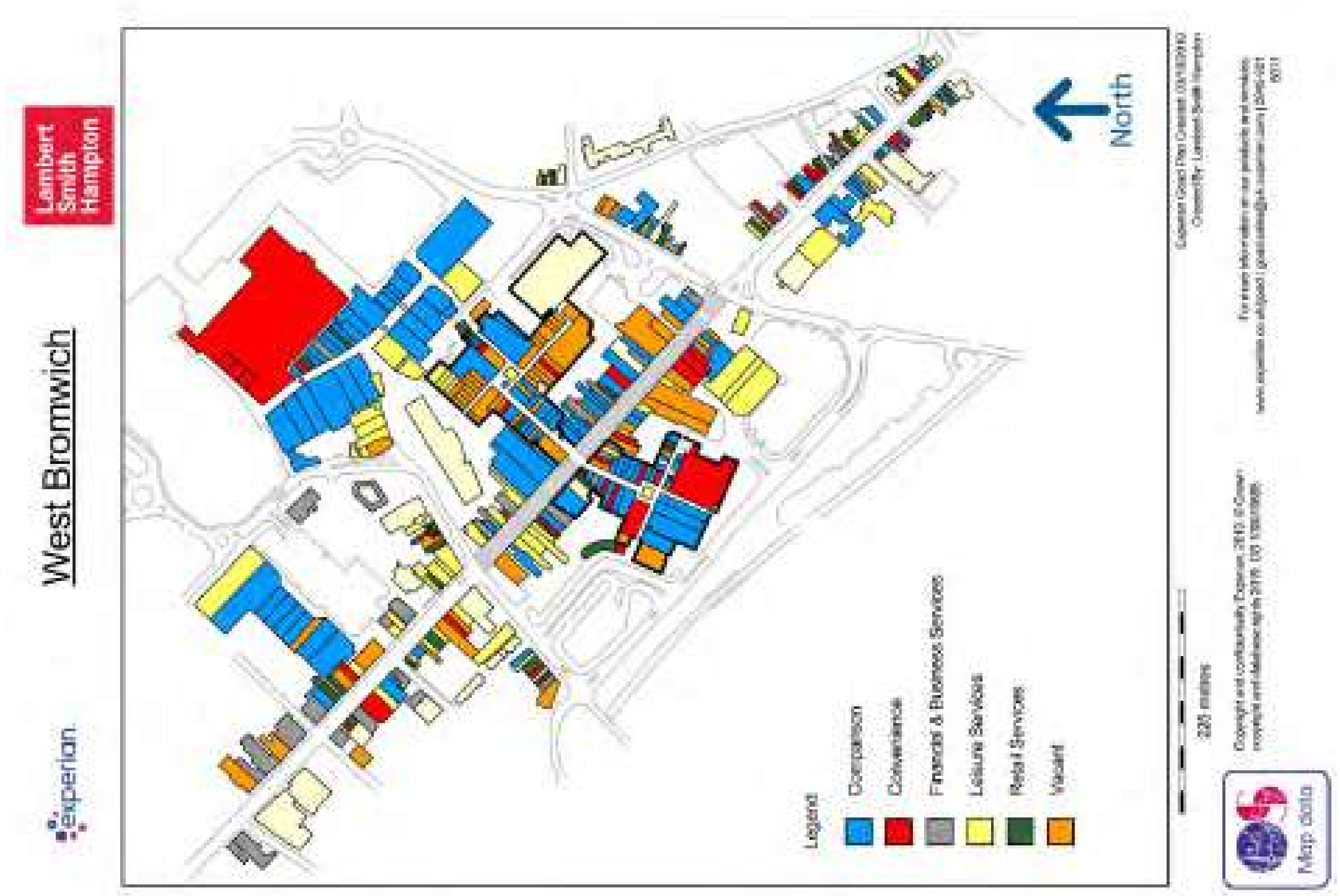

New Square


New housing on corner of High Street/Bull Street

High Street, east of Bull Street


The King’s Centre

Diversity of Main Town Centre Uses – July 2019



Lambert Smith Hampton

Diversity of Main Town Centre Uses – August 2019

Table 2: Number of Units in West Bromwich Town Centre (July 2019)

Category	No.	%	UK %*
Convenience	38	10.2	15
Comparison	122	32.7	36
Retail Service	44	11.8	7
Leisure Service	60	16.1	25
Financial and Business Service	38	10.2	8
Vacant	71	19.0	9
Total	**373**	**100**	**100**

Source: Goad survey 2018, updated by LSH site visit 2019
*UK average from the Experian Goad Category Report, June 2018

Table 3: Floorspace in West Bromwich Town Centre (July 2019)

Category	Sq.m	%	UK %*
Convenience	21,730	19.5	9
Comparison	40,880	36.6	32
Retail Service	4,360	3.9	14
Leisure Service	16,230	14.5	24
Financial and Business Service	8,300	7.5	11
Vacant	20,120	18.0	11
Total	**111,650**	**100**	**100**

Source: Goad survey 2018, updated by LSH site visit 2019
*UK average from Experian Goad Category Report, June 2018

Table 4: Number of Units in West Bromwich Town Centre (2015)

Category	No.	%	Sq.m	%
Convenience	32	8.8	21,277	19.4
Comparison	112	30.7	41,170	37.6
Retail Service	36	9.9	6,400	5.8
Leisure Service	55	15.1	12,707	11.6
Financial and Business Service	37	10.1	8,447	7.7
Vacant	93	25.5	19,520	17.8
Total	**365**	**100**	**109,521**	**100**

Source: West Bromwich Town Centre Health Check (WYG, 2015)

Goad analysis has been obtained for the centre and collaborated with a site visit in 2019. This allows useful comparisons to be made with both the previous healthcheck data (in 2015) and with the national average. In total West Bromwich has 373 units, 19% of which are vacant. Whilst this vacancy rate is very high, being 10% worse than the national average, it does represent an improvement since 2015, when 1 in 4 shops were vacant. The centre has also grown slightly, rising from 365 units in 2015, with just over 2,000 sq.m floorspace added. This growth is a positive sign but the high number of vacancies does suggest that the centre may be unsustainably large and requires consolidation.

Convenience Good Units
The centre is anchored by a large Tesco Extra and this is reflected in the floorspace figures, with the proportion of convenience retail being 10% higher than the national average. When this superstore is excluded though, the situation is very different, with the overall number of units (38) being 5% less than the national average by proportion. The other main convenience units are the indoor market, Iceland and Farmfoods. Tesco has no real competition. There has been a slight growth in this sector locally since 2015 (six additional units and a small increase of around 500 sq.m).

Comparison Good Units
The centre has a relatively healthy amount of comparison units (122), falling only around 3% behind the national average, both in terms of number of units and floorspace. There has been a slight increase since 2015 (10 additional units and around 200 sq.m). This positive position is likely to be in large part supported by the new retail units alongside Tesco Extra. These was built in 2013 and mostly fully let in 2015, with the exception of 5 units which are now all let. It is likely that this largely explains the growth of the comparison goods sector. Comparison goods units are very clearly concentrated in a central band comprising New Street, parts of the Queen's Centre, in the central portion of High Street and in the King's Centre. This is effectively anchored by the Tesco Extra and Indoor market at either end. Outside of this there is generally only a few specialist retail units. Astle Outlet Park provides comparison goods retail of a different type and this remains well-let. This is a similar situation to 2015, although there were more comparison units outside the central band.

Retail Services
The retail service offer has grown slightly in West Bromwich since 2015, at a slightly greater rate than the sector has grown nationally. There are 8 additional retail service units (an increase of around 2%, to 12% of the units). This represents a very small amount of floorspace: only 4%, in comparison to a national average of 14%, despite having 5% more units. This suggest that these uses are being delivered in small units, which is indeed the case in the centre, with retail services occupying small units dispersed throughout.

Leisure Services
The leisure sector has also increased slightly (by 5 units) since 2015 and has maintained a proportion of around 15% - which is significantly below the national average, on both proportion of units and floorspace (which is both around 25%). The centre does lack a significant evening economy. Units facing the public space that one would expect to accommodate food and drink uses remain partially vacant. The increase in the sector corresponds with five additional units becoming let here since 2015, although a few units appear to have become vacant since 2018 (e.g. Prezzo and units on the Queens Square frontage). Some of the let units are national chains (Burger King and Nando's) but others are independent cafes or take-aways. The success of food and drink uses in the units around the public space has no doubt been affected by the closure of The Public (which originally included a theatre and was included in the original Regenco masterplan as an anchor use here). This iconic building has since been successfully converted into 'Central Sixth' further education college, adding significant footfall and activity to the area. The situation has improved with opening of the Odeon cinema in 2013 and several more of these units have been let since 2015. Outside of this location, the leisure sector is fairly dispersed but there is a small concentration on High Street either side of St Michael Street, though this mostly comprises take-aways. The leisure sector is set to increase when the JD Gym opens [NB. update: this is now open] at the Farley Centre, off Princess Parade. This is currently undergoing refurbishment

from vacant retail units.

Financial and Business Services
There has been little change in the number of units sector since 2015 (although the West Bromwich Building Society HQ has moved outside of the centre to nearby Providence Place). but it remains strong, being slight above the national average in terms of proportion of units (10% compared to 8%) but below it in terms of floorspace (7.5% compared to 11%). The centre retains branches of all the large national six banks.

Proportion of Vacant Street Level Property

The centre currently has 71 vacant units, representing 19% of the total, far above the 9% national average. This represents 18% of the total floorspace. Although high, this is an improvement on the 25.5% vacancy rate in 2015. 32 of these vacancies are within the Queen's Square Centre. If these were removed from the total, the vacancy rate would be just 10% so this is clearly the main contributor to the centres vacancy levels. The situation has improved from a very low base: there were 45 vacancies in the Queens Square Centre in 2015.

There is also a cluster of vacancies at the eastern end of Princess Parade, where 13 units are vacant, including some large units. The vacancies here include the Farley Centre (three units with a total of 2,880 sq.m) which is currently undergoing refurbishment, comprising all three units, to open as a JD Gym. This would reduce the total vacant floorspace by 3%. However, not included in the totals here are the block at 167-177 (two units, one of which is large), which has recently been demolished, with no planning application yet submitted for a new use.

Outside of these clusters the vacancies are distributed throughout the centre, although it should be noted that there was only one vacant unit on the stretch of High Street east of Bull Street.

Lambert Smith Hampton

Customers' Views and Behaviour

NEMS have undertaken a telephone customer survey in support of this study. We have extrapolated from this zones 16 and 17 as representing the main users of West Bromwich Town Centre (for these zones more than 25% identify Walsall as their location for comparison goods (fashion) shopping [Q22] and/or for other town centre uses [Q4] or when combining food shopping with other activities [Q6]). This then reveals the following (using weighted percentages):

- Most people visit foodstores at West Bromwich town centre by car (54 and 55 % for each zone respectively as either driver of passenger); although many also walk (23%, 9%) or travel by bus (8%, 20%).
- Most people do not combine visits to the foodstore with other activities in the town centre (70% for both areas).
- Of those that do combine with other activities the most popular are other food shopping (11%,12%), non-food shopping (10%, 9%). No other activity polled on average above 5%.
- Most visit the town centre once a week or 2-3 times a week (35%, 49%).
- Most respondents use the town centre for most of their shopping and town centre uses (69%, 77%).
- Things people liked most about the centre were that it was close to home (47%, 39%); had good facilities in general (14%, 11%), affordable shops (13%, 8%), good range of non-food shops (12%, 10%). 24% and 27% liked nothing about the centre.
- When asked what could be improved most said cleaner streets (12%, 14%); more national multiples (
- Those that do not visit the centre for most of their shopping identified the following reasons why not: poor range of foodstores (5%, 19%); poor range of non-food shops (10%, 9%); poor range of independent shops (10%, 8%); feeling unsafe (16% both).
- Popular leisure attractions include: restaurants/cafes (58, 56%); cinema (49%, 46%); pubs/bars/clubs (43%, 37%); and theatre/music venues (19-40%).
- Of those visiting the cinema the clear majority (69%, 61%) visited the Odeon in West Bromwich town centre.
- West Bromwich town centre was the most popular choice for pubs/bars/clubs (51%, 56%), with Birmingham city centre coming second (15%, 16%).
- West Bromwich was the most popular choice for restaurants (36%, 49%) but with strong competition from Birmingham (28%, 10%).
- When asked to suggest improvements to the leisure offer there was a wide variation of responses with clearest majority for 'nothing' (30%, 50%,) though other relatively popular choices were a swimming pool (7% both), cheaper prices (9%, 10%), improved security/CCTC (9%, 15%) and more for children (9%, 4%) and more quality restaurants (5%, 7%).

Retailer Representation and Intentions to Change Representation

In 2015 the centre had 12 of the 26 major comparison retailers. Today it has 15 so represents a notable improvement to the retail offer. The additions are a result of additional new units within New Street being let (it should be noted that Dorothy Perkins and Topshop both share the same unit. The town centre lacks any of the major department stores. Although there is a Marks & Spencer's store it is an M&S Outlet store within Astle Retails Park.

For a centre of this size, one may expect there to be a greater proportion of the major comparison retailers present.

Table 5: Experian Goad list of Major Comparison Retailers

Retailer	April 2015	July 2019
Argos	Yes	Yes
Boots the Chemist	Yes	Yes
Burton	No	No
Carphone Warehouse	Yes	Yes
Clarks	No	Yes
Clintons	No	No
Debenhams	No	No
Dorothy Perkins	No	Yes
H&M	Yes	Yes
HMV	No	No
House of Fraser	No	No
John Lewis	No	No
Marks & Spencer	Yes	Yes*
New Look	Yes	Yes
Next	Yes	Yes
O2	Yes	Yes
Primark	Yes	Yes
River Island	Yes	Yes
Superdrug	Yes	Yes
TK Maxx	No	No
Topman	No	No
Topshop	No	Yes
Vodafone	Yes	Yes
Waterstones	No	No
WHSmith	No	No
Wilkinsons	No	No

Source: Goad plan from 2018 and WYG survey in July 2019; WYG Healthcheck 2015
*M&S Outlet at Astle Retail Park

Pedestrian Flows

Pedestrian flows were high on the day of the visit (a weekday morning during the summer school holidays). This was particularly true of Princess Parade/Duchess Parade and New Street. The street market runs six days a week and was open at the time. King’s Square was also busy. Queen’s Square, although mostly vacant, did have people moving through it. Footfall drops-off dramatically on the eastern part of Princess Parade. High Street (east of Bull Street) and High Street (west of St Michael’s Street) were as busy as would be expected for edge of centre areas.

Accessibility

Road Access:
The centre is easily accessible by road. It is directly accessible from the M5 at junction 1 and Birmingham Road, and from the A41, which passes to the north of the centre and provides direct to the Tesco Extra car park and to Astle Retail Park, and from further east via High Street. There are also multiple roads accessing the centre from the west, south and east. The Ringway serves to allow the core of the centre to be kept as a pedestrianized area, which has helped to deliver a high quality public realm and active street market.

Car Parking:
The town centre has a plentiful supply of public and private car parking, moderately priced and well located. This includes:

- [Queens Square: 80p for 2 hours, 750 spaces - *since closed to the public*]
- New Square: £1.60 for 2 hours, 1061 spaces
- Tesco Extra: £1.60 for 2 hours, 850 spaces
- Thomas Street: 80p for 2 hours, 26 spaces
- Edward Street: 40p for 2 hours, 158 spaces
- Astle Retail Park: £1.60 for 2 hours, c.300 spaces

A Council survey undertaken in 2015 confirmed that the car parks were operating well below capacity.

Public Transport:
The Sandwell & Dudley and Hawthorns rail stations offer relatively easy connections (12 minutes by a bus every 6 minutes from Sandwell& Dudley or a similar bus journey but with a 15 minute walk added from the Hawthorns). West Bromwich does not have a mainline rail station, it does however benefit from the Metro tram system running along the route of the former rail line through West Bromwich. The Metro tram system passes close to the town centre with the West Bromwich Central Station being located adjacent to King's Square Shopping Centre. In addition to providing good access this helps to anchor the centre and increases footfalls with desire lines running through the centre. The bus station is also located close to King' Square, on its western side, adjacent to St Michael's Street where it also provides direct access into the heart of the centre. Good connections to Birmingham are both an asset for West Bromwich, and its opportunity for investment, but also represent a risk in allowing residents to visit Birmingham in place of West Bromwich town centre. In summary though, the centre is easily accessible by public transport for its users.

Walking, Cycling and Disabled Access:
The centre is generally level, the core areas benefit from pedestrianisation and a well-considered public realm design. Consequently it is easy to navigate on foot and for those groups who are less mobile, although the market stalls and associated street clutter makes this a little more difficult to navigate. Where buses penetrate the core this is well considered in the design and preserves a feeling of pedestrian priority. St Michael's Street's footways have been widened for pedestrians, parking lay-bys are well integrated and pedestrians are well served with pedestrian crossings, with tactile paving. Bull Street has not been improved in a similar manner and remains a highways-dominated space. Pedestrian railings provide protection but create more indirect routes for pedestrians and makes pedestrian movement appear less inviting and secondary to motorists. Similar safety measures can be achieved in less hostile ways (e.g. through use of low bollards).. High Street east of Bull Street is similar in form. High Street to the west of St Michael's Street benefits from pavement widening in places and a generous cycleway. Bus movement is well provided for and on-street parking is well integrated into the street. Outside of this there is little dedicated cycle infrastructure.

Lambert Smith Hampton

Perception of Safety and Occurrence of Crime

When surveyed, there were no obvious points of risk to safety, however fear of crime is highlighted as a significant concern (for example in recent petitions submitted to the Council) detracting visits to the town centre.

In parts of the town centre that benefit from new public realm works there is an outward feeling of safety, also promoted by the level of activity and natural surveillance increases here. This level of activity persists even in areas where there are many vacancies. Many people still move through Queen's Square for example, and Princess Parade and New Square are wide spaces that benefit from overlooking and activity. There are few areas that lack surveillance or felt uninviting during our survey. However, the centre was visited during the daytime and not at night, when the fear of crime is probably greatest. Crime statistics do not record particularly high levels of crime. In August 2018-July 2019 for the B70 8 postcode district (which extends significantly beyond the centre) there were 175 violent crimes, 55 vehicle crimes, 87 thefts and 68 incidents of anti-social behaviour. For an area with a daytime population of 5,000 people this is a comparatively low rate of crime, although the residents' fear of crime is a genuine issue if it is detracting from visits.

Source: *UK Crime Stats*

Commercial Rents on Non-Domestic Property

The Promis report (June 2019) summarises that prime town centre rents at the end of 2018 for Zone A were £35/sq.ft. This is a weak position compared to the Promis 2009 Centres average of £106. It also represents a 12.5% decrease since the end of 2017 (compared to just a 3.5% decrease for the Promis average). The town centre is performing poorly and getting worse in terms of rents, which is a concerning signal. In terms of yields though the centre was achieving 7.85% at the end of 2018, which is above the Promis average of 6.85%. However, as we have seen across the UK, the correction in Zone A rents may be allowing space to be more affordable to tenants which is a key contributor to the recorded reductions in vacancies.

Environmental Quality

As described elsewhere in this report, the Primary Shopping Area, in its entirety, benefits from an excellent public realm, following recent regeneration and investment. Physically the large New Square development is a positive feature, although the experience of the large public space that it adjoins is detracted from by a number of vacant units (especially those on the Queen's Square frontage which one would otherwise expect to be occupied by food & drink uses that could help to animate the space). The Public, designed as a centrepiece for the square, remains as an iconic building designed by a signature architect, although it is now used by Sandwell College rather than being in its original and intended use. On High Street the public realm is somewhat compromised by the street market – with stalls that are of a mostly functional appearance, and lack space for storage, resulting in an untidy appearance. The built form in the centre generally lacks any local distinctiveness and includes a considerable number of dated and unattractive 1960s/70s frontages.

The most attractive part of the centre in on High Street west of St Michael's Street, which is within a Conservation Area. This area benefits from considerably more distinctive and historic buildings linked to the Black Country's industrial heritage. This includes listed buildings such as the Town Hall and Library but also distinctive non-listed buildings such as that now occupied by Lloyds bank, and the Sandwell public house. The public realm here been improved but the street does still have to accommodate significant traffic and bus movements. This is the only part of the centre that has the potential to offer a distinctive placemaking experience, and so offers good opportunity. St Michael's Church is visible throughout much of the centre and provides an attractive landmark and helps promote a positive, distinctive identity.

The eastern end of Princess Parade, Bull Street and the part of High Street east of this suffers from a dated and less attractive public realm, highway dominated infrastructure (including pedestrian railings) and more unattractive buildings, such as the prominent eyesore of the West Plaza office building (partially occupied by Premier Inn).

Lambert Smith Hampton

Digital Facilities in West Bromwich Town Centre

The town centre benefits from ample coverage of free Wi-Fi hotspots. There are several websites of varying quality:

- Queen's Square has a good quality website with links to individual retailers websites;
- King's Square has a more basic website with a list of retailers; and
- New Square has a good website with a cohesive brand and special offer promotions, but with no links to individual websites.

The town centre benefits from a comprehensive website, operated by the BID team, which provides an index of retailers and promotes events. It also has linked Twitter, Instagram and Facebook accounts. Queen's Square also hosts Amazon lockers.

In general, the positive measures are welcomed but a more co-ordinated approach is required, with greater linkage between the online and physical experience in the town centre.

Conclusions

In summary, West Bromwich is a relatively large and successful centre, accommodating many national retailers and comparison units. It benefits from an excellent public realm and provides a major Tesco Extra store which is well integrated into the centre and supports an example of new modern retail development, which is fully let to a good range of top national retailers. However, the centre as a whole does not perform as well in all places, and there are high concentration of vacancies and other negative indicators (such as rental values).

When examining the diversity of uses, the centre appears to be relatively healthy in comparison with national averages and historic trends. However, it should be noted that the previous 2015 survey was undertaken at a record low period, when 25% of units were vacant. The Venuescore rankings reveal that the centre has fallen in ranking in the period 2014-16. The vacancy rate has gone down since 2015, despite the addition of 8 more units, which is positive, but this should not mask the fact that the current 19% vacancy rate is well above the national average (9%) and is a major concern, especially with this including many long-term vacancies, with many of the same vacant units being identified on the 2015 Goad plan (particularly within the Queen's Centre). The Queen's Centre is a particular problem for the town centre, as are, to a lesser extent, the difficulties experienced in establishing an evening leisure economy at New Square.

There are numerous positives: there is an excellent supply of parking (with a surplus of spaces) – although this is a little concentrated toward the New Square area and business at King's Square have raised this as an issue. The centre is easily accessible by car and there are excellent public transport connections (despite the lack of a mainline rail station).The centre appears safe in the daytime, but residents have raised concerns of a fear of crime which is detracting people from visiting the centre. There are positives in the digital infrastructure, but there is still room for improvement. High Street east of Bull Street is functioning well with a distinct role serving a specific community. High Street east of St Michael's Street is also successfully providing a distinct function: that of a civic and community role. Its heritage environment offers the potential for the growth of a food and beverage and leisure role here and the focus on a placemaking agenda.

However, the number of vacancies and recent developments in the high street national retail market represents a major threat to the centre, which could be in quite a vulnerable position given the length of the High Street and its reliance on comparison goods retailing.

Recommendations

Many lessons, positive and negative, can be drawn from West Bromwich Town Centre and its recent history. On the one hand, the regeneration initiative that secured Tesco Extra, the adjacent modern retail units, the Odeon and a high quality public realm throughout the retail core, can be considered a major successful intervention resulting in a major rise in the retail rankings. One detrimental effect is the impact on other parts of the centre that may have inadvertently resulted from moving 'centre of gravity' (i.e. its peak point of activity), and in providing additional retail space at a time when the national retail market has declined considerably in the interim. We can also see the failures of the design-led approach of The Public and in refurbishing The Queen's Shopping Centre at a critical time. West Bromwich is now at a point where it is again in need of significant restructuring, largely as a result of the recent rapid deterioration of the high street retail nationally, which has exacerbated the aforementioned issues at West Bromwich.

In our view, the town centre is in need of a masterplanning exercise and it is vital that this considers all parts of the town centre and is realistic and pragmatic about the future of the retail market. The most recent similar exercise is the West Bromwich Area Action Plan (AAP), which was adopted in 2012. Several schemes within this have now been delivered, and the Council are promoting other initiatives (for example the West Bromwich East mixed use proposals for the town centre area east of Ringway). The town centre, as a retail destination, is likely to need further consolidation from that envisaged here. It is also vital that any area where contraction from retail is identified has a clear new non-commercial role. This will need to be the subject of further analysis and a detailed masterplanning exercise, but based on our this healthcheck analysis our initial recommendations are that:

- The Primary Shopping Area is contracted back on Princess Parade such that its eastern limit is the entrance to the King's Square and Queen's Square shopping centres. East of this, the area will remain a part of the Town Centre designation, but a more flexible approach should be taken to accommodating a range of uses, including residential and non-retail town centre uses.
- High Street east of the Ringway (Bull Street) should be removed from the Town Centre altogether and instead reclassified as a separate Local Centre. This should continue in its current role, principally providing for local needs and serving South Asian communities. This will include local needs retail, specialist retail and community uses.

- On the opposite end of High Street, to the west of Ringway (St Michael's Street) by St Michael's Church, the area should continue to be designated as it is currently – within the town centre but outside the Primary Shopping Area. This should continue in its current role: as a focus for civic, community and evening leisure uses. This area should be increasingly promoted as a distinct quarter, with its own name and brand (St Michael's) and should be the focus of new high quality evening leisure (food and beverage) uses, capitalising on the high quality environment and its heritage assets. Finding a suitable new use for Astle House will be an important part of this. There is an opportunity to capture food and drink trade from visitors to the Astle Retail Park.
- Serious consideration must be given to the future of Queen's Square. This should include a market-led approach, considering a wide range of potential uses, including non-retail town centre uses. It is an important thoroughfare through the centre and should be maintained as a pedestrian route through in any redesign.
- With the closure of The Public there is a need for a more significant evening leisure use to anchor New Square (alongside the existing Odeon). The potential to provide this within Queen's Square – within the one large vacant unit, or in a series of vacant units within a co-ordinated environment, should be explored. This is likely to require further refurbishment and conversion. Providing such an anchor, to meet 21st century leisure needs, could also serve to anchor food and drink uses within Queen's Square and on the vacant units facing the square.
- Consideration also needs to be given to the outdoor market on High Street. Whilst the benefit that this has on providing vibrancy and footfall is welcomed, it does present an untidy appearance and jars with the high quality appearance of the public realm here. Re-organisation of the market should be considered, to retain the presence of the street market but by providing new stalls and an improved, more co-ordinated appearance. This needs to be properly funded to be of a sufficiently high quality.
- On the periphery of the town centre there is evidence of a number of well-designed residential development uses that have been developed with innovative design and public realm which contribute positively to the areas vibrancy and are well connected to the retail core.

Appendix 5: Walsall

Walsall Town Centre Health Check Appraisal

Context

Walsall is one of the largest town centres in the Black Country area and the largest centre within the Walsall Council area. The centre is focused around a northwest-southeast orientated, pedestrianised, linear high street: High Street/Park Street. This is crossed by Bradford Street/Darwall Street, which is also pedestrianised. A central focal point, and public square (The Bridge), is located at their intersection. Darwall Street gives access to the bus station, which is located very close to the high street. Walsall is a market town and a street market is held five days per week throughout this pedestrianised core, focusing on The Bridge.

The town centre is well anchored by Asda and Tesco superstores, located at either end of the high street. The centre also benefits from a third supermarket: Morrison's, lying to the north-east on the edge of the town centre. A number of retail streets lie between High Street and Morrison's. There are also a number of shopping precincts lying between the retail streets: the larger Old Square Shopping Centre situated to the north of High Street and the smaller Digbeth Arcade to the south; the Saddlers Centre is located off Park Street, as is Park Parade, which provides more secondary retailers. A large retail park (Crown Wharf) sits to the immediate north-west of the retail core, just within the designated town centre but very much operating as an edge-of-centre retail park and centred around a unique canal basin At the north side of the centre Bridge Street acts as a relief road, removing road traffic from the pedestrianised core, but bringing heavy traffic to peripheral streets. Moving away from the high street retail core the retail function becomes diluted: Lichfield Street (beyond the Bridge Street northern ring road) has a civic and arts focus, Stafford Street and Bradford Street accommodate secondary retail alongside other town centre uses.

Lambert Smith Hampton

Sub-Regional Shopping Hierarchy

The most recent (2016-17) Venuescore rank shows that Walsall is the 115th ranked centre and defined as a 'Regional' centre. It is the third largest retail centre in the Black Country area. It has held its own in recent years, being ranked similarly at 116 in 2014, and has actually improved since 2010, rising by 28 places. However, it should be noted that the most recent data is from 2016 and the centre is likely to have declined significantly since then.

Table 1: Sub-Regional Shopping Hierarchy

VENUE	SCORE (2016/17)	Local Authority	Location Grade (2016/17)	2016 Rank	2014 Rank	2010 Rank	Change 2010 –2016
Merry Hill Shopping Centre	219	Dudley	Regional	62	60	44	-18
Wolverhampton	189	Wolverhampton	Regional	92	68	49	-43
Walsall	**172**	**Walsall**	**Regional**	**115**	**116**	**143**	**+28**
West Bromwich	129	Sandwell	Sub-Regional	186	161	238	+52
Stourbridge	72	Dudley	Major District	390	468	498	+108
Brierley Hill	62	Dudley	District	1074	989	794	-280
Dudley	60	Dudley	Major District	492	414	345	-147
Halesowen	57	Dudley	Major District	520	456	373	-147
Bilston	41	Wolverhampton	District	754	674	628	-126
Oldbury	37	Sandwell	District	847	966	976	129
Smethwick [Bearwood Rd]	37	Sandwell	District	847	768	799	-48
Rowley Regis, Blackheath	34	Sandwell	District	937	989	1050	+113
Bloxwich	32	Walsall	District	1008	935	902	-106
Tipton, Great Bridge	28	Sandwell	Minor District	1140	1792	*	N/A
Wednesbury	27	Sandwell	Minor District	1187	1061	976	-211
Aldridge	26	Walsall	Minor District	1233	1167	1139	-94
Brownhills	26	Walsall	Minor District	1233	1257	1096	-137
Smethwick, Windmill SP [Cape Hill]	23	Sandwell	Minor District	1368	1257	458	N/A
Willenhall	26	Walsall	Minor District	1233	1021	1377	+144
Wednesfield	21	Wolverhampton	Minor District	1481	1257	936	-545
Cradley Heath	21	Sandwell	Minor District	1481	1406	*	N/A
Darlaston	15	Walsall	Local	2021	1895	628	-1393

Source: Venuescore 2016-17, 2014-15 and 2010-11 UK Shopping Venue Rankings (Javelin Group); * = comparable data not available

Photographs of Walsall City Centre


Lichfield Street


St Paul's Street

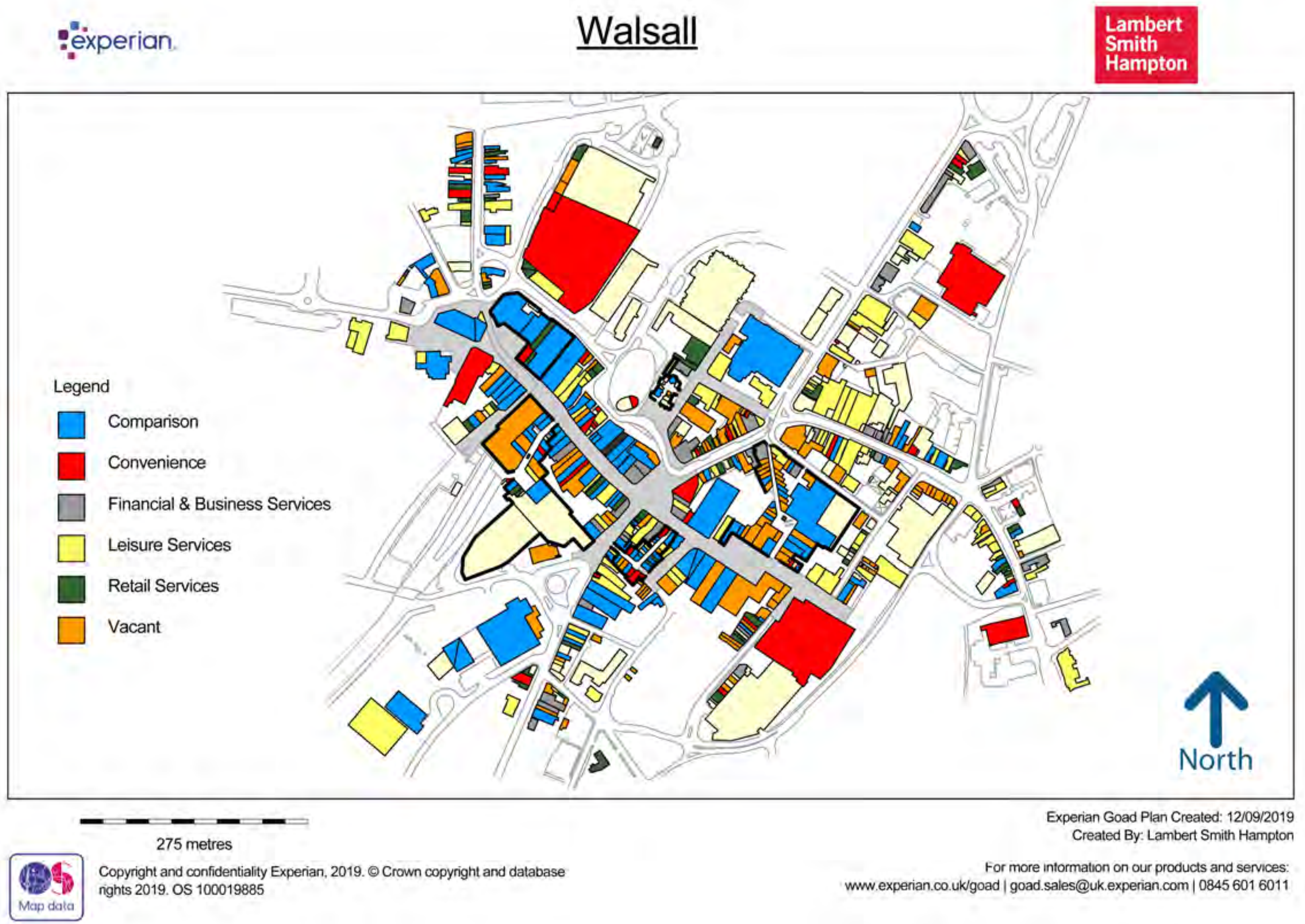
The Saddlers Centre

Bridge Street


The Bridge


Park Street

Diversity of Main Town Centre Uses (July 2019)



Lambert Smith Hampton

Diversity of Main Town Centre Uses – July 2019

Table 4: Number of Units in Walsall Town Centre (July 2019)

Category	No.	%	UK %*
Convenience	47	8.6	15
Comparison	119	21.7	36
Retail Service	83	15.1	7
Leisure Service	104	19.0	25
Financial and Business Service	50	9.1	8
Vacant	145	26.5	9
Total	**498**	**100**	**100**

Source: Goad survey 23/05/2020
*UK average from the Experian Goad Category Report, June 2018

Table 5: Floorspace in Walsall Town Centre (July 2019)

Category	Sq.m	%	UK %*
Convenience	30,073	20.3	9
Comparison	41,212	27.8	32
Retail Service	7,813	5.3	14
Leisure Service	28,856	19.5	24
Financial and Business Service	9,578	6.5	11
Vacant	30,537	20.6	11
Total	**158,970**	**100**	**100**

Source: Goad survey 23/05/2020
*UK average from Experian Goad Category Report, June 2018

Convenience Good Units

Walsall has a significantly high proportion of convenience retail. This is due to the presence of the three large supermarkets within the town centre boundary, as can be seen by the fact that the proportion is much greater in terms of floorspace than it is by number of units (where it is actually below the UK average). The centre is fortunate in having these supermarkets to anchor the town centre.

Comparison Good Units

The centre has an under-representation of comparison retail compared to the UK average. This is only a slight under-representation when measured by floorspace, but a significant variation in terms of number of units. This suggests that the centre has fewer but larger comparison stores. The land use analysis reveals a good mix by type of comparison units. There are indeed many new purpose-built retail units, especially in the new development adjacent to the Asda store. This means that the centre is in a strong position in providing quality modern accommodation, though this may be a vulnerability if several of these large stores become vacant. Indeed several such stores are vacant at present, which demonstrates a lack of demand for these larger spaces.

Retail Services

Walsall has a significantly greater number of retail service units than the national average; but a significantly lower amount when measured as floorspace. This is reflected in a large number of health and beauty related uses including small hairdressers and beauty salons.

Leisure Services

There are around 5% more leisure services in Walsall than the national average, both by number of units and floorspace. The greater proportion of these are takeaways and fast food restaurants. There is a distinct lack of higher quality leisure uses, such as restaurants and food and beverage facilities.

Financial and Business Services

The extent of financial and business services is similar to the national average in terms of number of units but in Walsall this in provided within a significantly higher proportion of floorspace (nearly double the national average). There are a number of relatively large estate agents (c. 300 m2) but there are no particularly units that are distorting this total. All of the major banks are present.

Lambert Smith Hampton

Proportion of Vacant Street Level Property

There is a very high amount of vacancies by any measure: 17.8% of the total floorspace is vacant (6.8 percentage points above the national average), and this represents a quarter of all the units (25.3%); the national average being 9%. This is clearly much worse than the national average, with 1 in 4 shops being vacant, and so represents one of the biggest challenges for Walsall. Vacant units are distributed throughout the centre but are particularly prevalent within the Old Square shopping centre, on Bridge Street and on the north-western end of Park Street.

Much of the town centre accommodation is now dated and often in a poor state of repair, including active units, demonstrating lack of investment in commercial property. There are also some new retail units on Digbeth that have yet to secure tenants.

There are some key vacancies: TJ Hughes which anchored the Saddlers Centre has recently closed which is likely to have a significant impact on other units here if a major new tenant is not found soon. The Marks & Spencer store also anchored both The Saddlers Centre and Park Parade and has recently closed. Debenhams remains active in the Old Square Shopping Centre but appears underutilised and there is already an accumulation of vacancies within the Centre. Some positive action has been taken: the former BHS store on Park Street is now occupied by an open plan space for small 'independent businesses' and appears to be well used. However, overall the town centre appears to be in a critical condition and at risk of further decline.

Left: the closure of TJ Hughes has a major impact on activity within the Saddlers Centre. Right: innovative new uses for a vacant store.

Lambert Smith Hampton

Customers' Views and Behaviour

A town centre engagement survey for Walsall was undertaken in February/March 2019. 2,369 respondents took part. The following key issues were highlighted:

- 90% residents surveyed visit the town centre;
- The majority (73%) travelled by car, a significant proportion (34%) arrived by bus, with 22% walking;
- Most people would visit the town centre more if it was cleaner and safer (91%) or had more/better quality shops (79%);
- For those that do not visit the town centre the main reasons for this were appearance/cleanliness (88%) and fear of crime/anti-social behaviour (80%).

NEMS have undertaken a telephone customer survey in support of this study. We have extrapolated from this zones 30, 31, 35, 36 and 37 as representing the main users of Walsall Town Centre (for these zones more than 25% identify Walsall as their location for comparison goods (fashion) shopping [Q22] and/or for other town centre uses [Q4] or when combining food shopping with other activities [Q6]). This then reveals the following (using weighted percentages):

- Most people visit foodstores at Walsall town centre by car (75-91% across all four zones as either driver of passenger)
- Most people do not combine visits to the foodstore with other activities in the town centre (57-73%)
- Of those that do combine with other activities the most popular are other food shopping (4-17%), non-food shopping (4-17%). No other activity polled on average above 5%.
- Most visit the town centre once a week or 2-3 times a week (36-44%);
- Most use the town centre for most of their shopping and town centre uses (57-72%)
- Things people liked most about the centre were that it was close to home (23-46%); had affordable shops (4-11%), good facilities in general (3-8%). 29% liked nothing about the centre.
- When asked what could be improved most said: more national multiples/high street shops (31-42%); more independent shops; and cleaner streets (15-18%).
- Those that live in these zone but never visit the centre are mostly put off by: poor range of shops (30-60% (except for zone 36 at 15%); and feeling unsafe (5-26%).
- Those that do not visit the centre for most of their shopping identified the following reasons why not: poor range of shops (30-44%) – listing high street retailers, independent shops and non-food shops separately; and feeling unsafe (7-22%).
- Popular leisure attractions include: restaurants/cafes (59-77%); cinema (42-60%); pubs/bars/clubs (38-50%); and theatre/music venues (19-40%).
- Of those visiting the cinema 43-69% visited The Light in Walsall town centre, by far the most popular choice.
- People generally visited Birmingham or Wolverhampton to go to the theatre.
- Walsall town centre was clearly the most popular choice for pubs/bars/clubs.

- Walsall town centre was also the most popular choice for restaurants (22-38%), though with strong competition from Birmingham (10-35%)and Lichfield (1-20%).
- When asked to suggest improvements to the leisure offer there was a wide variation of responses with clearest majority for ‘nothing’, though other relatively popular choices were cheaper prices (7-12%); more for children (1-13%); and ten-pin bowling (4-12%).

Retailer Representation and Intentions to Change Representation

Multiple retailers, such as Boots, Marks & Spencer and Primark, can act as anchor tenants in a centre and can add to its appeal and create additional pedestrian footfall. Experian Goad produces a list of the top comparison goods retailers, which acts as a measure of the vitality and viability of a centre.

Table 6 compares the number of top national retailers within Walsall Town Centre centre in 2019 and 2009. Walsall has 17 of the top 26 retailers present; nine are absent, however five of the top retailers present are at Crown Wharf (see below). Some of these retailers have experienced nationwide issues of entering administration and others have closed their Walsall stores as part of a wider consolidation strategy (e.g. M&S). In Walsall the surviving stores are mostly located in the three shopping precincts (especially Old Square) and on Park Place. The Debenhams store, although still open, appears to not be used to full capacity and was not attracting many customers on the day of the survey.

Crown Wharf Retail Park, one of the few examples of recent investment in and around the town centre, is located within the designated town centre boundary but operates quite independently as a separate retail park with its large expanse of customer parking. Several of the top retailers are located here (Argos, Clintons, River Island, Next, TK Maxx). It is likely that Crown Wharf attracts top retailers as a competitor to the town centre, and indeed several operators may have moved from previous town centre locations to Crown Wharf. This could be one of the causes of several large vacancies in Park Place, the Saddlers and Old Square shopping centres, especially the new units that are un-let. At present Crown Wharf has the feel of an out-of-centre retail park and feels quite divorced from the primary shopping area, although the recently adopted AAP seeks to improve integration and movement between both locations.

Table 6: Experian Goad list of Major Comparison Retailers

Retailer	Aug 2019
Argos*	Yes
Boots the Chemist	Yes
Burton	No
Carphone Warehouse	Yes
Clarks	Yes
Clintons*	Yes
Debenhams	Yes
Dorothy Perkins	No
H&M	No
HMV	No
House of Fraser	No
John Lewis	No
Marks & Spencer	No
New Look	Yes
Next*	Yes
O2	Yes
Primark	Yes
River Island*	Yes
Superdrug	Yes
TK Maxx*	Yes
Topman	No
Topshop	No
Vodafone	Yes
Waterstones	Yes
WHSmith	Yes
Wilkinsons	Yes

Source: WYG survey in July 2019
*at Crown Retail Park

Lambert Smith Hampton

Pedestrian Flows

The survey visit to the town centre was undertaken on a weekday (a market day), mid-morning on July 2019 (note that this was before the start of school summer holidays). This revealed the following:

- Low footfall on Lichfield Street;
- Low footfall on Bridge Street;
- Moderate footfall in the Old Square Shopping Centre, although this appeared to be people passing through without shopping;
- Moderate footfall on High Street, especially to/from Asda;
- Relatively high activity at the outdoor Market on Digbeth;
- High footfall on Digbeth, the Bridge (around the market) and linking to the bus station;
- Moderately high footfall on Park Street (there were no market stalls here but it was still busier than one may expect for a weekday); and
- Moderate footfall in the Saddlers Centre.

Data provided by the local authority reveals footfall of 143,000 people at Walsall Art Gallery in 2018-19 (the exact period is not stated). This compares with footfall of 207,588 for the same location in 2012-13, therefore representing a major reduction. Figures were also provided for the Saddlers Centre on a monthly basis. The most recent available is January 2019, with 466,618 – comparing to 525,955 for the same month in 2018: an 11% fall, though this is above the 455,177 figure for 2013.

Accessibility

Road Access:
The town centre is easy to reach by car, although approach roads often suffer from congestion. The town lies close to Junctions 9 and 10 of the M6 and the A4148 forms a ring road around much of Walsall. The town centre is within the northern part of the area enclosed by the ring road. It is accessible by several roads linking from the northern arm of the ring road, principally Wolverhampton Street, Green Lane, Lichfield Street and Sutton Road. The Tesco Extra is accessed directly off the ring road. Most car visitors therefore arrive from the north.

Car Parking:
There is a good range of parking in and around the town centre. Parking is well distributed, plentiful and moderately priced. This includes multi-storey car parks in the heart of the town centre: Sadlers Centre (£2 for 2 hours), Old Square (370 spaces, £2 for 2 hours), Walsall Station (118 spaces, £3.60 for 2 hours); surface car parks a little further out, e.g. Mountrath Street (126 spaces), Green Lane (47 spaces), Hatherton Road (£1.50 for 2 hours) and High Street (28 spaces); there are also private car parks for shoppers on the edge of the centre that also serve the town centre: Crown Wharf (650 spaces, £1.50 for 2 hours), Asda (free for shoppers), Morrisons (300 spaces, £2 for 2 hours), Jerome Retail Park (380 spaces, £1 for 2 hours).

Public Transport:
The centre is easily accessible by public transport and many shoppers arrive by bus. The bus station is located in the heart of the primary shopping area, at St Pauls Street and offers well used connections to surrounding areas. Walsall rail station is also within the centre, offering regular connections to Wolverhampton, Birmingham and surrounding areas. It is integrated within the Sadlers Centre, offering good potential for linked trips and increased footfall.

Walking, Cycling and Disabled Access:
The centre is generally easily accessible for pedestrians, with large parts being pedestrianised. There is a good pedestrian route from Morrisons onto Lichfield Street. There are several narrow alleys and pedestrian routes that are uninviting and may cause fear of crime concerns, routes also pass through some shopping centres past many vacant units. Certain parts, such as Bridge Street, suffer from heavy traffic and an abundance of safety barriers and measures that prioritise vehicular traffic over pedestrians. Standard DDA facilities are provided. There is very little cycle infrastructure.

Perception of Safety and Occurrence of Crime

Survey responses indicate that fear of crime is a significant issue that detracts visitors. In the previous 12 months (August 2018 to July 2019) the WS1 postcode had a reported 1,390 violent crimes, 312 instances of criminal damage, 532 instances of shoplifting and 554 accounts of anti-social behaviour and 93 thefts from the person. These figures indicate that there is some substance to fears of crime here.

Source: *UK Crime Stats*

Commercial Rents on Non-Domestic Property

The Promis report (August 2019) summarised the following:

- At end 2018, agent sources estimated prime rents in Walsall at £60 psf Zone A. This represents a 7.7% decline on the 2017 level of prime rents in the town compared to the PROMIS average decline of 3.5%.
- Agents confirmed a tone of £60-£70 psf Zone A for prime Park Street.
- Agents were unable to provide any recent evidence for The Saddlers, hence the tone of rents here remains £50-£60 psf Zone A as recorded at our previous 2016 audit.
- At the time of our 2018 audit, agents were unable to quote Zone A rents for Old Square Shopping Centre due to the high vacancy count and lack of interest in the centre from retailers.

Environmental Quality

The environmental quality of the primary shopping area is generally poor and un-co-ordinated. On the positive side the pedestrianised streets are wide and animated with markets stalls and other kiosks and informal uses. There are a few street trees, for example on Lower Hall Street, which is welcome green infrastructure. However, the public realm and street furniture is now looking dated, and could be better maintained and invested in. It is welcome that the market animates the streets but the stalls themselves are generally quite unattractive and create an untidy appearance. The informal street uses (e.g. ice cream vans, hot food vans etc) are poorly planned and sited and also make the centre look untidy and cluttered.

The built from is mixed: the main shopping streets include some historic character properties, some generic modern accommodation and some 1960s/70s units in poor condition. There is a particular concentration of poor quality 1960s/70s units with overhead canopies on Digbeth and High Street which creates a poor environment, particularly the CEX unit which frame this space and is highly visible. When the market is located this area looks particularly unattractive. The prevalence of vacant units add to the feeling of neglect and abandonment. The modern units are good quality if generic in form and generally positive additions, especially the store occupied by Primark which is prominently-sited opposite Lower Hall Street, but many of these new units are currently vacant.

The Art Gallery is a high profile example of quality contemporary architecture but its main focus is on the canalside, away from the retail core. On its ‘town centre’ side it sits within a rather low grade and featureless public space, surrounded by blank frontages, and somewhat hidden from Park Street. It therefore offers little wider benefit to the town centre environment or as a focus for activity and vibrance. The built form creates a feature building at the end of Park Street in a modern unit, which is fortunately not vacant (being occupied by Poundland and Puregym). At the other end of the high street, the vista to St Matthew’s church from High Street helps to create a landmark that aids legibility and identity.

The historic properties in the primary shopping area are not sufficient in number or concentration, and are not supported sufficiently by quality public realm, to create a distinctive positive character that would celebrate this important heritage and place. The most attractive part of the town centre is Lichfield Street, where street trees and good quality historic and new development creates a positive environment. Together with Leicester Street and Darwall Street this forms a Conservation Area. The focus here is civic and cultural rather than retail. Bridge Street is also the focus of a Conservation Area, although this is less evident when viewing its current condition and appearance.

Other outer streets often have a more secondary appearance, with units in converted historic residential properties or modern development. Stafford Street benefits from a higher proportion of historic properties. Bridge Street experiences heavier traffic and has narrow pavements and more mixed built form.

Left: poor environment on Digbeth   Right: positive view to St Matthew's Church from High Street

Lambert Smith Hampton

Digital Facilities in Walsall City Centre

The town centre benefits from many free Wi-Fi hotspots. The Saddlers Centre and Old Square Shopping Centre both have good quality, comprehensive websites that allow customers to understand the offer, however, you are unable to purchase goods or services from the portal.

Conclusions

This health check was undertaken based on a site survey and supporting documentary research. It has revealed significant issues for Walsall Town Centre. The centre is currently in a critical and vulnerable condition with 1 in 4 shops vacant. Crucially this includes several key anchors: the Marks & Spencer's and TJ Hughes stores which anchor the Saddlers Centre, and Park Street, have both recently closed. This must place the future of this shopping centre at risk if suitable new tenants cannot be found soon. In the Old Square Shopping Centre the Debenhams store is very under-utilised and must be seen as being at risk given that the firm is in administration. The failure of Debenhams to sufficiently anchor the shopping centre may be seen by the alarming concentration of vacancies in this location, with relatively few units being active. High Street/Park Street retains several major national operators and generates good signs of footfall, being well anchored by the Asda and Tesco stores, but is also experiencing an alarming prevalence of vacancies, especially at either end. Good quality recent accommodation has been provided in the primary shopping area but this has also failed to be fully occupied, which raises serious concerns. Although vacancies are high the town centre is generally retaining good diversity of uses but this must be at serious risk of deterioration given recent closures and national trends.

The development of Crown Point, on the edge of the centre and attracting several major national retailers and operating quite independently of the town centre with its own parking. Although this is within the town centre boundary it should be seen as a major threat to the high street as it is poorly integrated and not providing spill-over benefits to the primary shopping area. At best it is moving the centre of gravity of the retail core northwards. Jerome Retail Park is more secondary and traditional big-box retail typologies in nature and so less of a threat.

The supermarkets, although an asset for food shopping purposes, should also be seen as a threat as they offer many non-food goods and other services that compete with other traders. The Asda store in particular is very well integrated physically into the high street but does offer a café, pharmacy and clothes range. The Tesco Extra provides a full range of non-food related goods and services. The Morrisons store is smaller and located somewhat further from the primary shopping area.

There are opportunities that could be capitalised upon. Walsall has an extensive catchment population (163,000 Customer Base, Promis data 2019) sufficient to support a stronger town centre than exists currently (it is currently an 'average weak town' but one of the highest ranking of this category by population, Promis data 2019). It also has a high proportion of younger residents (Promis, 2019). The social grade profile of the catchment population (i.e. ABC1 representation) is considerably more affluent than the current profile of shoppers [Walsall Data / Evidence Base, Arcadis, 2019]. The key to improving the town centre will be to attract these younger, more affluent residents to the visit and spend in the town centre.

The majority of respondents in the shopper survey cite safety as a key reason why they don't visit the centre. Policy support in tier-two plans can help address this, such as emphasising 'Secured by Design' principles, e.g. in the Walsall Design SPD Policy DW2 Safe and Welcoming Places.

As summarised above, the town centre does not offer a high quality or distinctive physical environment in the retail core. This is an increasingly important factor in attracting visitors to a town centre experience, rather than providing a high street offer that aims only to compete with shopping online. To achieve this Walsall needs significant investment in the public realm and redevelopment or refurbishment of its worst frontages and removal or conversion of vacant properties. Creating a positive town centre experience will also require a much more developed and higher quality evening leisure economy and a co-ordinated programme of daily and weekly events. The outdoor market generates good footfall and helps to animate the town centre streets. This, and other informal street uses, should be better planned and organised within a functional public realm, with attractive stalls.

The town centre is highly accessible by bus and rail, with both respective stations being well integrated into the retail core. Car accessibility is good and parking is plentiful and well located, though providing free periods of parking or reduced prices would benefit the centre.

Action is being undertaken on these issues. The Council appointed Arcadis in September 2018 to prepare a masterplan for the town centre, which was published in July 2019[1]. The Council have also identified a budget of £600k to reduce parking charges, clean up the town centre and put on live shows and events. More significant actions, in the longer term will be identified in the masterplan for the following 10-20 years.

The town centre will require major restructuring and consolidation. Crown Wharf needs to be properly integrated into Park Street and the retail core. Asda and Tesco must continue to be well integrated with the retail core physically and functionally. The parking strategies at these stores will play an important role in supporting linked trips. The Art Gallery should be the focus of a quality evening leisure offer, linking with the retail core, and is well sited to achieve this. Serious consideration needs to be given to the future of all the indoor shopping centres, with a view to accommodating alternative non-retail or non-transactional uses. The extent of the linear high street should be reconsidered, with opportunities for mixed use development at its extremities, especially at the eastern end of High Street, being more distant from Crown Wharf. Outlying areas within the town centre should be encouraged to move away from retail use, so that retail can be successfully concentrated within the core, creating a critical mass there. Stafford Street, Ablewell Street and Bridge Street (east of Lichfield Street), for example, would appear to be appropriate for residential, community uses and business uses, with the specialist and secondary retail found here moving to within the retail core. Lichfield Street already has a successful civic/cultural focus. Rather than amending the current town centre boundary it is recommended that a more sophisticated approach is taken: clearly defining a consolidated retail core, surrounded by other quarters that have a clearly defined identity but with the flexibility to accommodate a wider range of uses. No doubt the Masterplan will make appropriate recommendations to address these points. We would also advise that land uses and physical changes to the function of the town centre are only part of the solution. A future regeneration strategy will need to be integrated with a medium to long term fiscal strategy which encourages new entrants to the market to help stimulate economic activity and innovation in the retail and leisure sector. The entrants need to be able to respond to the future needs of the community. This should also focus on improved digital technology to increases the town centres digital accessibility and audience.

[1] Walsall Town Centre Masterplan, July 2019, https://go.walsall.gov.uk/business/regeneration_and_investment/development_and_investment_opportunities/walsall_town_centre_masterplan

Lambert Smith Hampton

Appendix 6: LPA: Wolverhampton: Centre - Bilston

Lambert Smith Hampton

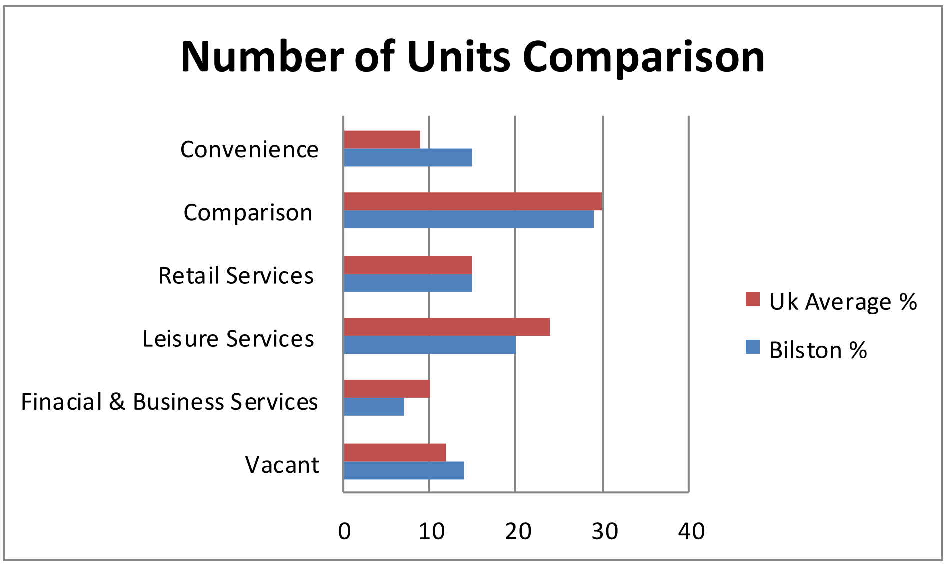
BILSTON TOWN CENTRE

ADDRESS (and Zone)	Bilston Town Centre[1]
DESCRIPTION	The Town centre is focused on the High Street, Church Street, Lichfield Street and Hall Street, with a large Morrisons supermarket located off the Black Country Route. The town centre is contained largely within the bounds of the Black Country Route to the south (except for Morrisons and the Bert Williams Leisure Centre which are located to the south of the route), the A4039 (west), Smith Street/ Batchroft/ Prouds Lane (north) and James Street (East). The primary shopping area (PSA)[2] is located within the bounds of Dudley Street/ Smith Street (west), Batchcroft (north) Walsall Street/ Church Street/ Hall Street (east) and Black Country Route (South).
CURRENT STATUS	Town Centre

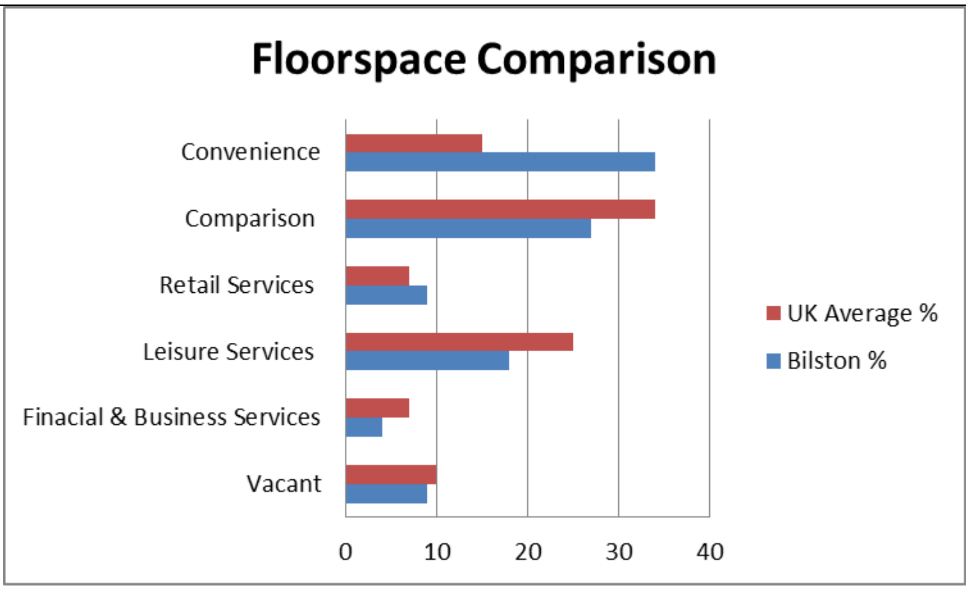
DIVERSITY OF USES	No.	Floor Space (sqm)	COMMUNITY FACILITIES	TOTAL: 7
Convenience	31	14,800	• Bilston Town Hall • Post Office • Bert Williams Leisure Centre • Bilston Methodist Church and Community Centre • St Leonard's Church • Citizens Advice	
Comparison	61	11,789	**NATIONAL MULTIPLES**	**TOTAL: 26**
Retail Service	32	3,437	• Argos • EE • Superdrug • Lidl • Morrisons • McDonalds • Age Uk • Barnados • Betfred • Cancer Research UK • Card Factory • Home Bargains • Iceland • Ladbrokes • Peacocks • Poundland • Poundzone • Shoe Zone • The Co-operative pharmacy • William Hill • Specsavers Opticians • Lloyds Bank • Barclays Bank • Nationwide Building Society	
Leisure Service	42	7,980		
Financial & Business Services	14	1,654		
Vacant	29	3,939		
Total No. Of Uses	**209**	**43,599**		

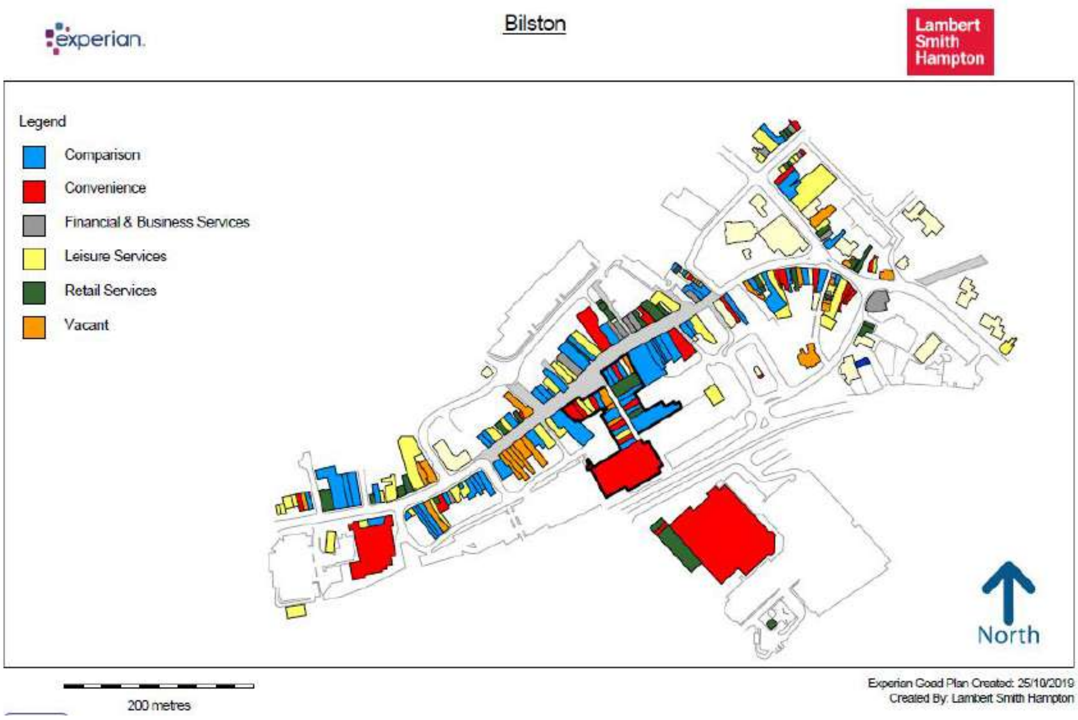
[1] As defined in Wolverhampton Proposals Map (2014) and Bilston Corridor Area Action Plan including Bilston Neighbourhood Plan (2014)
[2] As defined in Wolverhampton Proposals Map (2014) and Bilston Corridor Area Action Plan including Bilston Neighbourhood Plan (2014)

			• Greggs • Subway	

USES	The town centre has 209 commercial units that provide a range of main town centre uses[3]. In comparison to the national average[4] there is an under-representation of Leisure Services (20% compared to 24%) and an under-representation of Financial & Business Services (7% compared to 10%). The number of comparison goods units falls just below the national average (29% compared to 30%). The under representation of these services compared to the national average is also represented in floorsapce figures with Leisure Services (18% compared to 25%), figures for Financial & Business Services (4% compared to 7%) and figures for comparison goods (27% compared to 34%). The trend reverses with convenience goods sector being over-represented compared to the national average in terms of number of units (15% compared to 9%), and floorspace (35% compared to 15%). The doubling of the national average can be attributed to the large floorplates of Morrisons, which occupies an edge of centre location, and Lidl. 

[3] As defined in National Planning Policy Framework, Annex 2 – Page 68
[4] GOAD, all centres, 2018





The centre has a good range of national multiples with the outdoor markets and Morrisons providing the main anchor uses; though other large retailers such as Lidl also contribute a large amount of floorspace. The national multiples are distributed throughout the centre, with a mixture of charity shops, high street banks and low cost fashion brands. Bilston is in the relatively strong position of having two of the main national banks with Lloyds Bank located on Church Street and Barclays Bank located on Hall Street. The Bert Williams Leisure Centre also provides a leisure anchor use.

Bilston has a unit vacancy rate of 14%, just 2% above the national average vacancy rate.

Bilston's night time economy comprises The Sir Henry Newbolt pub, The Greyhound & Punchbowl pub, The Swan pub, Gills High Street Fish Bar, McDonalds on High Street and Café Metro and Chaplin's Fish and Chips on Church Street and The White Rabbit on Bankfield Road. This appears as an undersupply of night time uses given the size of the town, and it should be a priority to minimise

	any further reduction in evening activity generating uses. In broad terms there is an under representation of family orientated evening provision.
PEDESTRIAN FLOWS	Observations of pedestrian flows found that there were a reasonable number of pedestrians on High Street and Church Street with both Lidl and Morrisons appearing to be busy. Traffic levels on the surrounding street were low but approximately 2/3 of the on-street parking spaces were occupied.
ACCESSIBILITY	The High Street benefits from being partially pedestrianised, with wide pathways. High Street is accessible via a dropped kerb of Church Street and western end of High Street To the immediate south the town centre is bounded by the Black Country Route. South of the Black Country Route is defined by a mixture of educational, commercial and new build low rise residential buildings. To area to the west of A4039 is characterised by a retail park and low density residential housing. The areas to the north and east of the town centre are also characterised by low density residential housing with an industrial estate located to the north east of the town centre. The residents of Bradley, Moxley, Woods Bank (to the south), Lunt (to the east), Potrtobello, Stow Heath, All Saints (to the north) and Parkfield (to the west) also fall within the catchment of Bilston Town Centre. The town centre is high accessible by all modes of transport except mainline rail. A number of bus services pass through Bilston. Bilston's central bus station is located on Hall Street adjacent to High Street. Bus services are available to Wolverhampton, Walsall, Dudley and West Bromwich. Bilston is located on the West Midlands Metro line. The tram stop, Bilston Central, is located adjacent to the bus station and can be accessed by pedestrians via Church Street. The stop is serviced by a regular service to both Wolverhampton and Birmingham. The following make up the centre's parking provision: • c.240 spaces Pinfold Street – no restrictions • c.560 spaces Morrisons – 2 hours free (customers only) On street parking is generally only available on Church Street which features a mix of disabled and regular parking bays; these bays are restricted to 3 hours parking between 8.30am- 6.00pm, Monday-Saturday. Parking available at Batchcroft, Walsall Street, Mountford Lane, Bow Street and Hall Street also serves the town. Considering the size of Bilston there is a reasonable amount of parking available, all of which is free and in close proximity to the town centre.
PERCEPTION OF SAFETY	The centre appears safe, with most areas active and benefiting from natural surveillance, and active pedestrian routes generally overlooked. High Street and Church Street centre have the added benefit of CCTV cameras positioned at various points. The public houses (excluding the White Rabbit) and the majority of the restaurants/fast food outlets are located along the western end of High Street. It can be assumed that there would be little to no evening activity taking place in the central thoroughfare. In the evening this lack of natural surveillance and separation from passing traffic could potentially lead to anti-social behaviour. However, this is likely to be minimised by the CCTV cameras.
ENVIRONMENTAL QUALITY	The exterior of many of the buildings along High Street/Church Street are visually dated due to their 1960/70s precinct style. The public realm of Church Street is of a moderate to high quality, incorporating well maintained plants and street furniture at the centre's core. The quality of high Street appears poorer as it does not benefit from planting and street furniture.

	The shop frontages throughout the town are in an overall good condition, though some do appear dated. This observation is also acknowledged in the Area Action Plan, which highlights that the '*whilst parts of Bilston have been significantly improved, there remain areas where rundown buildings and sites detract from the attractiveness of the Town Centre as a destination for shopping and leisure activities'* and as such *'the perception of the town could be improved to attract visitors who may otherwise pass by'.* In terms of character, the local area is defined by a mixture of 60s and 70s style precinct commercial buildings. There are a number of early to mid-19th and 20th Century houses that have been converted to commercial units on High Street. The general condition of the pavement in the pedestrianised area appears to be good. Bilston is part of the WMCA Regional Town Centre Task Force which is helping bring forward regeneration, such as the purchasing of the derelict Pipe Hall. There are a number of listed buildings within the Town Centre Boundary including the Grade II* Greyhound and Punchbowl Inn on High Street, Grade II listed No. 83 Church Street and Former Lett's Estate Agents on Smith Street. The Area Action Plan seeks to ensure that Bilston's heritage assets are retained and can become the focus of new and improved public realm. The environmental quality in Bilston appears to have retained a similar standard to that reported in the 2014 Area Action Plan.
CUSTOMER'S EXPERIENCE AND BEHAVIOUR	The household telephone interview survey (HTIS) asked specific questions on respondents' views and perceptions of their local city or town centre. For those whose centre was Bilston Town Centre, the overwhelming majority of the respondents visited either every 2-3 days (25.9%) and one day a week (24.5%). Additionally, some 8.4% frequent daily; 6.6% monthly; 5.9% every 2-3 weeks and 7.4% 4-6 days a week. Only 7% of those who responded never visited the centre. Additionally of the sample who visited the centre some 67% used the centre for household shopping and town centre uses. In terms of what people 'like' about Bilston Town Centre, the most frequently raised themed are raised below:

Table 1: Bilston Town Centre: Top 'Likes'

Response	%
Close to home	43.3%
(Nothing / very little)	18.5%
The street market	16.9%
Affordable shops	14.5%
Easy to get to by bus	10.0%
Easy to get to by car	10.0%
Easy to park	9.2%
Attractive environment / nice place	8.9%
Good range of non-food shops	8.8%
Good food stores	7.5%
Close to work	6.3%
Good range of independent shops	5.3%
Good facilities in general	4.6%

Source: HTIS 2019

As the table shows the respondents (who frequented the centre) considered that there was a mix of things that they liked about the town centre. Notwithstanding this, proximity to home, the street market, the affordability of shop and access to the centre represent a draw to those that use the centre.

Respondents were also asked what, if anything, they would improve in Bilston Town Centre that might encourage them to visit more. The most frequent suggestions were as follows:

Table 2: Bilston Town Centre: Key Improvements

Response	%
More national multiple shops / High Street shops	26.6%
(Nothing)	25.0%
More independent shops	15.0%
Cleaner streets	12.7%
More / better comparison retailers (i.e. non-food shops)	12.1%
More / better public conveniences	11.5%
More / better value or affordable shops	8.8%
More / better food shops	8.2%
More / better places for eating out (e.g. cafes and restaurants)	6.4%
Better security / safety / more police	5.6%
More / better parking	5.4%
Street markets - better range and quality of offer	5.3%

Source: HTIS 2019

As the table shows a quarter of respondents suggest enhancing the retail offer (more multiple and independent shops) as well as cleaning the streets.

Of those whose nearest centre was Bilston Town Centre but who never visited the centre the top reasons cited broadly mirrored the improvements i.e. enhancing the retail offer as well as parking.

Table 3: Bilston Town Centre: Top Reasons for Not Visiting

Response	%
Poor range of shops	28.5%
Poor parking provision	13.9%
Poor quality shops	12.6%
Poor range of food stores	10.6%
Poor range of non-food shops	8.2%
Poor range of independent shops	8.0%
Too far away	5.3%
Just prefer to use other places	4.9%
Don't like town centres	4.6%
No reason to go there	4.4%

Source: HTIS 2019

CONCLUSION

Bilston's vacancy levels are just above the national average and the town has a fairly good mix of all retail and leisure uses.

Whilst there is an under provision of Leisure and Financial & Business services (in both unit and floorspace terms), there is an overprovision of Convenience Goods units and floorspace within the centre, the floorspace of these make up a sizeable percentage of Bilston's retail profile at just over double the national average (35% compared to 15%).

In addition to a range of main town centre uses there are a fair number of community facilities that support the town centre which help to contribute to the overall function and performance of the area.

The significant level of free parking and large number of bus services and tram services make Bilston

	highly accessible with all modes of transport. Bilston is performing relatively well in relation to its size, and provides vital services for local residents and visitors and is a vital and viable centre.
KEY ISSUES/SWOT	• **Strengths** o Good range of uses, good national multiple representation, maintaining size of retail core well; o Highly accessible by bus and tram; o Strong Convenience anchor in Morrisons and outdoor market; o Well maintained plants and street furniture in High Street; o A number of heritage assets in close proximity to the centre, providing character opportunities; o Bilston is part of the WMCA Regional Town Centre Task Force which is helping address the centre's weaknesses, such as the purchasing of the derelict Pipe Hall; and o The nearby Bilston Urban Village residential-led scheme is delivering large scale regeneration that can support the town centre. • **Weaknesses** o o Above average vacancy rate. o Some units are dated an in a poor state of repair; o Some poor pedestrian areas in secondary locations; o Lack of evening economy especially family orientated provision. • **Opportunities** o Encourage more family orientated evening activity uses, to enhance the evening economy; o Improve the façade of dated units; o Incentives for start-ups; o Improve the façade of the Shopping Centre and associated dated units; and o Creation/repurposing of existing street fronts/vacant units. • **Threats** o Further reduction in Comparison Goods retail could negatively impact the vitality and viability of the centre; o Competition from neighbouring centres; and o Lack of investment in the centre.
RECOMMENDED DESIGNATION	Bilston is identified as a town centre, which accurately reflects its role in the hierarchy of centres, and this should be maintained. The following could be explored through a tier-two plan review: **Centre Boundary** The existing boundary is defined by roads that encircle the town centre and provide a definitive physical barrier to the centre's boundaries. As such, no amendments to the town centre boundary are recommended. **Primary shopping area** The Primary Shopping Area designations are identified in the 2014 Area Action Plan. The designations capture the present day retail areas and therefore no amendment to the designation is recommended.

SUMMARY OF APPRAISAL

Background to the Bilston Town Centre Health Check Appraisal

Bilston is a small market town forming part of the Black Country and Greater Birmingham Region. The town is set to undergo significant change with the West Midlands Combined Authority (WMCA) approving funding for the regeneration of 5 town centres including Bilston. The funding will be used to support the Council's planned regeneration of the town centre which includes infrastructure improvements, focus on enhancing the historic core and improving the retail offer.

Sub-regional Shopping hierarchy

Designation as town centre is correct and reflects its broad role in the hierarchy of centres.

Diversity of main town centre uses

The diversity of uses analysis indicates below average representation across the majority categories of goods and services except for convenience stores where the provision is marginally higher (15% vs 9 %) and retail stores, which are in line with the national average at 15%.

Retailer Representation

The retailer representation across the centre is dominated by the independent sector and it is important to maintain the current level of multiple retailers to retain the attraction and vitality of the centre.

Proportion of vacant street level property

The Goad data indicates an approximate 14% vacancy rate, which is just above the national average. The Council have not released any monitoring data online.

Customer's views and behaviour

Respondents indicated the main improvements include enhancing the retail offer as well as parking. Additionally, safety and security is also raised as an issue.

Pedestrian Flows

Good pedestrian footfall was observed.

Accessibility

The town centre is high accessible by all modes of transport except mainline rail. The High Street is especially accessible via bus and tram as it is located in close proximity to both the bus station and the tram stop.

Perception of safety and occurrence of crime

High Street and Church Street are covered by CCTV. The remainder of the Town Centre benefits from natural surveillance during the day.

Commercial rents on non-domestic property

N/A

State of the environmental quality

In broad terms the environmental quality of the town centre is good. The public realm on Church Street includes varied planting and street furniture. The addition of planting and street furniture on High Street would further enhance the environmental quality.

Digital facilities in Bilston Town Centre

There is currently no provision of any central digital facilities such as Wi-Fi infrastructure within the town centre.

Strengths of Bilston Town Centre

- Good mix of national multiples and independent retailers

- Well maintained plants and street furniture in the centre
- The town centre is highly accessible with a good level of connectivity to the local bus and tram network
- A number of heritage assets in close proximity to the centre, providing character opportunities.

Appendix 7: LPA: Wolverhampton: Centre - Wednesfield

Lambert Smith Hampton

WEDNESFIELD TOWN CENTRE

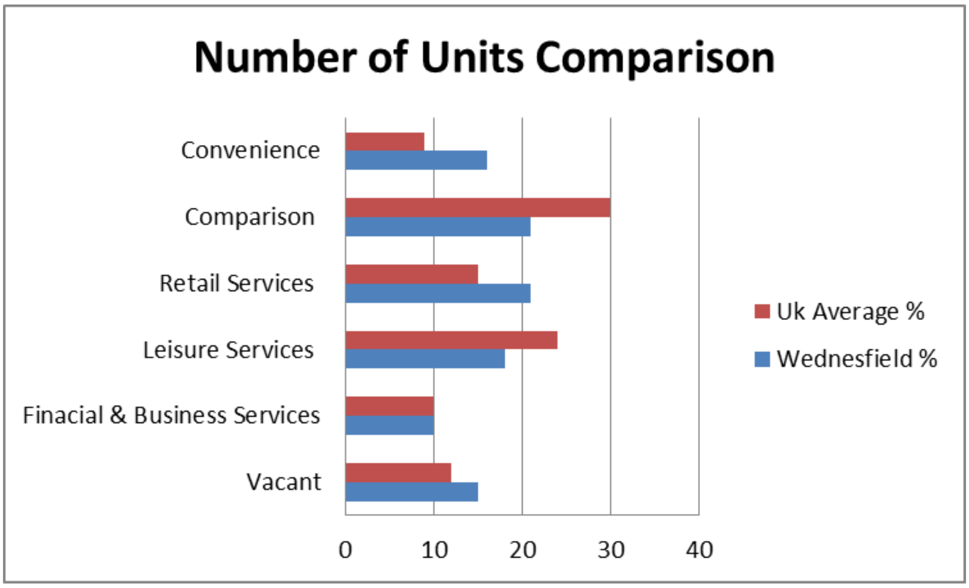
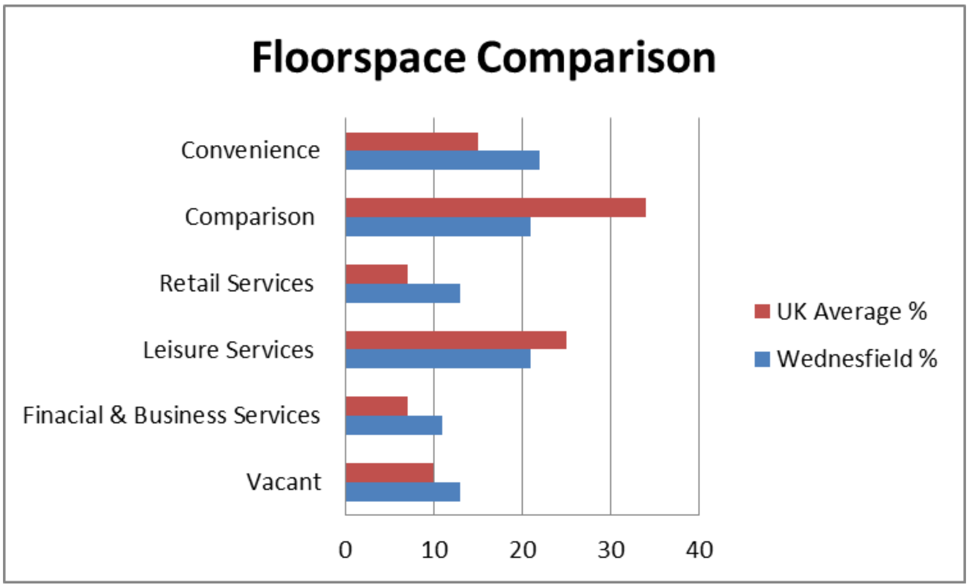
ADDRESS (and Zone)	**Wednesfield** Town Centre[1]
DESCRIPTION	The town centre is focused on the High Street, Alfred Squire Road, Rookery Street and Well Lane, with a large Sainsbury's located off Kenmare Way. The town centre is contained within the bounds of Kenmare Way and Alfred Squire Road to the south, Backhouse Lane to the west, the Wryley and Essington Canal to the north, Neachells Lane to the north east and Wells Lane to the south east. The primary retail[2] area is located within the bounds of High Street and Church Street.
CURRENT STATUS	Town Centre

DIVERSITY OF USES	No.	Floor Space (sqm)
Convenience	12	2,016
Comparison	15	1,997
Retail Service	15	1,226
Leisure Service	13	1,997
Financial & Business Services	7	1,087
Vacant	11	1,236
Total No. Of Uses	**73**	**9,560**

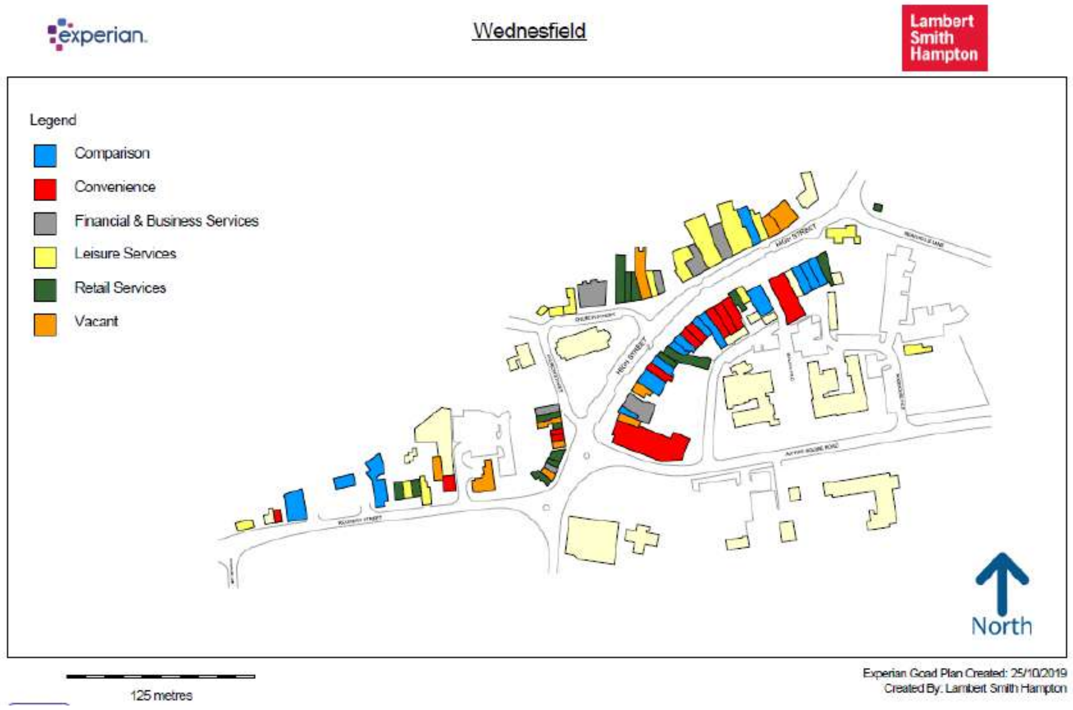
COMMUNITY FACILITIES	TOTAL: 7
• Wednesfield Community Centre and Library • Post Office • Guru Nanak Sikh Temple • Wednesfield Police Station • Kumon Study Centre • Evolution Childcare Nursery • St Thomas's Church	

NATIONAL MULTIPLES	TOTAL: 13
• Sainsbury's • Boots • Co-operative Travel • NatWest • Savers • Lloyds Bank • Your Move Estate Agents • Barclays Bank • Lloyds Pharmacy • Greggs • Nationwide • Age UK • Ladbrokes	

[1] As defined in Saved Policies from Unitary Development Plan (2006)
[2] As defined in Saved Policies from Unitary Development Plan (2006)

DIVERSITY OF USES	The town centre has 73 commercial units that provide a range of main town centre uses[3]. In comparison to the national average[4] there is an over-representation of convenience goods (19% compared to 16%). There is an under-representation of comparison goods units (21% compared to 30%) and an under-representation of Leisure Services (18% compared to 24%). When comparing the levels of floorspace it can be seen that although there may be few convenience goods stores they make up a fairly sizeable percentage of Wednesfield's floorspace at 22% which is higher than the 15% national average. This is attributed to the large floorplate of Sainsbury's (which is in an edge-of-centre location).  

[3] As defined in National Planning Policy Framework, Annex 2 – Page 68
[4] GOAD, all centres, 2018



The centre has a moderate range of national multiples (multiples), with Sainsbury's providing a main anchor use. The multiples are distributed throughout the centre, with a mixture of chain pharmacies and high street banks making up the majority of multiples. Wednesfield is in the good position of having three of the main national banks with Lloyds, NatWest and Barclays, plus an outdoor market.

The vacancy rate is above the national average at 15% (compared with 12% nationally).

Wednesfield's night time economy comprises The Boat Public House on Church Street, King Fryer on Church Street, The Angel Public House on High Street, The Royal Tiger on High Street and Dog & Partridge Public House on High Street. The current provision is centred primarily on pubs. In broad terms there is an under representation in family orientated evening provision.

PEDESTRIAN FLOWS

Observations of pedestrian flows found that there were low numbers of pedestrians on High Street and the surrounding streets. Traffic levels on the surrounding levels were moderate but most of the on-street parking spaces were occupied.

ACCESSIBILITY

The High Street is a pedestrian zone (Buses, taxis and Bicycles are permitted) and benefits from wide pathways. High Street is accessible via a series of dropped kerbs located along the length of the street.

To the north and west of the centre there is a substantial catchment area, characterised by low density residential homes. The east and south of the centre is characterised by retail and industrial business parks.

The following make up the centre's parking provision:

- c.460 spaces Sainsbury's– 2 hours free (Customers only)
- c.146 spaces Woodhouse Fold – 2 hours free

On street parking is generally only available on Queensway which features a mix of disabled and regular parking bays adjacent to St john the Baptist Church; these bays are restricted to 30 minutes parking between 7am-6pm, Monday to Saturday.

	Considering the size of Wednesfield there is a substantial amount of parking available, all of which is free. There is regular bus service to Wolverhampton City Centre.
PERCEPTION OF SAFETY	The centre appears safe, with most areas active and benefiting from natural surveillance, and active pedestrian routes generally overlooked. High Street and Church Street have the added benefit of CCTV cameras positioned at various points. With only two Public Houses being located along High Street and the reminder of the restaurants being located off High Street there is likely to be low evening activity in the central thoroughfare. Any potential anti-social behaviour due to lack of natural surveillance and separation from passing traffic is likely to be minimised by the presence of CCTV cameras.
ENVIRONMENTAL QUALITY	Many of the buildings along High Street are well maintained but visually dated due to their 1960s precinct style. The public realm of High Street is of a moderate to high quality, incorporating well maintained plants and street furniture at the centre's core. There are a number of permanent market stall structures along the southern side of High Street, which are in use on Tuesday, Wednesday, Friday and Saturday (8am-3.30pm). The shop frontages throughout the town are in an overall good condition, though some do appear dated. In terms of character, the local area is defined by a mixture of '60s and '70s style precinct commercial buildings. There are a number of early to mid-19th and 20th Century houses that have been converted to commercial units on Church Street. The general condition of the pavement in the pedestrianised area appears to be good. There are a number of listed buildings within the Town Centre Boundary including the Grade II listed 1, 3 and 5 Church Street, Grade II listed Bate Monument on Church Street , Grade II listed St Thomas Church, Grade II listed The Boat Public House and Brewhouse to the left of the pub and Grade II listed Dog and Partridge Inn. The Council should ensure that the heritage assets are retained and can become the focus of new and improved public realm.

CUSTOMER'S EXPERIENCE AND BEHAVIOUR	The household telephone interview survey (HTIS) asked specific questions on respondents' views and perceptions of their local city or town centre. For those whose centre was Wednesfield Town Centre, the overwhelming majority of the respondents visited either one day a week (44.9%); monthly (16.8%); every 2-3 days (14.7) and every two weeks (4.7%). Only 4.6% of those who responded never visited the centre. Additionally, of the sample that frequented the centre some 71% used the centre for household shopping and town centre uses. In terms of what people 'like' about Wednesfield Town Centre, the most frequently raised themes are set out below:

Table 1: Wednesfield Town Centre: Top 'Likes'

Response	%
Close to home	52.4%
Easy to park	22.7%
Close to friends or relatives	15.2%
Good range of non-food shops	12.5%
Familiar / know where everything is	9.4%
Good range of independent shops	7.5%
Traditional / historical	6.3%
(Nothing / very little)	6.2%
Easy to get to by bus	5.3%
Attractive environment / nice place	4.7%
Good library	4.7%

Source: HTIS 2019

As the table shows the majority of respondents considered the proximity to home, the ease of parking and the fact that the centre is close to friends/relatives as a draw to the centre.

Respondents were also asked what, if anything, they would improve in Wednesfield Town Centre that might encourage them to visit more. The most frequent suggestions were as follows:

Table 2: Wednesfield Town Centre: Key Improvements

Response	%
(Nothing)	45.6%
More national multiple shops / High Street shops	31.7%
More independent shops	16.2%
More / better comparison retailers (i.e. non-food shops)	5.8%
Better public transport	5.3%
Less homeless / beggars	4.7%

Source: HTIS 2019

As the table shows a high proportion of respondents suggest that no improvements were required as well as improving the High Street retail offer.

Of those whose nearest centre was Wednesfield Town Centre but who never visited the centre the top reasons cited was poor range of food stores and high street retailers.

Table 3: Wednesfield Town Centre: Top Reasons for Not Visiting

Response	%
Poor range of food stores	23.5%
Poor range of 'high street' retailers/ multiples	23.5%
Health / mobility reasons	19.7%
Poor range of shops	10.2%
Just prefer to use other places	9.2%
No reason to go there	9.2%
Like to spread out where I visit	8.6%

Source: HTIS 2019

CONCLUSION

Wednesfield's vacancy levels are just above the national average and the town has a fairly good mix of all retail and leisure uses. The above national average vacancy rates could be linked to the town's proximity to Bentley Bridge Retail Park, which attracts the big national brands, though linkages between the two have been improved in recent years through public realm improvements and the installation of a sculpture trail.

There is an under-representation of comparison goods units (21% compared to 30%) and of Leisure Services (18% compared to 24%). Though there are few convenience goods stores they make up a sizeable percentage of Wednesfield's floorspace at 22% which is higher than the 15% national average.

In addition to a range of main town centre uses there are a reasonable number of community facilities that support the town centre which help to contribute to the overall function and performance of the area.

The majority of shop fronts appear dated and would benefit from modernisation. The permanent market stalls restrict pedestrian flows on the High Street.

The significant level of free parking and bus services make Wednesfield accessible with all modes of transport.

Wednesfield is performing moderately well in relation to its size, and provides vital services for local residents and visitors and represents a vital and viable centre.

KEY ISSUES/SWOT

- **Strengths**
  - Good range of national multiple representation for a centre of its size;
  - Accessible;
  - Good provision of free parking;
  - Strong convenience anchor in Sainsbury's;
  - Strong Retail Service sector;
  - Well maintained plants and street furniture in High Street;
  - A number of heritage assets in close proximity to the centre, providing character opportunities; and
  - Outdoor market.
- **Weaknesses**
  - Although well-maintained there are several dated 1960s/70s shopping units;
  - Higher than average vacancy rates; and
  - Poor evening economy provision.
- **Opportunities**
  - Encourage more family orientated evening activity uses to enhance the evening economy;
  - Improve the façade of the dated units;
  - Creation/repurposing of existing street fronts/vacant units; and

	◦ Create incentive for start-ups. • **Threats** ◦ Reduction in Comparison Goods retail could negatively impact the vitality and viability of the centre, particularly given the centre's proximity to the Bentley Bridge Retail Park; ◦ Competition from neighbouring centres; and ◦ Lack of investment in the centre.
RECOMMENDED DESIGNATION	Wednesfield is designated as a town centre. Whilst the size of the town centre may be smaller than other Town Centres in the Black Country tier-2 hierarchy, Wednesfield performs an important strategic role, serving the shopping, community and civic needs of particularly the eastern area of Wolverhampton. Alongside Bilston, it is one of only two town centres within Wolverhampton's administrative area. Its designation therefore should be retained. The following could be explored through a tier-two plan review: **Centre Boundary** The existing boundary is defined by the bounds of Kenmare Way, Alfred Squire Road, Backhouse Lane, the Wryley and Essington Canal, Neachells Lane and Wells Lane. The boundaries create a definitive physical barrier to the centre's boundaries. As such, we recommend no amendments to the town centre boundary. **Primary shopping area** The Primary Frontage and Primary Shopping Area designations are identified in the 2006 Unitary Development Plan. The designations capture the present day retail areas and therefore we recommend no amendment to the designation.

SUMMARY OF APPRAISAL

Background to the Wednesfield Town Centre Health Check Appraisal

Wednesfield is a small town forming part of the Black Country.

Sub-regional Shopping hierarchy

Retention as a Town Centre in the hierarchy.

Diversity of main town centre uses

The diversity of uses analysis indicates below average representation across the majority categories of goods and services except for retail services and convenience stores where the provision is marginally higher (21% v 15% and 15% v 19%).

Retailer Representation

The retailer representation across the centre is characterised by a good mixture of multiple retailers and independent retailers. It is important to maintain the current level of multiple retailers to retain the attraction and vitality of the centre.

Proportion of vacant street level property

The Goad data indicates an approximate 15% vacancy rate, which is just above the national average. The Council's latest monitoring data (March 2019) indicates a vacancy rate of 8 units on the primary frontage.

Customer's views and behaviour

Respondents indicated the main improvements include enhancing the retail offer.

Pedestrian Flows

Low pedestrian footfall was observed on the High Street and surrounding streets.

Accessibility

The town centre is highly accessible by most modes of transport. The centre is especially accessible via bus and car due to large provision of free parking within the centre.

Perception of safety and occurrence of crime

High Street and Church Street are covered by CCTV. The remainder of the Town Centre benefits from natural surveillance during the day

Commercial rents on non-domestic property

N/A

State of environmental quality

In broad terms the environmental quality of the town centre is good. The public realm on High Street includes well maintained planting and street furniture.

Digital facilities in Wednesfield Town Centre

There is currently no provision of any central digital facilities such as Wi-Fi infrastructure within the town centre.

Strengths of Wednesfield Town Centre

- Good mix of national multiples and independent retailers
- Well maintained plants and street furniture in the centre
- The town centre is highly accessible with a good level of connectivity to the local bus network
- High level of free parking provision
- A number of heritage assets in close proximity to the centre, providing character opportunities.

Appendix 8: LPA: Dudley: Centre – Dudley

Lambert Smith Hampton

DUDLEY TOWN CENTRE

ADDRESS (and Zone)	**Dudley** Town Centre[1]
DESCRIPTION	The Town centre is focused on High Street and Castle Street, with other key areas Churchill Shopping Centre, Trident Shopping Centre and Plaza Mall. The town centre is bounded by Dudley Zoo and The Broadway to the north, The Belper, Stafford Street and Greystone Street to the west, Abberley Street and Martin Hill Street to the south and Duncan Edwards Way to the east. The shopping area[2] is located within the bounds of Duncan Edwards Way (east), New Mill Street (south and south west), Union Street (west), Stone Street and Tower Street (north west) and Dudley Bus Station (north).
CURRENT STATUS	Town Centre

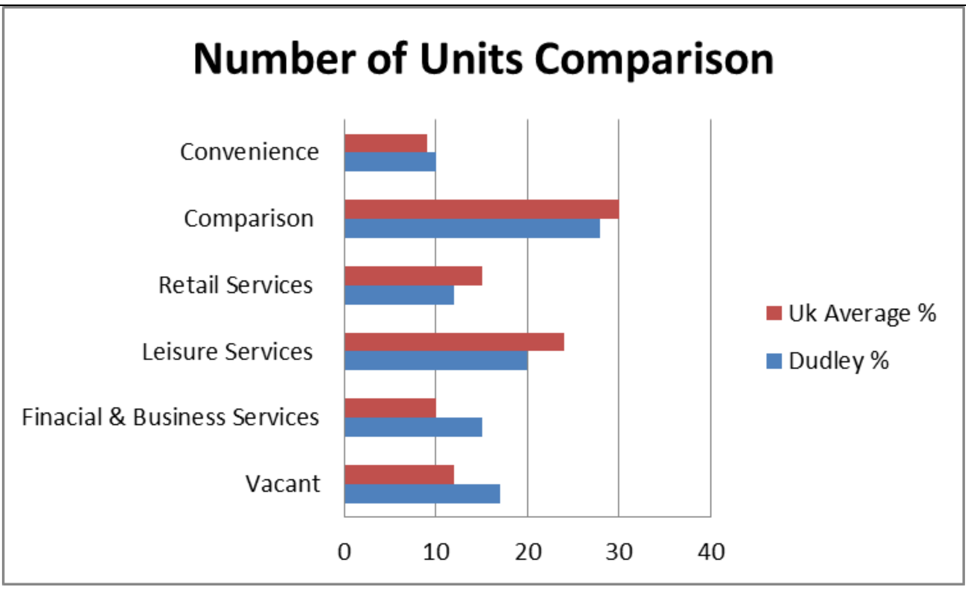
DIVERSITY OF USES	**No.**	**Floor Space (sq.m)**	**COMMUNITY FACILITIES**	**TOTAL: 18**
Convenience	37	10,201	• Dudley Zoo and Castle • Dudley Town Hall • Dudley parish Church • Dudley College of technology • Dudley College- Dudley Sixth Campus • Dudley Library • Post Office • Dudley URC Church • Mata Da Mandir Hindu Temple • St Edmund King & Martyr Church • Our Blessed Lady & St Thomas of Canterbury Catholic Church • Fairytales Day Nursery • Dudley Central Mosque • Dudley Assembly Hall of Jehovah's Witnesses • Unique Fitness 4 Ladies Only • Primal Performance Gym • Foundry Gym • Dudley Metropolitan Borough Council • Centre for Equality and Diversity	
Comparison	98	29,590	**NATIONAL MULTIPLES**	**TOTAL: 41**
Retail Service	42	4,125	• Argos • Boots • Wilko • New Look • River Island • Superdrug • Bonmarche • b&m • The Salvation Army • Lloyds Bank • Nationwide • William Hill	
Leisure Service	72	11,362		
Financial & Business Services	51	9,950		
Vacant	62	9,615		
Total No. Of Uses	**362**	**74,843**		

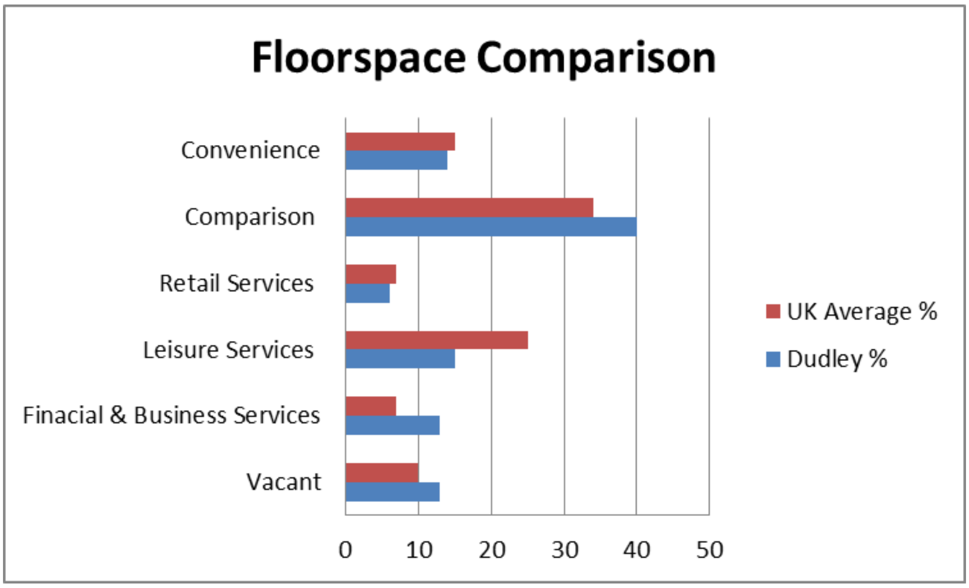
[1] As defined in Dudley Area Action Plan (2017)
[2] As defined in Dudley Area Action Plan (2017)

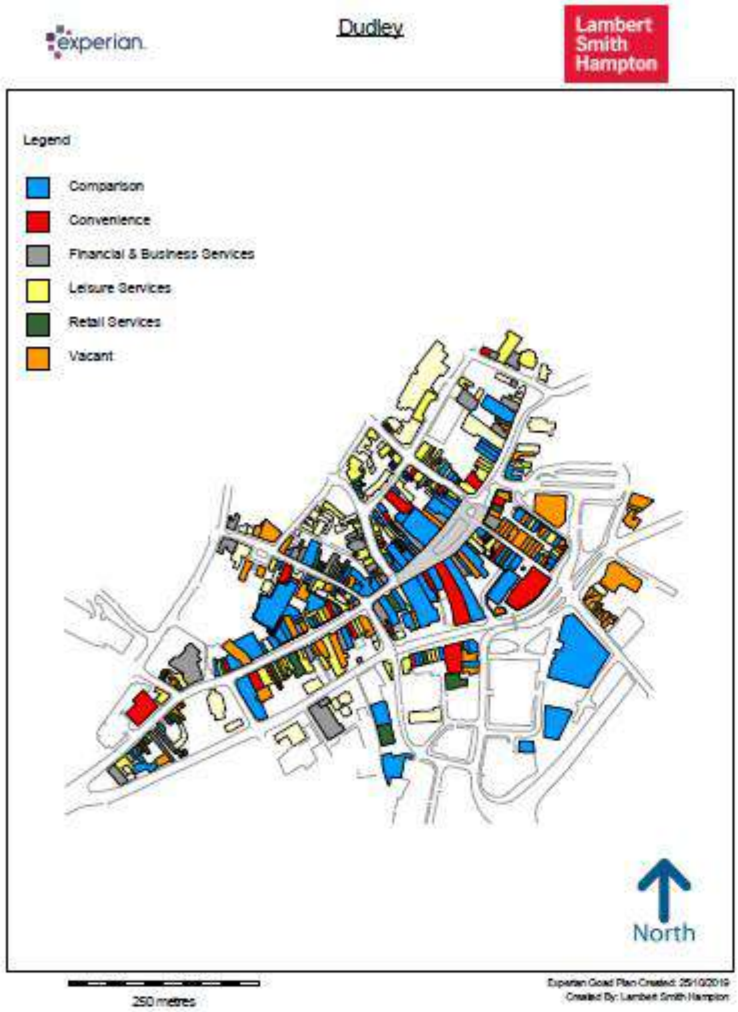
			• Barclays • Ryman's • Betfred • Oakland Furniture • CeX • Poundland • British Heart Foundation • Cancer research UK • Home Bargains • Greggs • Specsavers • Cash Convertors • Halifax • Card Factory • Costa Coffee • Holland & Barrett • Brighthouse • Iceland • Farmfoods • Asda • Dominos • Subway • Your Move Estate Agents • Co-operative Travel • HSBC • Shoe Zone • Ladbrokes • Santander • Peacocks • NatWest	

DIVERSITY OF USES	The town centre has 362 commercial units that provide a range of main town centre uses[3]. In comparison to the national average[4] there is an under-representation of retail services (12% compared to 15%) and an under-representation of Leisure Services (20% compared to 24%). These two services are also underrepresented in terms of floorspace; retail (6% vs. 7%) and leisure 15% vs 25%). A contributing factor to the under representation of leisure floorspace is that Dudley Leisure Centre is located just outside of the town centre boundary. When comparing the levels of floorspace it can be seen that although the number of comparison unit falls just below the national average (28% vs 30%), comparison goods stores make up a sizeable percentage of Dudley's floorspace at 40% which is higher than the 34% national average.

[3] As defined in National Planning Policy Framework, Annex 2 – Page 68
[4] GOAD, all centres, 2018


Number of Units Comparison
Convenience
Comparison
Retail Services
Leisure Services
Finacial & Business Services
Vacant
0
10
20
30
40
Uk Average %
Dudley %


Floorspace Comparison
Convenience
Comparison
Retail Services
Leisure Services
Finacial & Business Services
Vacant
0
10
20
30
40
50
UK Average %
Dudley %



The centre has a good range of national multiples (multiples), with ASDA providing a main anchor use, though other large retailers such as Iceland contribute a large amount of floorspace. The multiples are distributed throughout the centre, with a mixture fashion stores, home stores, charity shops and high street banks making up the majority of multiples. Dudley is in the strong position of having six of the main national banks with Halifax and HSBC located on Market Place, Barclays, Santander and Lloyds on High Street and NatWest on Castle Street.

The vacancy rate is above the national average at 17% compared with 12%.

Of the 33 commercial units contained within the Churchill Shopping centre 7 are vacant. 21% vacancy rate in the shopping centre is slightly above the vacancy rates for wider Dudley.

Dudley's night time economy comprises The Castle Public House on Castle Street; Finesse Desserts, The Full Moon Public House, The Little Barrel Public House, Queens Fish Bar, Dominos, Caspian Pizza, Brecks, Caledonian, Papa'z Pizza, The Venue, The Three Crowns Public House and Twice the Spice on High Street; The Old Glasshouse, The Olive Tree, The Saracens Head and Freemasons Arm on Stone Street and The Court House Public House, The Old Priory Public House, the Dessert Corner, the Grill House and Charlton House on New Street. The predominant provision is that of pubs. This appears as an undersupply of night time uses given the size of the town, a further reduction in evening activity generating uses should be avoided. The Old Glasshouse gastropub and The Olive Tree restaurant provide family suitable evening provision. However, in broad terms there is an under representation in family orientated evening provision.

PEDESTRIAN FLOWS	Observations of pedestrian flows found that there were a reasonable number of pedestrians on

	Castle Street, High Street and within the Shopping Centre. Traffic levels on the surrounding levels were low but most of the on-street parking spaces were occupied.
ACCESSIBILITY	The Shopping Centres and the various streets leading to and from it benefit from pedestrianisation. The central portion of High Street is pedestrianised, with wide pathways. Castle Street operates a one way system. High Street and castle Street are accessible via a series of dropped kerbs. The Churchill shopping centre is also accessible via Birdcage Walk, connecting the centre and the High Street to the bus station. To the immediate north, the centre is bounded by Dudley Zoo and The Broadway to the north. To the north there is a substantial catchment area characterised by low density residential homes. To the south, the centre is bounded by Abberley Street and Martin Hill Street. The southern catchment areas consist of a mixture of commercial units and low residential dwellings. To the west, the site is bounded by Belper, Stafford Street and Greystone Street and is characterised by low rise residential dwellings of Russells Hall. To the east, the centre is bounded by Duncan Edwards Way and is characterised by the low density residential properties of Dixons Green and Kates Hill. A large number of bus services pass through Dudley. Dudley's central bus station is located on Fisher Street, adjacent to the Churchill Shopping Centre. Bus services are available to Wolverhampton, West Bromwich, Merry Hill Shopping Centre and Birmingham City Centre; this helps to supplement the lack of a train station in the town. The following make up the centre's parking provision: • c.89 spaces Tower Street– 2 hours free • c.75 spaces Birmingham Street – 2 Pay and display hours £1.50 • c.211 spaces Flood Street Zone 1 – Pay and display £1.40 2 hours • c.142 spaces Flood Street Zone 2- 2 hours free • c.132 spaces Flood Street Zone 3- 2 hours free • c.136 spaces Flood Street Zone 4- 2 hours free • c. 14 spaces King Street Zone 1- Pay and display hours £1.50 2 hours • c.120 spaces King Street Zones 2 and 3 2 hours free • c.70 spaces Flood Street Zone 5- 2 hours free • c. 12 spaces New Mill Street- 2 hours free • c.200 spaces Trident Shopping- Pay and display £1.40 2 hours • c.22 spaces Wolverhampton Street- Pay and display £0.60 2 hours • c.15 spaces Ednam Road- 2 hours free • c.40 spaces Saint James's Road- Pay and display £1 2 hours • c.29 spaces Wolverhampton Street- 2 hours free • c.158 spaces Stafford Street (long stay)- 2 hours free • c.93 spaces Stafford Street (short stay)- Pay and display £1.40 2 hours • c.30 spaces Pitfield Street A- 2 hours free • c.37 spaces Pitfield Street B- 2 hours free On street parking is generally only available for a period of 30 minutes- 1 hour between 8a,-6pm within the centre. On street parking is located on Priory Road, New Street, Stone Street, St James's Street, Ednam Road, Trinity Road, Parsons Road, The Inhedge, Cross Street, High Street, Flood Street, king Street, Stafford Street, Cros Street and Edge Street. Considering the size of Dudley there is a substantial amount of parking available, much of which is free.
PERCEPTION OF SAFETY	The centre appears safe, with most areas active and benefiting from natural surveillance, and active pedestrian routes generally overlooked. High Street and Castle Street have the added benefit of CCTV cameras positioned at various points.

	Given that there are eight Public Houses located within the town centre, a level of evening activity is expected. However, the public houses are dispersed across the centre and therefore it is unlikely that there will be one area that will become the focus of the night time activity. The public houses are not located in the central portion of the High Street and therefore it can be assumed that there would be little to no evening activity taking place in the central thoroughfare. Given the dispersal of night time activity across the centre, the centre is considered to lack natural surveillance and the separation from passing traffic could potentially lead to anti-social behaviour. However, this is likely to be dissuaded by the CCTV cameras.
ENVIRONMENTAL QUALITY	Though the exterior of the Churchill and Trident Shopping Centres and many of the buildings along High Street/Castle Street appear dated due to their 1960s precinct style. The public realm of High Street/Hagley Street is of a moderate to high quality, incorporating well maintained plants and street furniture at the centre's core. However, there are a number of permanent market stall structures along the centre of Market Place. As permanent structures (though they are only in use Monday-Saturday (10am- 4pm)) they present themselves as visual and pedestrian obstructions when not in use. The shop frontages throughout the town are in an overall good condition, though some do appear dated. The shop frontages throughout the town are in an overall good condition, though some do appear dated and in need of refurbishment. This observation is also acknowledged in the Area Action Plan, which highlights the *'refurbishment and renewal of town centre buildings and of the public realm'* as a key objective (paragraph 3.3, p.7). In terms of character, the local area is defined by a mixture of 60s and 70s style precinct commercial buildings. There are a number of early to mid 19th and 20th Century houses that have been converted to commercial units on Castle Street, Priory Road and New Street. The general condition of the pavement in the pedestrianised area appears to be good. Dudley Town Centre has been designated as a Conservation Area. There are a number of listed buildings within the Town Centre Boundary, including: • Dudley Zoo houses a number of Grade II, Grade II* structures; • Dudley Castle is a scheduled monument; • Grad II listed Jehovah's Witness Hall and St Edmund's Church of England School on Castle Hill; • Grade II listed 2 The Broadway, 6, 7 and 7A The Broadway and Grade II Listed Fellows Club on The Broadway; • Grade II listed 270-272 Castle Street; • Grade II State of the Earl of Dudley on Castle Street; • Grade II listed Conservative on Castle Street; • Grade II* listed Church of St Edmund and Grade II listed church wall on Castle Street; • Grade II Baylie's Charity School on Tower Street; • Grade II Roman Catholic Church of Our Lady and St Thomas on St Josephs; • Grade II listed Priory House, Council House and Charlton House on Priory Road; • Grade II* listed Town Hall, Coroners Court, Former sessions Court and Brooke Robinson Museum on Stone Street; • Grade II listed public library, the old police buildings, The Saracens head public house, 1-2 Stone Street and 21 and 21A Stone Street; • Grade II listed 222A and 223 High Street; • Grade II* listed Parish Church of St Thomas and Drinking Fountain and Grade II Brooks Brothers Warehouse on New Street; • Grade II listed 1, 3, 3A 4, 5, 6, 7 205, 206 207-210 Wolverhampton Street. The Area Action Plan seeks to enhance the distinctive local character, architectural and historic interest of Dudley Town Centre, including buildings, character areas, open spaces and the public realm (paragraph 11.15, p.79).

The heritage assets contribute to historic character of Dudley and Dudley town centre. For example, the conversion of the old fire house to offices and the Old Glass House pub have ensured that the historic building can contribute to the historic character of Dudley.

The environmental quality in Dudley appears to have retained a similar standard to that reported in the 2017 Area Action Plan.

CUSTOMER'S EXPERIENCE AND BEHAVIOUR

The household telephone interview survey (HTIS) asked specific questions on respondents' views and perceptions of their local city or town centre. For those whose centre was Dudley Town Centre, the overwhelming majority of the respondents visited either one day a week (19.1%); every 2-3 days (16.4%) and monthly (14.1%). Additionally some 11.1% frequented every two weeks. Only 13% of those who responded never visited the centre. Additionally of the sample who visited the centre some 53% used the centre for household shopping and town centre uses.

In terms of what people 'like' about Dudley Town Centre , the most frequently raised themed are raised below:

Table 1: Dudley Town Centre: Top 'Likes'

Response	%
(Nothing / very little)	40.1%
Close to home	28.1%
The street market	8.3%
Good range of non-food shops	7.2%
Traditional / historical	4.5%
Good range of 'high street' retailers/ multiples	4.1%

Source: HTIS 2019

As the table shows the majority of respondents (who frequented the centre) considered that there was very little that they liked about the town centre. Notwithstanding this, proximity to home, the street market and the range of non-food shops represent a draw to those that use the centre.

Respondents were also asked what, if anything, they would improve in Dudley Town Centre that might encourage them to visit more. The most frequent suggestions were as follows:

Table 2: Dudley Town Centre: Key Improvements

Response	%
More national multiple shops / High Street shops	34.3%
More independent shops	22.7%
(Nothing)	18.7%
Free car parking	10.8%
More / better parking	10.5%
Street markets - better range and quality of offer	10.4%
Cleaner streets	9.8%
More / better comparison retailers (i.e. non-food shops)	7.5%
Make it more attractive / revamp it	4.8%

Source: HTIS 2019

As the table shows a high proportion of respondents suggest enhancing the retail offer (more multiple and independent shops and better quality market offer) as well as free/ more car parking.

Of those whose nearest centre was Dudley Town Centre but who never visited the centre the top reasons cited broadly mirrored the improvements i.e. enhancing the retail offer as well as parking and quality of the environment. Additionally, safety and security is raised as an issue.

Lambert Smith Hampton

Table 3: Dudley Town Centre: Top Reasons for Not Visiting

Response	%
Poor range of shops	36.3%
Poor range of non-food shops	13.3%
Poor quality shops	12.0%
Feels unsafe	10.8%
Poor parking provision	10.4%
Poor range of food stores	9.6%
Poor facilities in general	6.8%

Source: HTIS 2019

CONCLUSION

Dudley's vacancy levels are just above the national average and the town has a fairly good mix of retail and leisure uses. The above national average vacancy rates could be linked to the town's proximity to Merry Hill Shopping Centre, which attracts the big national brands.

Whilst the number of comparison unit falls just below the national average, the floorspace of these units make up a sizeable contribution of Dudley's retail profile, above the national average.

In addition to a range of main town centre uses there are a reasonable number of community facilities that support the town centre which help to contribute to the overall function and performance of the area.

The shopping centres appear dated and would benefit from a redevelopment/refurbishment of the physical structures to modernise their 60's/70's style.

The significant level of free parking and large number of bus services make Dudley highly accessible with all modes of transport.

Dudley is performing relatively well in relation to its size, and provides vital services for local residents and visitors and has strong signs of vitality and viability.

KEY ISSUES/SWOT

- **Strengths**
    - Good range of uses, good national multiple representation, contributing to mix of uses in the core retail area;
    - Highly accessible, especially by bus;
    - Dudley Town Hall/Concert Hall
    - Strong Retail Service sector;
    - Well maintained plants and street furniture on High Street/Hagley Street.
    - A number of heritage assets in close proximity to the centre, providing character opportunities.
    - Free parking
    - Large number of community facilities
- **Weaknesses**
    - Dated shopping centres and 1960s/70s shopping units;
    - High vacancy rates
    - Fixed market Stalls are a visual and physical obstruction when not in use; and
    - Some poor pedestrian areas in secondary locations
    - Lack of a large anchor convenience retail superstore to prevent further retail decline and enhance the centre's vitality and viability
- **Opportunities**
    - Encourage more family orientated evening activity uses to enhance the evening economy;
    - Improve the façade of the Shopping Centres and dated units.
    - Creation/repurposing of existing street fronts/vacant units.

	• **Threats** ○ Any further reduction in comparison goods retail could negatively impact the vitality and viability of the centre. ○ Competition from neighbouring centres. ○ Lack of investment in the centre.
RECOMMENDED DESIGNATION	Dudley is identified as a town centre, which accurately reflects its role in the hierarchy of centres, and this should be maintained. The following could be explored through a tier-two plan review: **Centre Boundary** The existing boundary is defined by Dudley Zoo and The Broadway to the north, The Belper, Stafford Street and Greystone Street to the west, Abberley Street and Martin Hill Street to the south and Duncan Edwards Way to the east. The Town Centre boundaries are relatively clearly defined. As such, no amendments to the town centre boundary are proposed. **Primary shopping area** The Primary Frontage and Primary Shopping Area designations are identified in the 2017 Area Action Plan. The designations capture the present day retail areas and therefore no amendment to the designation is proposed.

SUMMARY OF APPRAISAL

Background to the Dudley Town Centre Health Check Appraisal

Dudley is a large market town forming part of the Black Country and Greater Birmingham Region. The town is set to undergo significant change with the Council seeking investment partners to deliver residential, retail, leisure and commercial development. Additionally, the Council plans to deliver a new Bus Interchange and a new Institute of Technology. The investment projects seek to improve the connectivity of Dudley and promote the town centre, consequently improving footfall in the town centre. The town is also a recipient under the government's Future High Streets Fund. It therefore represents a town that is earmarked for future growth.

Sub-regional Shopping hierarchy

Designation as town centre is correct and reflects its broad role in the hierarchy of centres.

Diversity of main town centre uses

The diversity of uses analysis indicates below average representation across all categories of goods and services except for financial services where the provision is marginally higher (15% vs 10%).

Retailer Representation

The retailer representation across the centre is characterised by a good mixture of multiple retailers and independent retailers. It is important to maintain the current level of multiple retailers to retain the attraction and vitality of the centre.

Proportion of vacant street level property

The Goad data indicates an approximate 17% vacancy rate, which is above the national average.

Customer's views and behaviour

Respondents indicated the main improvements include enhancing the retail offer as well as parking and quality of the environment. Additionally, safety and security is also raised as an issue.

Pedestrian Flows

Good pedestrian footfall was observed.

Accessibility

The town centre is high accessible by all modes of transport except rail. The High Street is especially accessible via bus as it is located in close proximity to Dudley Bus Station. The proposed extension of the Midlands Metro tram line through Dudley town centre and the delivery of the new Bus Interchange will further enhance Dudley's transport connections.

Perception of safety and occurrence of crime

High Street and Castle Street are covered by CCTV. The remainder of the Town Centre benefits from natural surveillance during the day.

Commercial rents on non-domestic property

N/A

State of the environmental quality

In broad terms the environmental quality of the town centre is good. The public realm includes varied planting and street furniture. The permanent market stall structures on High Street are a visual and physical obstruction when not in use.

Digital facilities in Dudley Town Centre

There is currently no provision of any central digital facilities such as Wi-Fi infrastructure within the town centre.

Strengths of Dudley Town Centre

- Good mix of national multiples and independent retailers
- Well maintained plants and street furniture in the centre
- The town centre is highly accessible with a good level of connectivity which is set to be enhanced further with the interchange transport hub regeneration and the extension of the Midlands Metro.
- A number of heritage assets in close proximity to the centre, providing character opportunities.

Appendix 9: LPA: Dudley: Centre - Stourbridge

Lambert Smith Hampton

STOURBRIDGE TOWN CENTRE

ADDRESS (and Zone)	Stourbridge Town Centre[1]
DESCRIPTION	The Town centre is focused on High Street, Lower High Street, Market Street and Coventry Street, with other key areas Ryemarket Shopping Centre and The Crown Centre. The town centre is bounded by Bath Road, High Street and St John's Road to the north, St John's Road, A458, Foster Street East and Vauxhall Road to the east, New Road to the South and Bath Road to the West.
CURRENT STATUS	Town Centre

DIVERSITY OF USES	**No.**	**Floor Space (sq.m)**
Convenience	25	11,734
Comparison	90	21,052
Retail Service	47	4,459
Leisure Service	57	17,633
Financial & Business Services	36	5,769
Vacant	25	3,698
Total No. Of Uses	**280**	**64,345**

COMMUNITY FACILITIES **TOTAL: 14**

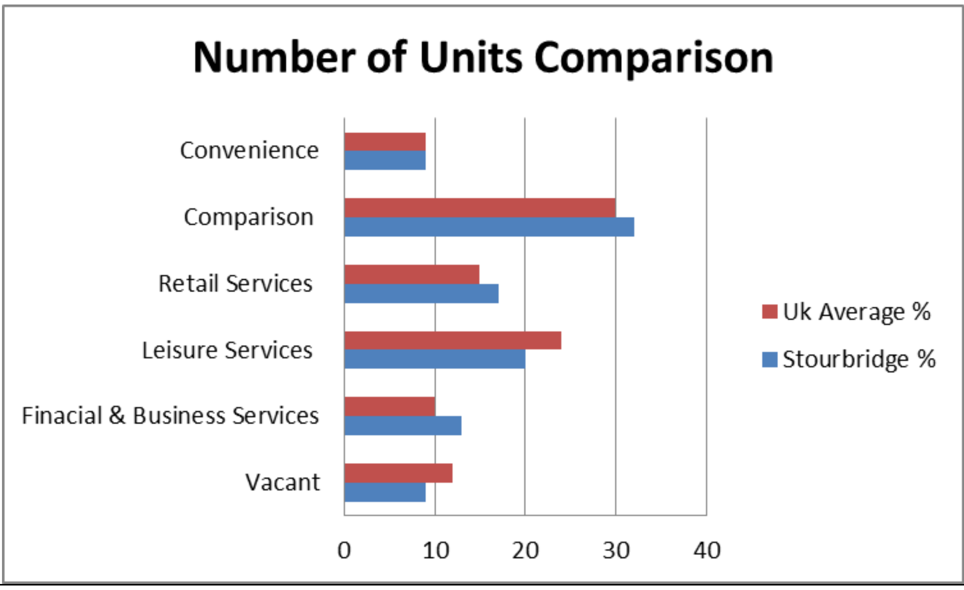
- Post Office
- Stourbridge Library
- Stourbridge Town Hall
- Pure Gym
- Explore Learning
- Crystal Leisure Centre
- King Edwards VI College
- St Thomas' Church Stourbridge
- Citizens Advice Stourbridge
- Stourbridge Old Edwardians Club
- The Stourbridge Institute Social Club
- Stourbridge Music Centre
- Shooting Stars Nursery
- Unitarian Chapel Stourbridge

NATIONAL MULTIPLES **TOTAL: 46**

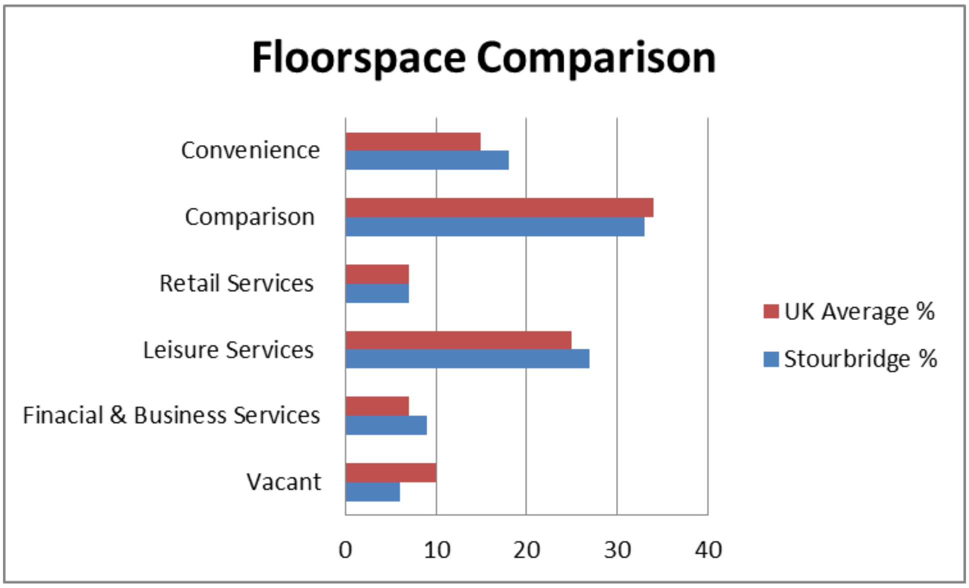
- Argos
- W H Smith
- Wilkos
- Tesco
- Waitrose
- Carphone Warehouse
- Card Factory
- The Works
- Costa Coffee
- Boots
- Hallmark
- Holland & Barrett
- CEX
- Iceland
- Poundland
- Peacocks
- Home Bargains
- Shoe Zone
- The Salvation Army
- PDSA
- Barnados

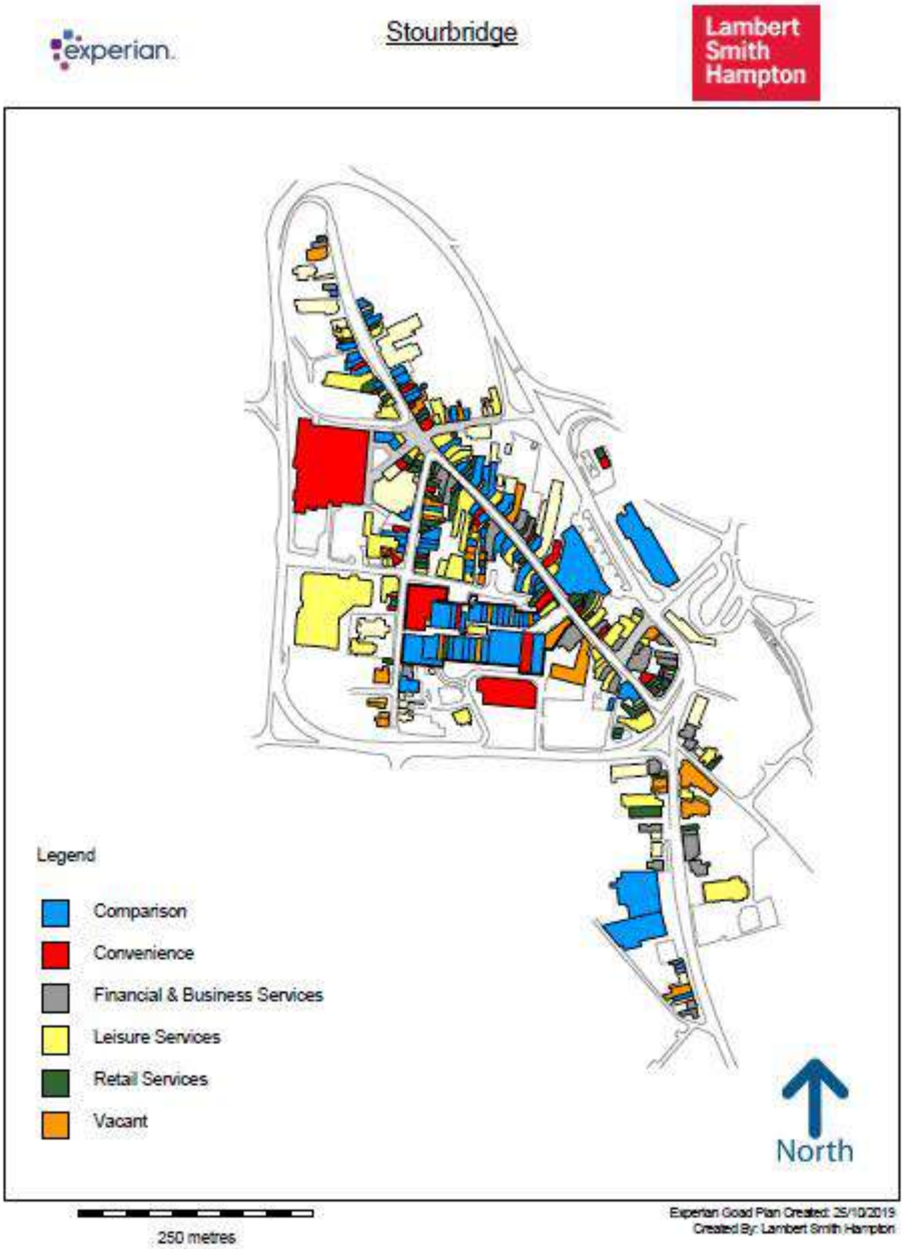
[1] As defined in Stourbridge Area Action Plan (2013)

			• Timpson • Oxfam • NatWest • Cash convertors • British Heart Foundation • Lloyds Bank • Halifax • Thomson • Yorkshire Building Society • William Hill • Savers • Café Nero • Coral • Greggs • Co-operative Travel • Specsavers • HSBC • Santander • TSB • Barclays • Nationwide • Aldi • Pizza Express • Handelsbanken • Subway • Scope	

DIVERSITY OF USES	The town centre has 280 commercial units that provide a range of main town centre uses[2]. The convenience goods provision is in line with the national average at 9%. In comparison to the national average[3] there is an under-representation of leisure services (20% compared to 24%) and an over-representation of Retail Services (17% compared to 15%) and comparison goods units (32% compared to 30%). When comparing the levels of floorspace it can be seen that although the number of leisure services units falls below the national average (20% vs 24%), leisure services make up a reasonable percentage of Stourbridge's floorspace at 27% which is higher than the 25% national average. 

[2] As defined in National Planning Policy Framework, Annex 2 – Page 68
[3] GOAD, all centres, 2018


Floorspace Comparison
Convenience
Comparison
Retail Services
Leisure Services
Finacial & Business Services
Vacant
0
10
20
30
40
UK Average %
Stourbridge %



The centre has a good range of national multiples (multiples), with Tesco providing a main anchor use, though other large retailers such as Waitrose and Aldi contribute a large amount of floorspace. The multiples are distributed throughout the centre, with a mixture of home stores, charity shops and high street banks making up the majority of multiples. Stourbridge is in the strong position of having seven of the main national banks with Halifax, HSBC, Lloyds, NatWest, TSB and Barclays located on High Street, Santander on Foster Street East and Handelsbanken on Market Street.

The vacancy rate is below the national average at 9% compared with 12%.

Stourbridge's night time economy comprises The Chequers Inn Public House, Claptrap the Venue (live music and comedy), The Stourbridge Lion Public House, Pizza Express, Cock 'N' Bull Co., The Talbot Hotel, Bella Rose Café, The Old Bank Public House, Ronnie's Wood Fired Pizza, Stourbridge Pizza Kebab, Tropical Spice Indian and Paprika Authentic Indian Cuisine on High Street; Red House Boutique, Romino's Pizzas and Delightful Desserts on Foster Street East; The Bell Public House, Moliano's and Barbridge on Market Street; VGN Boulevard and French Connection Bistro on Coventry Street; The Mitre Inn, Cellars Cuisine, Bombay Pickles and No1 Pizza Stourbridge on Lower High Street; Vesuvio Italian Restaurant on Victoria Passage; Taste Healthier, Soprano's Pizza and Yummies

	on Bell Street. There is a reasonable supply of night time uses given the size of the town and any further reduction in evening activity generating uses should be avoided.
PEDESTRIAN FLOWS	Observations of pedestrian flows found that there were a reasonable number of pedestrians on High Street and within the Shopping Centre. Traffic levels on the surrounding levels were low but most of the on-street parking spaces were occupied.
ACCESSIBILITY	The main entrance to the Shopping Centre is via pedestrianised forecourt off High Street, with a secondary entrance from Talbot Street. High Street, Lower High street and Market street are not pedestrianised and have narrow pathways. Castle Street operates a one way system. The streets are accessible via a series of dropped kerbs. To the immediate north, the centre is bounded by Stourbridge Football Club and retail park whilst further north are low density residential dwellings. To the east, the town centre is bounded by low density residential dwellings. To the south, the centre is bounded by the low density residential dwellings of Oldswinford and Norton. To the west, the centre is bounded by the low density residential dwellings of Gigmill and Wollaston. A large number of bus services pass through Stourbridge. Stourbridge Interchange station is located on Foster street East, adjacent to Stourbridge Town Station. Bus services are available to Wolverhampton, Dudley, Birmingham City Centre and Merry Hill Shopping Centre. Stourbridge Town Station provides a frequent shuttle service to Stourbridge Junction. Stourbridge Junction provides rail services to Birmingham, Worcester, Kidderminster and London. The following make up the centre's parking provision: • c.20 spaces Victoria Street– Pay and Display (£2 2 hours) • c.70 spaces Aldi- 2 hours free (customers only) • c.215 spaces Ryemarket Multi-Storey- 1 hour free • c.205 spaces Ryemarket Multi-Storey- 1 hour free • c.10 spaces Coventry Street- 2 hours free • c.550 spaces Tesco Extra- 2 hours free • c. 80 spaces Church Street- Pay and Display • C. 55 spaces Birmingham Street- Pay and Display • C. 30 spaces Crown Lane- Pay and Display On street parking is located on High Street, Lower High Street, Drury Lane, Crown Lane, Worcester Street, Hagley Road, Union Street, Lion Street and Vauxhall Road. On Street parking is typically only available for 1-2 hours (depending on the road) Monday- Saturday 8am-6pm or 7am-7pm. Considering the size of Stourbridge there is a substantial amount of parking available, much of which is free.
PERCEPTION OF SAFETY	The centre appears safe, with most areas active and benefiting from natural surveillance, and active pedestrian routes generally overlooked. High Street, Lower High Street and Market Street have the added benefit of CCTV cameras positioned at various points. Given that there are a number of Public Houses, restaurants and pubs located within the town centre, a level of evening activity is expected. However, the night time uses are dispersed across the centre and therefore it is unlikely that there will be one area that will become the focus of the night time activity. The night time activity is relatively concentrated in the centre; this combined with the CCTV coverage is likely to dissuade any anti-social behaviour.

ENVIRONMENTAL QUALITY	Though the exterior of the Ryemarket Shopping Centre is visually dated due to the 1970s precinct style, the majority of the buildings along the High Street appear to have been built in the late 19th and early 20th Century and have maintained their historic character. The public realm of High Street, Crown Square and Ryemarket Square is of a moderate to high quality, incorporating well maintained plants and some street furniture at the centre's core. However, there could be potentially a greater provision of street furniture. The shop frontages throughout the town are in an overall good condition, though some do appear dated and in need of refurbishment. This observation is also acknowledged in the Area Action Plan, which highlights the improvements to the public realm as a key objective. In terms of character, the local area is defined by a mixture of early to mid-19th and 20th and Century houses that have been converted to commercial units on High Street, Lower High Street and Market Street. The majority of the Town Centre is located within the Stourbridge Town Centre Conservation area. There are a number of listed buildings within the Town Centre Boundary: • Grade II Listed Barclays Bank on High Street • Grade II Listed 40 New Road • Grade II Listed 67-75 Lower High Street • Grade II Listed 65 High Street • Grade II Listed St Thomas' Vicarage on Market Street • Grade I Listed Parish Church of St Thomas on Market Street • Grade II Listed Town Hall on Market Street • Grade II Listed Talbot Hotel on High Street • Grade II Listed 4 and 6 Market Street • Grade II Listed Clock Tower on Lower High Street • Grade II Listed The Olde Corner Shoppe on Lower high Street • Grade II Listed 160 Lower High street • Grade II Listed 170, 170A and 170B Lower High Street • Grade II Listed Presbyterian Chapel on Lower High Street • Grade II Listed 176 Lower High Street • Grade II Listed 177 Lower High Street • Grade II Listed 7 Lower High Street • Grade II Listed Stourhurst House on Lower High Street. The Area Action Plan seeks to ensure that the historic character and local distinctiveness of Stourbridge Town Centre is preserved and enhanced. The heritage assets contribute to historic character of Stourbridge and Stourbridge town centre. The environmental quality in Stourbridge appears to have retained a similar standard to that reported in the 2013 Area Action Plan.
CUSTOMER'S EXPEREINCE AND BEHAVIOUR	The household telephone interview survey (HTIS) asked specific questions on respondents' views and perceptions of their local city or town centre. For those whose centre was Stourbridge Town Centre, the overwhelming majority of the respondents visited either one day a week (32.3%); every 2-3 days (16.7%); every two weeks (15.5%) and some 11.6 % frequented monthly. Only 5.9% of those who responded never visited the centre. Additionally of the sample that frequented the centre some 71% used the centre for household shopping and town centre uses. In terms of what people 'like' about Stourbridge Town Centre , the most frequently raised themed are raised below:

Lambert Smith Hampton

Table 1: Stourbridge Town Centre: Top 'Likes'

Response	%
Close to home	39.1%
Attractive environment / nice place	8.3%
Easy to get to by car	7.9%
Good range of non-food shops	7.1%
Traditional / historical	6.1%
Compact	4.0%

Source: HTIS 2019

As the table shows the majority of respondents (who frequented the centre) considered that there was very little that they liked about the town centre. Notwithstanding this, proximity to home, the attractiveness of the environment, accessibility by car and the range of non-food shops represent a draw to those that use the centre.

Respondents were also asked what, if anything, they would improve in Stourbridge Town Centre that might encourage them to visit more. The most frequent suggestions were as follows:

Table 2: Dudley Town Centre: Key Improvements

Response	%
Cleaner streets	5.3%
Free car parking	17.1%
More / better comparison retailers (i.e. non-food shops)	9.2%
More / better places for eating out (e.g. cafes and restaurants)	5.6%
More / better parking	19.6%
More national multiple shops / High Street shops	22.2%
More independent shops	20.1%
Less charity shops	5.5%
Better access by road	4.3%

Source: HTIS 2019

As the table shows a high proportion of respondents suggest enhancing the retail offer (more multiple and independent shops) as well as free/ more car parking.

Of those whose nearest centre was Stourbridge Town Centre but who never visited the centre the top reasons cited broadly mirrored the improvements i.e. enhancing the retail offer as well as parking and quality of the environment. Additionally, traffic congestion and accessibility by car are raised as an issue.

Table 3: Stourbridge Town Centre: Top Reasons for Not Visiting

Response	%
Poor range of shops	19.2%
Poor parking provision	18.8%
Poor quality shops	14.7%
Poor range of 'high street' retailers/ multiples	10.4%
Poor range of non-food shops	10.1%
Poor facilities in general	9.0%
Not easy to get to by car	8.1%
Traffic congestion	7.9%
Poor range of food stores	7.3%
Feels unsafe	6.5%
Poor range of independent shops	6.1%

	Other places are easier to get to — 4.6% Poor facilities in general — 4.3% Source: HTIS 2019
CONCLUSION	Stourbridge's vacancy levels are below the national average and the town has a fairly good mix of retail and leisure uses. Whilst there is an under-representation of leisure services (20% compared to 24%) , when comparing the levels of floorspace leisure services make up a reasonable percentage of Stourbridge's floorspace at 27% which is higher than the 25% national average. In addition to a range of main town centre uses there are a reasonable number of community facilities that support the town centre which help to contribute to the overall function and performance of the area. The shopping centre appears dated and would benefit from a redevelopment/refurbishment of the physical structures to modernise the 70's style. The significant level of free parking and large number of bus services and access to national rail service means that Stourbridge is highly accessible with all modes of transport. Stourbridge is performing relatively well in relation to its size, and provides vital services for local residents and visitors and is a vital and viable town centre.
KEY ISSUES/SWOT	• **Strengths** ○ Good range of uses, good national multiple representation, maintaining size of retail core well; ○ Highly accessible, especially by bus; ○ Strong Convenience provision in Tesco, Aldi and Waitrose; ○ Strong Retail Service sector; ○ Good Public realm; ○ Well maintained plants and street furniture in Ryemarket Square and Crown Square; ○ Lower than average vacancy rate; ○ Free car parking in town centre; ○ A number of heritage assets in close proximity to the centre, providing character opportunities. • **Weaknesses** ○ Dated shopping centre and a number of dated shopping units; ○ Some poor pedestrian areas characterised by narrow pavements in secondary locations. • **Opportunities** ○ Encourage more family orientated evening activity uses to enhance the evening economy; ○ Improve the façade of the Shopping Centre and dated units; ○ Provide additional street furniture and planting; ○ Creation/repurposing of existing street fronts/vacant units. • **Threats** ○ Any future reduction in Comparison Goods retail could negatively impact the vitality and viability of the centre, particularly given the centre's proximity to the large Merry Hill shopping centre. ○ Competition from neighbouring centres. ○ Lack of investment in the centre.

RECOMMENDED DESIGNATION	Stourbridge is identified as a town centre, which accurately reflects its role in the hierarchy of centres, and this should be maintained. The following could be explored through a tier-two plan review: **Centre Boundary** The existing boundary is defined by Bath Road, High Street and St John's Road to the north, St John's Road, A458, Foster Street East and Vauxhall Road to the east, New Road to the South and Bath Road to the West. As such, no amendments to the town centre boundary are proposed. **Primary shopping area** The Primary Frontage and Primary Shopping Area designations are identified in the 2013 Area Action Plan. The designations capture the present day retail areas and therefore no amendment to the designation is proposed.

SUMMARY OF APPRAISAL

Background to the Stourbridge Town Centre Health Check Appraisal

Stourbridge is a small market town forming part of the Black Country and Greater Birmingham Region. The town has undergone significant change due to the investment into a number of regeneration programmes in the town. The regeneration programme included the redevelopment of the Crown Centre and Town Square.

Sub-regional Shopping hierarchy

Designation as town centre is correct and reflects its broad role in the hierarchy of centres.

Diversity of main town centre uses

The diversity of uses analysis indicates above average representation across the majority categories of goods and services except for leisure services where the provision is marginally lower (20% v 24%).

Retailer Representation

The retailer representation across the centre is characterised by a good mixture of multiple retailers and independent retailers. It is important to maintain the current level of multiple retailers to retain the attraction and vitality of the centre.

Proportion of vacant street level property

The Goad data indicates an approximate 9% vacancy rate, which is just below the national average. The Council's latest monitoring data (March 2019) indicates a vacancy rate of 8 on the primary frontage.

Customer's views and behaviour

Respondents indicated the main improvements include enhancing the retail offer as well as free parking.

Pedestrian Flows

Good pedestrian footfall was observed on the main shopping streets, with lower footfall observed in the surrounding areas.

Accessibility

The town centre is highly accessible by all modes of transport. The centre is especially accessible via bus and rail due to the centre's proximity to the Stourbridge interchange.

Perception of safety and occurrence of crime

High Street, Lower High Street and Market Street are covered by CCTV. The remainder of the Town Centre benefits from natural surveillance during the day.

Commercial rents on non-domestic property

N/A

State of the environmental quality

In broad terms the environmental quality of the town centre is good. The public realm on Crown Square/ Ryemarket Square includes well maintained planting and street furniture.

Digital facilities in Stourbridge Town Centre

There is currently no provision of any central digital facilities such as Wi-Fi infrastructure within the town centre.

Strengths of Stourbridge Town Centre

- Good mix of national multiples and independent retailers
- Well maintained plants and street furniture in the centre
- The town centre is highly accessible with a high level of connectivity to the local bus network
- Lower than average vacancy rates
- A number of heritage assets in close proximity to the centre, providing character opportunities.

Appendix 10: LPA: Dudley: Centre - Halesowen

HALESOWEN TOWN CENTRE

ADDRESS (and Zone)	**Halesowen Town Centre**[1]
DESCRIPTION	The Town centre is focused on the dated Cornbow Shopping Centre, with other key areas being High Street, Hagley Street and Peckingham Street. The town centre is almost contained within the bounds of Queensway (north, south and west), Rumbow (north east) and Centre Lane (south east). The primary retail[2] area is located within the bounds of Queensway (north, south and west), Birmingham Street (north east) and Pool Road (south east).
CURRENT STATUS	Town Centre

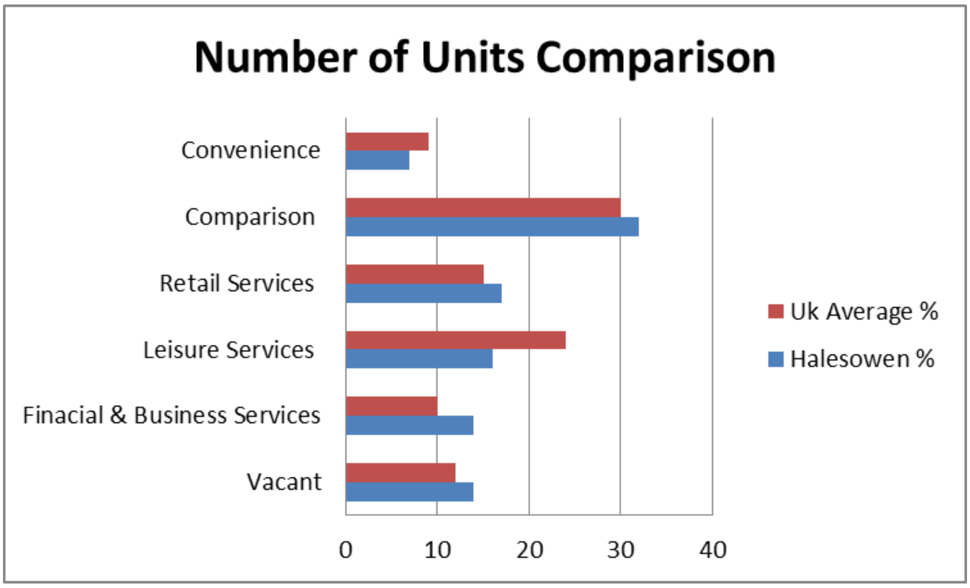
DIVERSITY OF USES	No.	Floor Space (sq.m)
Convenience	12	10,154
Comparison	52	9,504
Retail Service	27	1,905
Leisure Service	26	3,642
Financial & Business Services	23	3,066
Vacant	22	3,345
Total No. Of Uses	**162**	**31,615**

COMMUNITY FACILITIES	TOTAL: 8
• Halesowen Library • St John the Baptist Church • Post Office • Halesowen Sports Club • Halesowen Leisure Centre • Lifecentral Church • Cornbow Hall • Halesowen C of E Primary School	

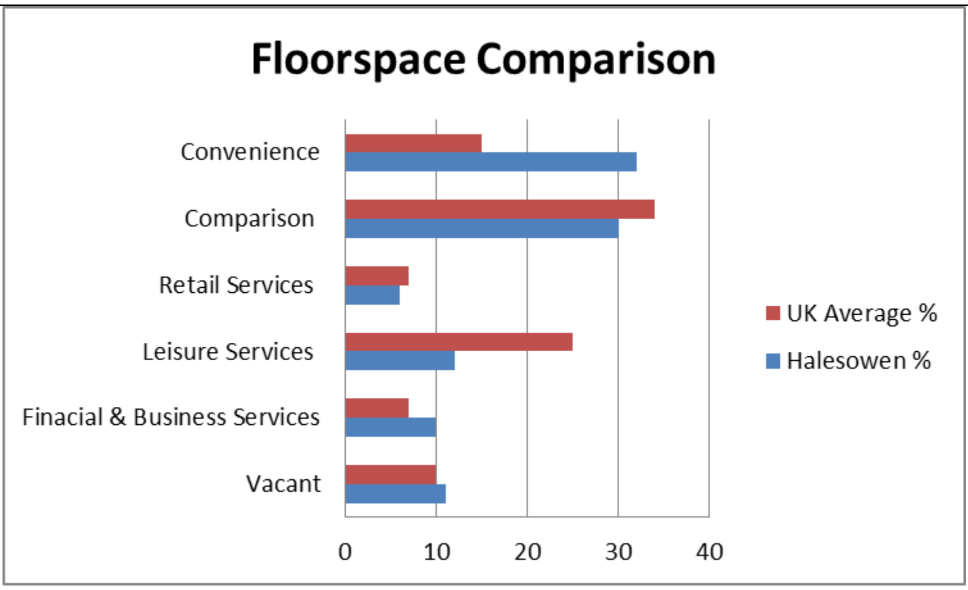
NATIONAL MULTIPLES	TOTAL: 35
• Boots • W H Smith • Wilkinson • New Look • Clarks • EE • Iceland • ASDA • Bonmarche • Card Factory • Costa Coffee • Greggs • Holland & Barrett • Ladbrokes • Peacocks • Poundland • Savers • Shoe Zone • The Co-Operative Bank • The Fragrance Shop • The Works • Thorntons • Yorkshire Building Society • HSBC • Santander	

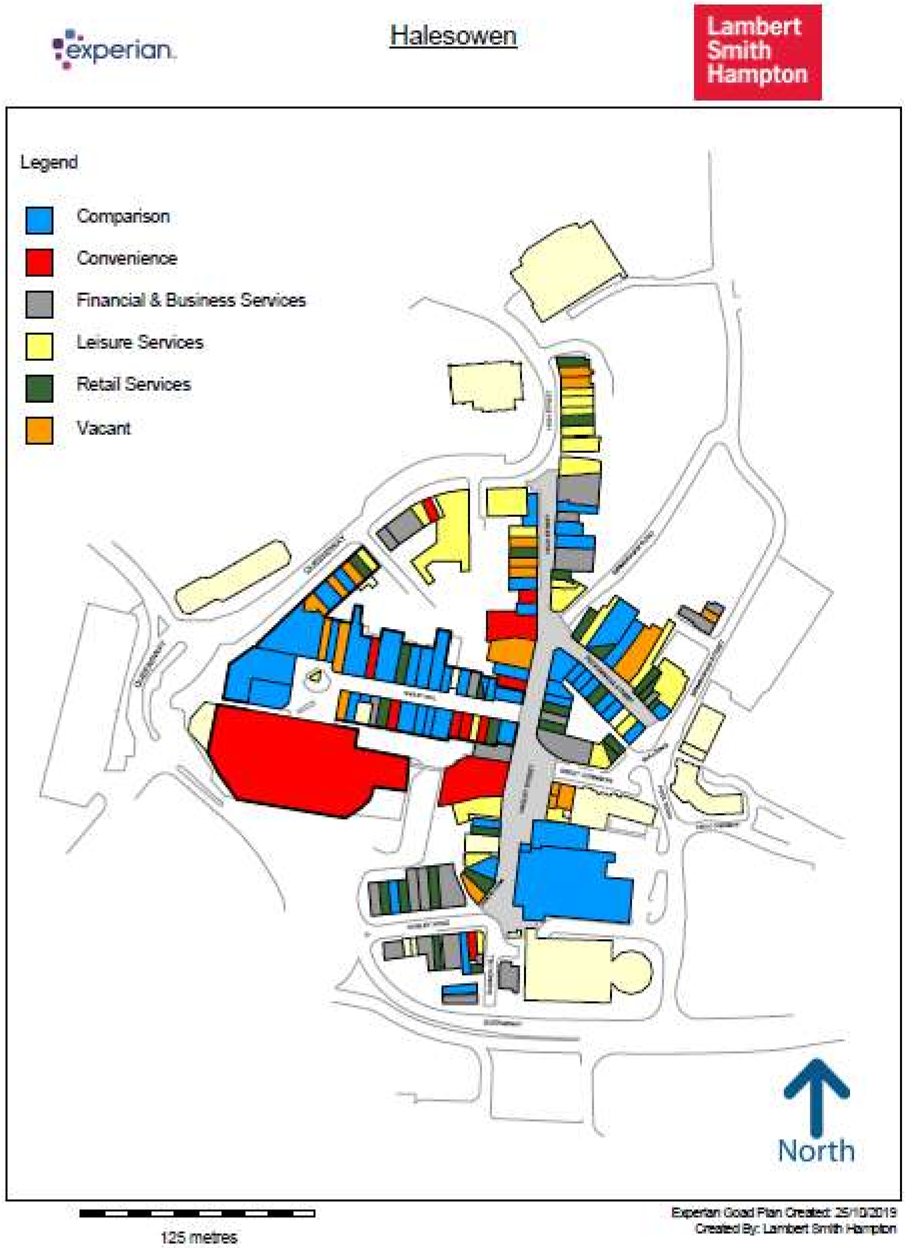
[1] As defined in Halesowen Area Action Plan (2013)
[2] As defined in Halesowen Area Action Plan (2013)

			• Lloyds Pharmacy • The Salvation Army Charity Shop • Shelter Charity Shop • British Heart Foundation • Bright House • Subway • TSB • Cancer Research UK • Halifax	

USES	The town centre has 162 commercial units that provide a range of main town centre uses[3]. In comparison to the national average[4] there is an under-representation of convenience goods units (30% compared to 34%) and an under-representation of Leisure Services (12% compared to 25%). When comparing the levels of floorspace it can be seen that although there may be fewer number of convenience goods stores they make up a sizeable percentage of Halesowen's floorspace at 32% which is significantly higher than the 15% national average. This is attributed to the large floorplates of ASDA and Iceland. This difference in number of units and floorspace reverses with Retail Services being marginally over-represented in terms of number of unit (17% Halesowen v/s 15% National), yet under- represented in terms of floorspace (6% Halesowen v/s 7% National). 

[3] As defined in National Planning Policy Framework, Annex 2 – Page 68
[4] GOAD, all centres, 2018


Floorspace Comparison
Convenience
Comparison
Retail Services
Leisure Services
Finacial & Business Services
Vacant
0
10
20
30
40
UK Average %
Halesowen %



The centre has a good range of national multiples (multiples), with ASDA providing a main anchor use, though other large retailers such as Iceland contribute a large amount of floorspace. The multiples are distributed throughout the centre, with a mixture of charity shops and high street banks making up the majority of multiples outside of the shopping centre. The multiples within the shopping centre are focussed on Fashion Stores, Stationery Goods with some Convenience Goods. Halesowen is in the strong position of having five of the main national banks with Halifax, TSB, HSBC and the located on high Street and Co-operative Bank and Santander located on Hagley Street.

The vacancy rate is just above the national average at 14% compared with 12%.

Of the 61 commercial units contained within the shopping centre (not including ASDA) 7 are vacant. 13% vacancy rate in the shopping centre aligns with the vacancy rates for wider Halesowen.

Halesowen's night time economy comprises Picks Public House on High Street, The William Shenstone Public House and Jimmy Mack restaurant on Queensway, the Grill on Great Cornbow Street, 250 Grill House on Plaza Mall, and Figaro on Peckingham Street. This appears as an undersupply of night time uses given the size of the town, a further reduction in evening activity generating uses should be avoided. In broad terms there is an under representation in family

	orientated evening provision.
PEDESTRIAN FLOWS	Observations of pedestrian flows found that there were a reasonable number of pedestrians on Hagley Street, High Street and within the Shopping Centre. Traffic levels on the surrounding levels were low but most of the on-street parking spaces were occupied.
ACCESSIBILITY	The Shopping Centre and the various streets leading to and from it benefit from pedestrianisation. High Street and Hagley Street are fully pedestrianised, with wide pathways. High Street is accessible via a ramp of Queensway and Hagley Street is accessible via a dropped kerb of Hagley Road. To the immediate north and south respectively, the centre is bounded by New Road and Queensway ring road. Beyond the ring road, there is a substantial catchment area, characterised by low density residential homes. The east and west of the site also offer substantial catchment areas and are dominated by low density residential properties. The residents of Hasbury (to the west), Belle Vale (to the north west) and Lapal (to the east) also fall within the catchment of Halesowen Town Centre. A large number of bus services pass through Halesowen. Halesowen's central bus station is located on Queensway adjacent to the Cornbow Centre. Bus services are available to Walsall, Merry Hill Shopping Centre and Birmingham City Centre; this helps to supplement the lack of a train station in the town. The following make up the centre's parking provision: • c.140 spaces High Street Multi Storey– 2 hours free • c.114 spaces Andrew Road – 2 hours free • c.600 spaces Cornbow Shopping Centre – Pay and display (Spend over £5.00 in ASDA and parking is refunded) • c.150 spaces Pool Road Car Park – 2 hours free • c.100 spaces Birmingham Street- 2 hours free On street parking is generally only available on Queensway which features a mix of disabled and regular parking bays adjacent to St john the Baptist Church; these bays are restricted to 1 hours parking between 7am-7pm Considering the size of Halesowen there is a substantial amount of parking available, much of which is free. The integration of the ASDA and Cornbow Shopping centre parking encourages those who have visited the supermarket for a weekly shop to remain in the town centre for longer periods of time as the cost of the parking can be refunded.
PERCEPTION OF SAFETY	The centre appears safe, with most areas active and benefiting from natural surveillance, and active pedestrian routes generally overlooked. High Street, Hagley Street and the shopping centre have the added benefit of CCTV cameras positioned at various points. With only one Public House being located along High Street and the reminder of the restaurants being located outside of the High Street/Hagley Street central area, it can be assumed that there would be little to no evening activity taking place in the central thoroughfare. In the evening this lack of natural surveillance and separation from passing traffic could potentially lead to anti-social behaviour. However, this is likely to be dissuaded by the CCTV cameras.
ENVIRONMENTAL QUALITY	Though the exterior of the Shopping Centre and many of the buildings along High Street/Hagley Street are visually dated due to their 1960s precinct style, the public realm of High Street/Hagley Street is of a moderate to high quality, incorporating well maintained plants and street furniture at the centre's core. The shop frontages throughout the town are in an overall good condition, though some do appear dated. This observation is also acknowledged in the Area Action Plan, which highlights that the 'the quality of some buildings and spaces are dated' and 'in need of repair to help raise the overall quality of the town'.

	In terms of character, the local area is defined by a mixture of 60s and 70s style precinct commercial buildings. There are a number of early to mid-19th and 20th Century houses that have been converted to commercial units at the northern end of High Street and the eastern end of Peckingham Street. The general condition of the pavement in the pedestrianised area appears to be good. There are a number of listed buildings within the Town Centre Boundary including the Grade II listed Council Offices on Great Cornbow, neighbouring 24 Great Cornbow, 31 High Street (Occupied by The English Rose Tea Room and Options Barber Shop) and the Grade 1 Church of St John the Baptist, to the north of Queensway. The Area Action Plan seeks to ensure that Halesowen heritage assets are retained and can become the focus of new and improved public realm. The environmental quality in Halesowen appears to have retained a similar standard to that reported in the 2013 Area Action Plan.
CUSTOMER'S EXPERIENCE AND BEHAVIOUR	The household telephone interview survey (HTIS) asked specific questions on respondents' views and perceptions of their local city or town centre. For those whose centre was Halesowen Town Centre, the overwhelming majority of the respondents visited either one day a week (28.1%); every 2-3 days (18.1%); every two weeks (11%) and monthly (8.7%). Some 5.2% frequented 4-6 times a week; 3.3% daily and 9% of those who responded never visited the centre. Additionally of the sample that frequented the centre some 62% used the centre for household shopping and town centre uses. In terms of what people 'like' about Halesowen Town Centre, the most frequently raised themed are raised below:

Table 1: Halesowen Town Centre: Top 'Likes'

Response	%
Close to home	39.5%
(Nothing / very little)	23.7%
Easy to park	11.3%
Attractive environment / nice place	9.4%
Good range of non-food shops	6.4%
Easy to get to by bus	5.6%
Quiet / not too busy	5.5%
Good facilities in general	5.3%
Traditional / historical	5.1%
Affordable shops	5.0%
Close to work	4.1%

Source: HTIS 2019

As the table shows the majority of respondents (who frequented the centre) considered that there was very little that they liked about the town centre. Notwithstanding this, proximity to home, the ease of parking and the attractiveness of the environment represent a draw to those that use the centre.

Respondents were also asked what, if anything, they would improve in Halesowen Town Centre that might encourage them to visit more. The most frequent suggestions were as follows:

Table 2: Halesowen Town Centre: Key Improvements

Response	%
More national multiple shops / High Street shops	32.5%
More independent shops	28.7%
(Nothing)	27.4%
Free car parking	12.2%
More / better comparison retailers (i.e. non-food shops)	10.2%
More / better parking	7.3%
More / better food shops	6.4%
More / better places for eating out (e.g. cafes and restaurants)	6.3%
More / better entertainment	5.8%

Source: HTIS 2019

As the table shows a high proportion of respondents suggest enhancing the retail offer (more multiple and independent shops). Free and better car parking was also a suggested improvement.

Of those whose nearest centre was Halesowen Town Centre but who never visited the centre the top reasons cited broadly mirrored the improvements i.e. enhancing the retail offer as well as parking.

Table 3: Halesowen Town Centre: Top Reasons for Not Visiting

Response	%
Poor range of shops	28.5%
Poor parking provision	13.9%
Poor quality shops	12.6%
Poor range of food stores	10.6%
Poor range of non-food shops	8.2%
Poor range of independent shops	8.0%
Too far away	5.3%
Just prefer to use other places	4.9%
Don't like town centres	4.6%
No reason to go there	4.4%

Source: HTIS 2019

CONCLUSION

Halesowen' vacancy levels are just above the national average and the town has a fairly good mix of all retail and leisure uses. The above national average vacancy rates could be linked to the town's proximity to Merry Hill Shopping Centre, which attracts the big national brands.

Whilst there are only 7 Convenience Goods units within the centre, the floorspace of these make up a sizeable percentage of Halesowen's retail profile at just over 2 times the national average (32% compared to 15%).

In addition to a range of main town centre uses there are a reasonable number of community facilities that support the town centre which help to contribute to the overall function and performance of the area.

The shopping centre is dated and would benefit from a redevelopment/refurbishment of the physical structure to modernise its 60's style.

The significant level of free parking and large number of bus services make Halesowen highly accessible with all modes of transport.

Halesowen is performing relatively well in relation to its size, and provides vital services for local

Lambert Smith Hampton

	residents and visitors and has strong signs of vitality and viability.
KEY ISSUES/SWOT	• **Strengths** ◦ Good range of uses, good national multiple representation, maintaining size of retail core; ◦ Highly accessible, especially by bus; ◦ Strong Convenience anchor in ASDA; ◦ Strong Retail Service sector; ◦ Well maintained plants and street furniture in High Street/Hagley Street. ◦ A number of heritage assets in close proximity to the centre, providing character opportunities. • **Weaknesses** ◦ Dated shopping centre and 1960s/70s shopping units; ◦ Some poor pedestrian areas in secondary locations. • **Opportunities** ◦ Encourage more family orientated evening activity uses to enhance the evening economy; ◦ Improve the façade of the Shopping Centre and dated units. ◦ Creation/repurposing of existing street fronts/vacant units. • **Threats** ◦ Reduction in Comparison Goods retail could negatively impact the vitality and viability of the centre, particularly given the centre's proximity to the large Merry Hill shopping centre. ◦ Competition from neighbouring centres. ◦ Lack of investment in the centre.
RECOMMENDED DESIGNATION	Halesowen is identified as a town centre, which accurately reflects its role in the hierarchy of centres, and this should be maintained. The following could be explored through a tier-two plan review: **Centre Boundary** The existing boundary is defined by Queensway, Rumbow and Centre Lane roads that encircle the town centre and provide a definitive physical barrier to the centre's boundaries. As such, no amendments to the town centre boundary are proposed. **Primary shopping area** The Primary Frontage and Primary Shopping Area designations are identified in the 2013 Area Action Plan. The designations capture the present day retail areas and therefore no amendment to the designation is proposed.

SUMMARY OF APPRAISAL

Background to the Halesowen Town Centre Health Check Appraisal

Halesowen is a large market town forming part of the Black Country and Greater Birmingham Region. The town has undergone significant change due to the investment into a regeneration programme for the town. The regeneration programme included the redevelopment of the Cornbow Shopping Centre, the expansion of the Bus Station and improvements to the road network.

Sub-regional Shopping hierarchy

Designation as town centre is correct and reflects its broad role in the hierarchy of centres.

Diversity of main town centre uses

The diversity of uses analysis indicates below average representation across the majority categories of goods and services except for retail and comparison services where the provision is marginally higher (17% vs 15 % and 32% vs 30% respectively)

Retailer Representation

The retailer representation across the centre is characterised by a good mixture of multiple retailers and independent retailers. It is important to maintain the current level of multiple retailers to retain the attraction and vitality of the centre.

Proportion of vacant street level property

The Goad data indicates an approximate 14% vacancy rate, which is just above the national average. The Council's latest monitoring data (March 2019) indicates An approximate vacancy rate of 17%, just above the national average.

Customer's views and behaviour

Respondents indicated the main improvements include enhancing the retail offer as well as parking.

Pedestrian Flows

Good pedestrian footfall was observed on the main shopping streets, with lower footfall observed in the surrounding areas.

Accessibility

The town centre is high accessible by all modes of transport except rail and tram. The Cornbow Centre is especially accessible via bus as it is located adjacent to the bus station.

Perception of safety and occurrence of crime

High Street and Hagley Street are covered by CCTV. The remainder of the Town Centre benefits from natural surveillance during the day.

Commercial rents on non-domestic property

N/A

State of the environmental quality

In broad terms the environmental quality of the town centre is good. The public realm on High Street/Hagley Street includes well maintained planting and street furniture.

Digital facilities in Halesowen Town Centre

There is currently no provision of any central digital facilities such as Wi-Fi infrastructure within the town centre.

Strengths of Halesowen Town Centre

- Good mix of national multiples and independent retailers
- Well maintained plants and street furniture in the centre
- The town centre is highly accessible with a good level of connectivity to the local bus network
- A number of heritage assets in close proximity to the centre, providing character opportunities.

Lambert Smith Hampton

Appendix 11: LPA: Sandwell: Centre - Blackheath

BLACKHEATH TOWN CENTRE

ADDRESS (and Zone)	Blackheath Town Centre
DESCRIPTION	The Town Centre is focused around the Market Place roundabout, distributed across the various linked streets including High Street, Halesowen Street, Long Lane, and Oldbury Road.
CURRENT STATUS	Town Centre

PHOTOGRAPHS:


Halesowen Street (view north)


Market Place (view east)

DIVERSITY OF USES	**No.**	**Floor Space (sq.m)**
Convenience	16	10,730
Comparison	40	6,790
Retail Service	37	2,980
Leisure Service	36	4,720
Financial & Business Services	9	1,880
Vacant	20	3,330
Total No. Of Uses	**158**	**30,430**

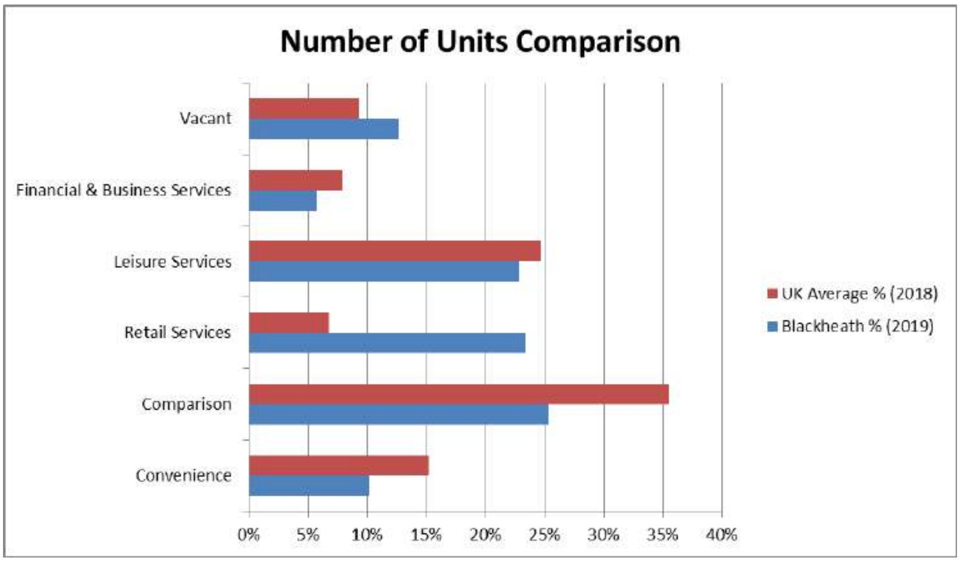
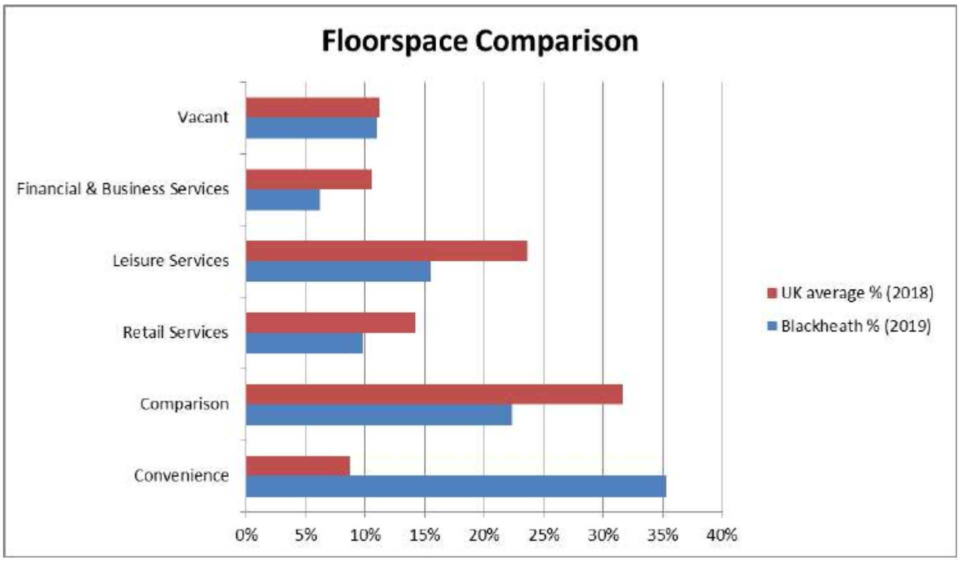
COMMUNITY FACILITIES — **TOTAL: 7**

- Blackheath Library
- Your Health Partnership - Regis Medical Centre
- Kingdom Central Birmingham (church)
- Central Methodist Church
- Heath Street Independent Methodist Church
- St Paul's Church
- St Paul's Church Hall

NATIONAL MULTIPLES — **TOTAL: 17**

- Wilko
- Lloyds Bank
- Card Factory
- Greggs
- Barclays Bank
- Iceland
- Lidl
- Specsavers
- William Hill
- Betfred
- Coral

			• Boots • Sainsbury`s • Argos • Poundland • Lloydspharmacy • Pizza Hut	

USES	The Town Centre has 158 commercial units, remaining the same as the 2009 total. There is approximately a 5% and 10% under-representation of both Comparison and Convenience Goods store numbers (respectively) when compared to the UK national average[1]. Conversely, in relation to floorspace Convenience Goods are over-represented making up 35% of Blackheath's commercial floorspace compared to the national average of 9%. 81% of this Convenience goods floorspace is taken up by Sainsbury's, Lidl, and Blackheath Market. Floorspace figures show that every use other than Convenience is to some degree under-represented in Blackheath. However, in terms of number of units, Retail Services are significantly higher than the UK average at 23% compared to 7%.   The centre has a moderate range of 17 national multiples (multiples), with Sainsbury's providing the main anchor and Lidl a secondary anchor. These multiples are generally distributed throughout the

[1] GOAD, all centres, 2018

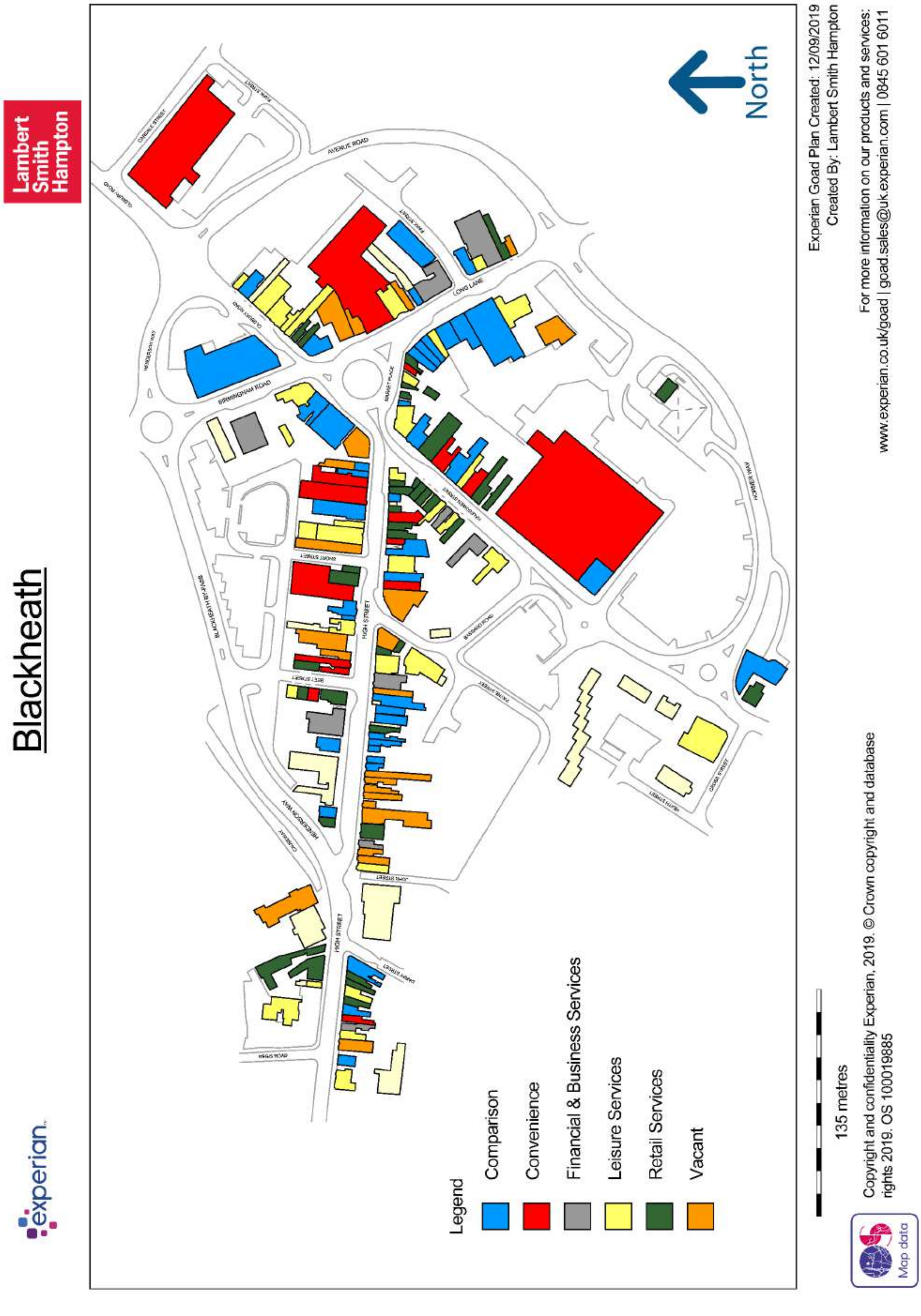
	centre with no clear clustering. Though Lidl makes up almost 20% of the centre's convenience floorspace it technically falls outside the Town Centre boundary[2] physically separate from the rest of the centre by the A4100 with a lack of continuous commercial uses. Sainsbury's contrasts this by having a pedestrian link to the Town Centre that features continuous commercial uses (Halesowen Street) As seen from the land use map at the end of this section, the uses are mixed throughout the centre. There is a massing of Retail Services along Halesowen Street and the eastern end of High Street. Vacant commercial units are generally distributed throughout the centre, though a number of these have become focused between 31-36 High Street. The number of vacant commercial units has slightly increased between 2009 and 2019, from 18 to 20, with the floorspace of these increasing from 1,951 to 3,330 sq.m. There has been very little change in the number of commercial units and the floorspace of these between 2009 and 2019. In 2009 there were 158 commercial units with a total floorspace of 30,556 sq.m; in 2019 there are 158 units with a total floorspace of 30,430 sq.m. At a finer level there has been little to no variation in the number of individual uses or floorspace, with the centre displaying very little evidence of change in terms of uses over a 10 year period.
PEDESTRIAN FLOWS	The centre was visited on a mid-week afternoon and whilst busy with vehicular traffic, was less so with pedestrians. Pavements were generally quiet with only one or two pedestrians passing every few hundred metres. The busiest part of the centre was Sainsbury's with the car park appearing almost two thirds full. Other than Sainsbury's, the preponderance of pedestrians were seen towards the Market Place ends of the various streets that join to the roundabout, with most waiting to cross the streets at various points.
ACCESSIBILITY	Blackheath as a centre predominantly comprises four main streets connected to the central Market Place roundabout, circled by the A4099 (Archer Way). There is a clear prioritisation of vehicles and traffic flow over pedestrians and pedestrianisation. Despite this, the one way system on High Street, Oldbury Road, and Halesowen Street likely helps to ease traffic congestion and aids with pedestrian accessibility. Barriers at the north west and south west junctions of Market Place prevent pedestrians crossing directly on the street corners. Though this appears against the grain of desired walking patterns, the clear impact points on some of these barriers highlights their necessity for pedestrian safety. The accessibility and quality of the pedestrian environment varies throughout Blackheath. There are no defined pedestrian crossing points along High Street, though a number of dropped kerb points are present. A Zebra crossing is available on Oldbury Road with pelican crossings present on both Long Lane and Halesowen Street. There are multiple traffic islands around the junctions of Market Place though it is unclear which of these (if any) are intended to be used as pedestrian crossing points. The following make up the centre's parking provision: • c.300 spaces Sainsbury's – 2 hours free/max stay • c.140 spaces Short Street – pay & display • c.100 spaces Lidl – free • c.85 spaces Park Street/Park Street West – pay & display • Various others and on street parking On street parking is available on a number of streets in the centre; of the main roads 2 hours free parking is available on Halesowen Street & High Street, 30 minutes on Oldbury Road, and no street parking on Long Lane or Birmingham Road. There are four bus stops in the centre which provide services to and from a number of destinations including: Halesowen, Cradley Heath, Quinton, Oldbury, West Bromwich, and Dudley.

[2] Sandwell Site Allocations and Delivery – 2012

PERCEPTION OF SAFETY	The centre appears safe, with most main pedestrian routes overlooked by commercial units during the daytime. Blackheath's evening activity is provided by seven pubs and three restaurants which are sufficiently distributed to provide a limited level of natural surveillance to the main streets. Only a few CCTV cameras were noticed around the centre the presence of which appears mostly for traffic related purposes.
ENVIRONMENTAL QUALITY	Blackheath's general environment is neither very good, nor poor, rather it falls somewhere between, appearing quite dated and tired in places but generally acceptable. The tired appearance is most noticeable with the frontages of a large amount of the independent commercial units, with the national multiples generally being in much better condition.  High Street (view east)  Halesowen Street (view north east) The area is characterised by a large array of terrace buildings varying in style and period. It is noted that there are no listed buildings or conservation areas within the centre; however, the area from and including Market Place to the junction of High Street and the A4100 falls within the 'Area of Townscape Value' zone as per SAD HE 6. The former Istanbul Restaurant (originally a bank) to the south east corner of Market Place presents a more distinct style that stands out on this corner. There is a lack of street furniture throughout the centre including the likes of benches and planting. Though this could be attributed to a lack of space, where there is sufficient space there is still a lack of attractive furniture or landscaping. As stated, there are various metal barriers present around Market Place which separate pedestrians from traffic movement. These barriers vary in their condition but are generally poorly maintained being both rusty and damaged (be it through traffic collisions or other means). The quality of paving varies throughout the centre, with higher quality paving found on high street and the northern side of Long Lane, contrasted by piecemeal tarmac elsewhere. The inconsistency of paving throughout the centre adds to a disjointed landscape and pedestrian experience.
CONCLUSION	Blackheath appears to have remained largely unchanged since it was last assessed in 2009, retaining the same number of commercial units, and a similar level of floorspace. The distribution of these uses has also seen only slight variation, suggesting that whilst individual commercial units may have changed, the general pattern and make-up of uses has not materially changed. Physically, many of the commercial units in Blackheath are in need of refurbishment, and the centre would benefit from some investment in street furniture and the general public realm. The centre does experience large amounts of traffic, the one-way system helps to aid pedestrian flows, though this flow is hindered by incoherent paving and a lack of crossing points. Blackheath provides a reasonable range of retail goods and services, with some community facilities. The centre's commercial offering has neither expanded nor contracted over a 10 year period and

	remains a vital and viable Town Centre.
KEY ISSUES/SWOT	• **Strengths** ○ Good bus service links; ○ Good range of uses, good national multiple representation. • **Weaknesses** ○ Tired frontages of some commercial units; ○ Lack of continuity in paving and landscaping. • **Opportunities** ○ Improve store frontages; ○ Consider improving street furniture such as benches and planting schemes. • **Threats** ○ Further decline in environmental quality could deter visitors.
RECOMMENDED DESIGNATION	Blackheath is identified as a Town Centre, which accurately reflects its role in the hierarchy of centres, and this should be maintained. The following could be explored through a tier-two plan review: **Town Centre Boundary** The encirclement of all but the east of the Town Centre by the A4099 provides a definitive physical barrier to the centre's boundaries. Lidl makes up almost 20% of the centre's convenience floorspace, and although there is currently poor commercial continuity across the A4099 it is recommended that Lidl be included within the Town Centre boundary as part of the Sandwell Plan making process. **Primary Shopping Area** No Primary Shopping Area (PSA) has been identified in current or extant policies; nevertheless, the current Town Centre boundary acts as an appropriate PSA.

Lambert Smith Hampton



Lambert Smith Hampton

Appendix 12: LPA: Sandwell: Centre – Cradley Heath

Lambert Smith Hampton

CRADLEY HEATH TOWN CENTRE

ADDRESS (and Zone)	Cradley Heath Town Centre
DESCRIPTION	Cradley Heath is a linear Town Centre, spanning the length of High Street, including sections of Cradley Road and Graingers Lane.
CURRENT STATUS	Town Centre

PHOTOGRAPHS:

High Street (view south west)

High Street (view north east)

DIVERSITY OF USES	No.	Floor Space (sq.m)
Convenience	20	11,320
Comparison	30	3,860
Retail Service	25	1,650
Leisure Service	26	2,790
Financial & Business Services	6	1,340
Vacant	20	3,780
Total No. Of Uses	**127**	**24,740**

COMMUNITY FACILITIES	TOTAL: 3
• Cradley Road Medical Practice • Cradley Heath Baptist Church • St Lukes Baptist Church	

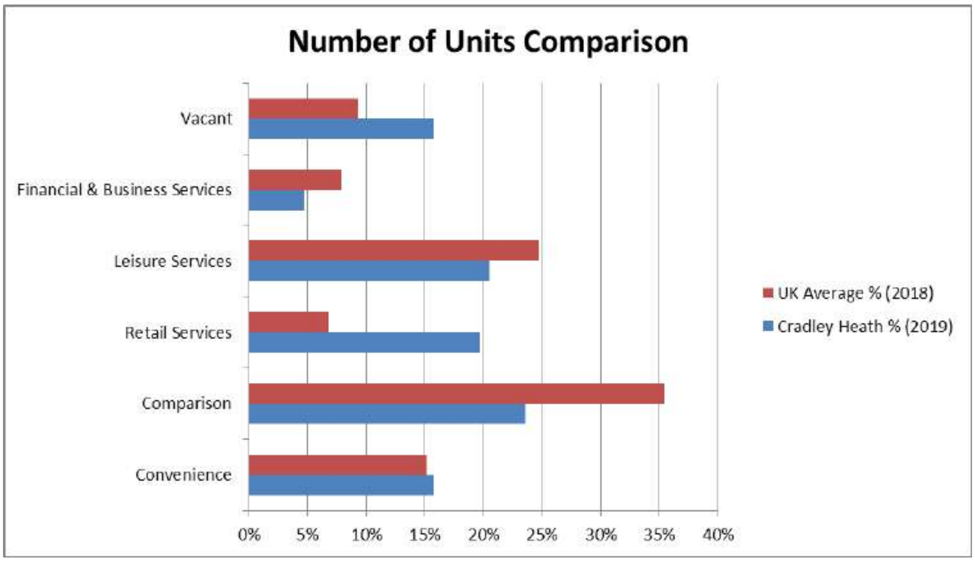
NATIONAL MULTIPLES	TOTAL: 4
• Tesco • Lidl • Lloyds Bank • Iceland	

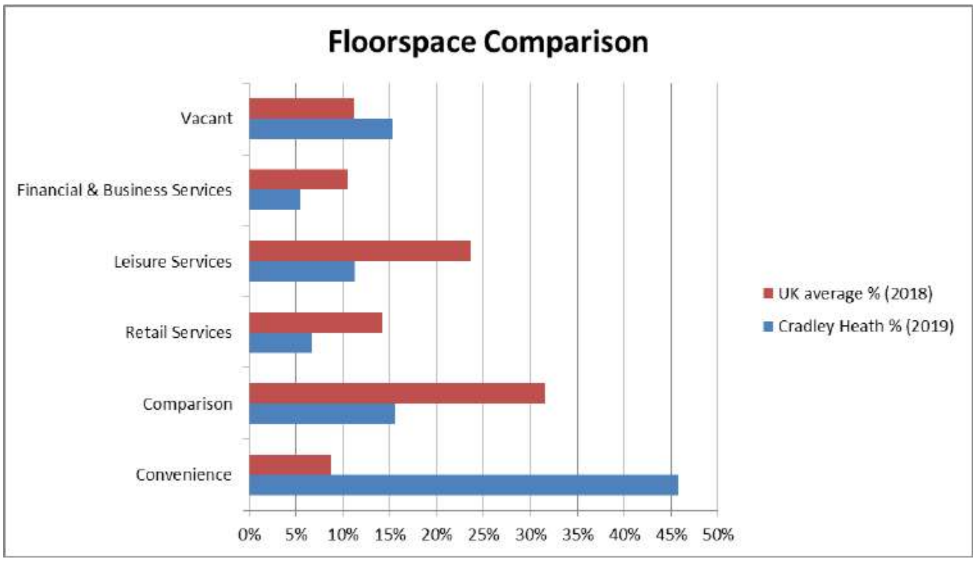
USES	The Town Centre has 127 total commercial units with a total floorspace of 24,740 sq.m; this is 7 less units and 4,268 sq.m less floors space than in 2009[1]. With the exception of vacancies, all categories of floorspace have decreased between 500-2,800 sq.m since 2009.

[1] Black Country Centres Study – 2009

Comparison goods make up 24% of Cradley's commercial units and 16% of the floorspace; this is an under-representation of 12% and 16% (respectively) when compared to the UK national average[2]. When compared to 2009 data there has been a decrease of 6 units and 534 sq.m of floorspace.

The number of convenience goods units is slightly above the national average at 15.7% compared to 15%. This is contrasted by the floorspace figures which show that Convenience Goods are significantly over-represented accounting for 46% of the total floorspace compared to a national average of 9%. At 6,690 sq.m, the Tesco Extra makes up 59% of the convenience floorspace, acting as an important anchor for the centre. Since 2009 the number of convenience goods units has increased by two whilst the floorspace has decreased by 2,768





The number of retail service units is 13% higher than the national average (20% to 7%) whilst the floorspace of these is 8% lower than average (7% to 14%). This shows that there is a high proportion of retail service units with small floorspaces, supported by the fact that the average size of one of these units is 66 sq.m. Business and financial services, and leisure services are both under-represented in the number of units and their floorspace. As a whole, the service sector has decreased by three units and 2,628 sq.m since 2009.

16% of Cradley's commercial units are vacant which represents 15% of the total floorspace; this compares to a national average of 9% and 11% respectively. Whilst the number of vacant units has

[2] GOAD, all centres, 2018

	remained the same since 2009, the level of floorspace of these has increased by 1,662 sq.m Spatially Cradley Heath has a fairly tight formation of small units periodically broken by larger units, all of which are dwarfed by the Tesco. There is no significant pattern in the distribution of uses though more comparison goods units are located towards the western end of High Street. The centre has a small number of national multiples including three convenience stores and a high street bank, and a limited range of community facilities which includes two churches and a medical practice.
PEDESTRIAN FLOWS	Cradley Heath was visited late afternoon on a Tuesday. Pedestrian numbers were highest around the Tesco, diminishing with distance from here with very few pedestrians observed at the south west junction of High Street. No pedestrians were seen within the Market Square which correlates with the high density of vacancies.
ACCESSIBILITY	Five bus stops are situated along the length of High Street providing services to multiple destinations including Merry Hill, Walsall, West Bromwich, and Birmingham. The Cradley Heath interchange and train station are located several hundred meters east of the eastern centre boundary. There is one pelican crossing point across High Street at the entrance to the market, and several dropped kerb areas for further crossing. High Street was not overly busy with vehicular traffic during the visits and there were plenty of opportunities to cross the road. Pelican crossings are present across all roads at the south western end of High Street. Wide pavements are present outside of the Tesco which continue south westerly towards the Cradley Heath Market; from this point on, the pavements become narrower and less accessible. The following comprise parking within the centre: • c.400 spaces – Tesco Extra • c.100 spaces – Lidl • Various on-street parking – generally 2 hours free
PERCEPTION OF SAFETY	The area felt safest around the Tesco diminishing the more one moved towards the south eastern end of High Street. The lack of any pedestrians and proportionally high number of vacancies made Market Square feel less safe than elsewhere. It is also noted that no CCTV cameras were observed. Cradley Heath's evening activity is limited to two restaurants, two Pubs and one bar. Given how quiet the centre appeared during the day it is safe to assume that there are a limited amount of people using the centre in the evening. A lack of evening activity generating uses could lead to increased anti-social behaviour.
ENVIRONMENTAL QUALITY	The area immediately surrounding the Tesco is of good quality with sufficient planting and street furniture and higher quality paving. Outside of this area there are many units with tired and dated frontages; Market Square has a particularly poor environmental quality, exacerbated by the highest proportion of vacancies in the centre.  Market Square (view south east)  High Street (view south west)

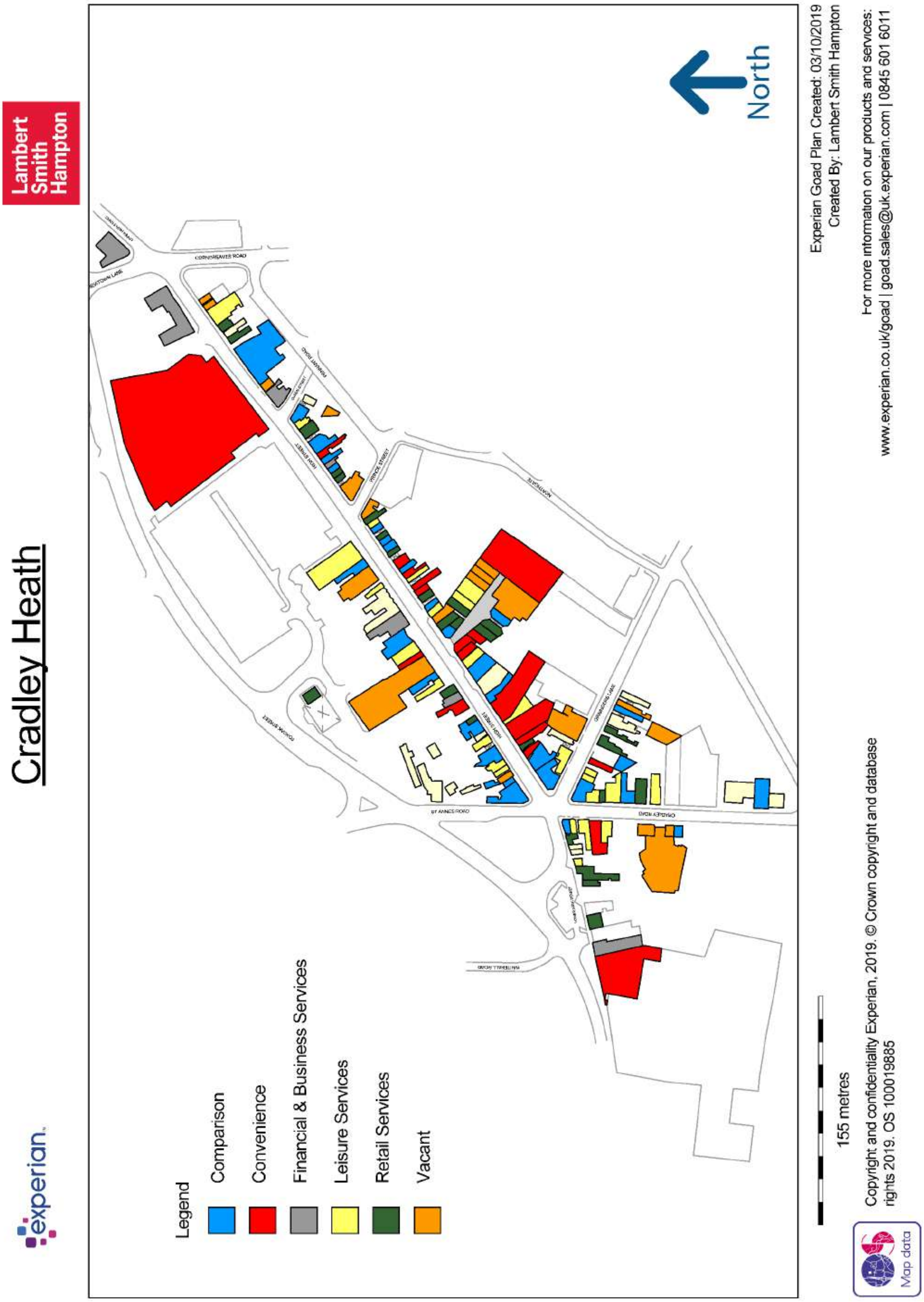
	The area is predominantly comprised of two storey terrace buildings varying in period and style, with a tendency towards red brick façades. There are no listed buildings or conservation areas within the centre. Away from the vicinity of Tesco there is a distinct lack of street furniture and planting. Though there are limited opportunities for this in a typical linear high street, where there is space available (such as the area at the pelican crossing on High Street,) this is still lacking. The quality of paving is somewhat consistent throughout the centre although diminishes with distance from the Tesco. On the whole, Cradley Heath's environment is neither very poor nor very good but would benefit significantly from more investment.
CONCLUSION	Analysis of Cradley Heath's commercial units reveals that the centre is underperforming in many areas when compared to the UK national average. In terms of number of units and floorspace there is an under-representation of financial & business services, leisure services, and comparison goods. Retail services whilst above average in the number of units, are significantly below the average for floorspace. The only area that is wholly above average is convenience goods which are 1% above average in terms of number of units, and a significant 37% above average in floorspace. Even when discounting the Tesco there is an over saturation of convenience goods. Comparisons with 2009 data show that all uses have decreased in varying degrees over a 10 year period, with the floorspace of vacancies increasing by 78%. Collectively this highlights a concerning pattern in the centre's distribution of uses and change over time; indicating the heavy reliance on convenience, increasing vacancy floorspace, and decrease in all uses. The majority of the centre's frontages are in need of refurbishment and modernisation to improve the current tired and neglected appearance. An increase in street furniture and other decorative schemes such as planting could help to make the area both more attractive and more functional. Whilst Tesco will likely continue to perform well in Cradley Heath it is unclear how the larger centre will manage in the near future. A comparison between the centre now and in 2009 clearly shows it has declined over the 10 year period with little or no improvement in the general environment and decreasing commercial offering.

KEY ISSUES/SWOT	• **Strengths**
	  ○ Within walking distance from a transport interchange with rail and bus facilities;
	  ○ Significant levels of free parking at Tesco;
	  ○ Very strong anchor with Tesco Extra.
	• **Weaknesses**
	  ○ Declining uses by number of units and floorspace;
	  ○ Increasing vacancy floorspace
	• **Opportunities**
	  ○ Promote refurbishment and modernisation of frontages;
	  ○ Improve street furniture and other aesthetic elements.
	• **Threats**
	  ○ Continued decrease of all uses;
	  ○ Complete decline of centre.

RECOMMENDED DESIGNATION	The following could be explored through a tier-two plan review: **Town Centre Boundary** No alterations are proposed to the north eastern end of the Town Centre boundary; at the south eastern end the boundary should be expanded to include Lidl, the area of St Anne's Road removed due to a lack of any commercial units, and the boundary should end at the post office on Cradley Road again due to a lack of occupied commercial units. **Primary Shopping Area** The current Primary Shopping Area appears to contain the majority of High Street ending at the Five Ways junction to the south west, and the junction of High Street and Queen Street to the north east.

	There are no proposed changes to this.

Lambert Smith Hampton



Lambert Smith Hampton

Appendix 13: LPA: Sandwell: Centre – Great Bridge

GREAT BRIDGE TOWN CENTRE

ADDRESS (and Zone)	Great Bridge Street / Market Place, Great Bridge, Tipton
DESCRIPTION	This a traditional linear centre consisting of the roads Market Place and Great Bridge, which form a V-shaped intersection in the middle of the area. A Lidl store, and the site of the outdoor market, anchors the centre at its western edge and a large Wilko store is present in the centre. The Town Centre extends slightly down Whitehall Road at its eastern edge. To the immediate north lies the A461, with a junction onto Market Place, and this provides access to a large retail park which comprises a large Asda alongside a Boots, discount retailers (Poundland and Poundstretcher) and fast food restaurants (McDonalds and KFC), with a total of approximately 3,200 sq.m (source: Completely Retail). Although this is technically within the Town Centre it appears to operate very independently of it, with an abundance of car parking and reliance on car access. It is physically separated from it by the Walsall Council, although there is a footbridge across this leading directly to Great Bridge Road (approximately a 4 minute walk, although the route is narrow and uninviting). The analysis below focuses on the traditional high street centre and does not include Great Bridge Retail Park. The traditional centre includes two markets: the outdoor market operated by the Council (open 2 days a week) and a private indoor market (30-50 traders, open 4 days/week). Both are focused on bargain sales.
CURRENT STATUS	Town Centre

PHOTOGRAPHS:

Great Bridge

Market Place

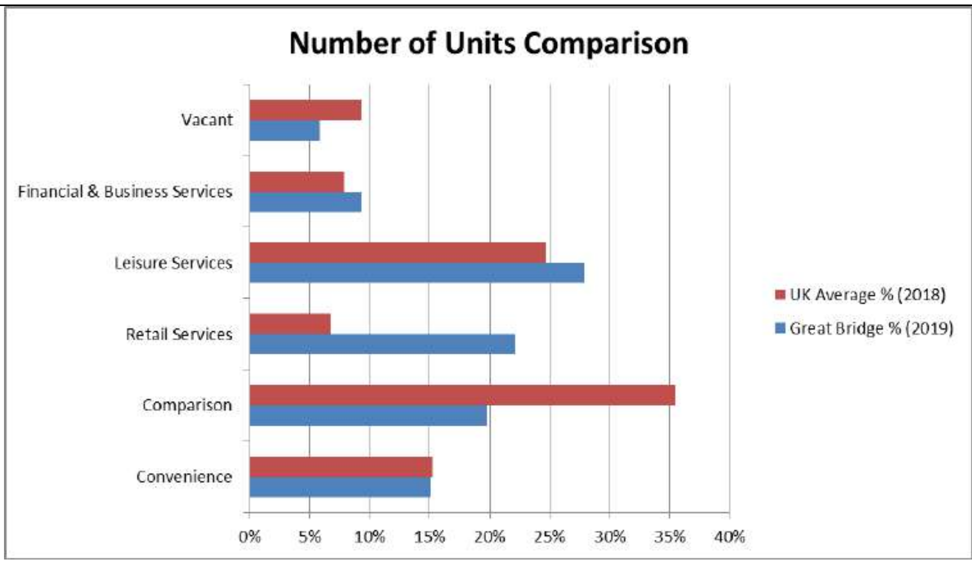
DIVERSITY OF USES	No.	Floor Space (sq.m)
Convenience	13	2,860
Comparison	17	4,400
Retail Service	19	1,460
Leisure Service	24	2,880

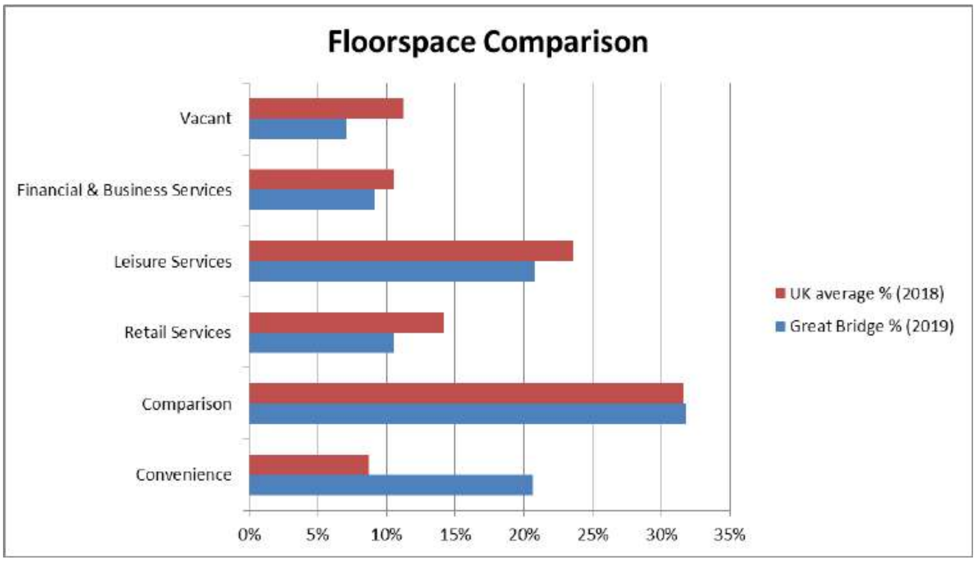
COMMUNITY FACILITIES	TOTAL: 2
• Sai Surgery Great Bridge Partnership • Great Bridge Library	

NATIONAL MULTIPLES	TOTAL: 7
• Barclays Bank • Betfred • Subway • Lloyds Bank	

Financial & Business Services	8	1,270	• Hallmark • Wilko • Lidl • Asda* • Poundstretcher* • Poundland* • Boots* • KFC* • McDonalds* *at Great Bridge Retail Park	
Vacant	5	980		
Total No. Of Uses	**86**	**13,850**		

USES	Great Bridge currently has 86 commercial units with a total floorspace of 13,850 sq.m. 2009 data appears to also include Great Bridge Retail Park which is not included within the 2019 Goad data. As such, a comparison of the number of units and their floorspace over the past 10 years is not directly comparable. However, the 2009 study recorded 90 units; it is likely that this comprised 86 units in the traditional centre and four in the Retail Park, meaning that the traditional centre has remained the same size and the two drive-through restaurants have been added to the retail park in the interim (these were not mentioned in the 2009 report). In 2009 there were four vacant units and there are now five vacant units. Therefore the centre is generally very consistent in size, and stable in the level of vacancies over the last ten years. The various commercial uses of Great Bridge are evenly spaced through the centre with no clear patterns or grouping. The units themselves are typically small (<160 sq.m) and are grouped in teraces, occasionally broken by larger stores, lanes, or empty areas. There are very few community uses within or nearby the centre, with only a library and medical centre noted. There are seven main national multiples (excluding the Retail Park) which are evenly distributed around the centre (these include Barclays and Lloyds bank, the Lidl store and various bookmakers). The number of comparison goods units makes up 20% of the centre's uses, 16% below the UK national average of 36%. When comparing floorspace, comparison goods make up 32% of the centre's total, exactly aligning with the national average. This level of comparison goods is above average when compared to nearby Town Centres, suggesting a stronger market presence. Convenience goods account for 15% of Great Bridge's commercial units which aligns with the national average; however, the floorspace of these units makes up 21% of the centre's total which is 12% above the national average. This over-representation of convenience goods can mostly be attributed to the relatively large 1,380 sq.m Lidl which represents 48% of all convenience floorspace in the centre. Again, this high level of convenience floorspace is typical for these Town Centres which tend to have one or several large floorplate supermarkets.





The floorspace levels of retail services fall 4% below the national average at 11% compared to 14%; however, In terms of number of units retail services are 15% higher than average at 22% compared to 7%. This shows that there is a high volume of small floorplate retail service units, a trend throughout most local Town Centres. 11 of these 18 units are hairdressers.

Leisure services closely align with the national average, with the number of units making up 28% of the centre's total (3% above average), and the floorspace totaling 21% of the centre's total (3% below average). These levels are above average when comparing Great Bridge to other Town Centres, and suggest a comparably healthier leisure market. However, it is worth noting that 50% of these leisure services are takeaways; this limits the evening generating uses to the three restaurants in the centre.

A highlight of Great Bridge is the relatively low level of vacancies at 5 units, which is 3% below average in terms of number, and 4% below average in floorspace.

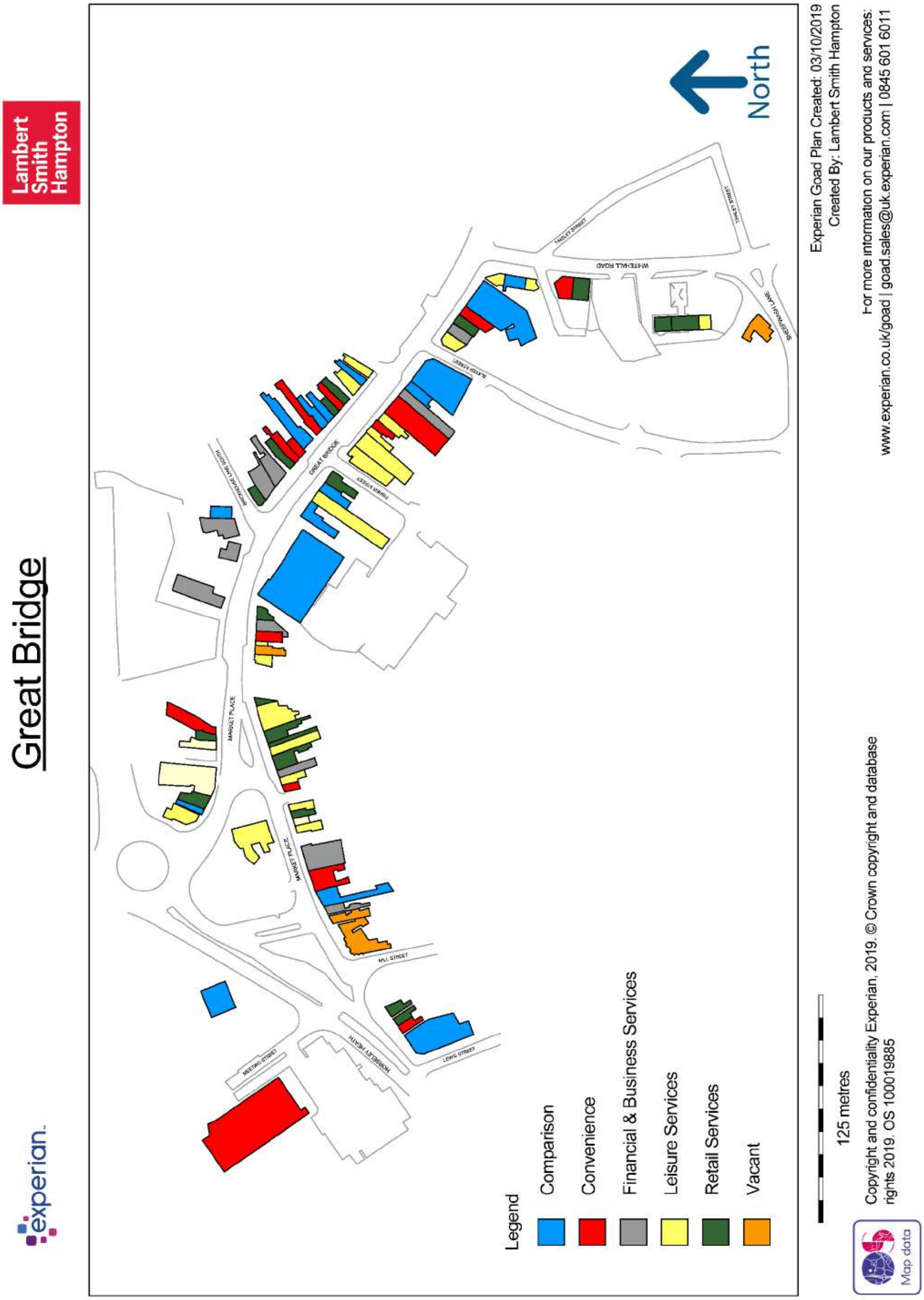
PEDESTRIAN FLOWS

The site visit was undertaken on a weekday, early afternoon during the school summer holidays. It was not a market day. Market Place and Great Bridge experienced significant through traffic, making the centre feel busy. However, the pavements were generally quiet with few pedestrians. There were a few more people walking outside the Lidl store.

Only one or two people were observed using the footbridge to the retail park.

ACCESSIBILITY	The centre is dominated by road traffic, to the significant detriment of pedestrian movement. Pavements vary from being wide (i.e. outside Lidl) to being narrow (around Market Place) and sometimes pedestrians have to contend with cars parked on the pavement. Crossing the road is only possible at signalled pedestrian crossings, which are relatively far apart (there are four within the centre). They are generally well located (one aligns with the footbridge to the retail park, and one with the market, although the crossing to Aldi is more difficult: being a staggered crossing and more indirect). Outside of these there are many safety railings and other clutter. All of this makes the centre particularly difficult for those with disabilities. The footbridge provides a direct, though unappealing, link to the retail park, though this is DDA accessible. The roads, in addition to being busy with traffic, are also relatively narrow and there is no cycle infrastructure, making the centre difficult for cyclists. Car parking is plentiful and cheap, comprising: 102 spaces at the outdoor market (80p for 2 hours) 26 spaces at Market Place (80p for 2 hours) 32 spaces at Whitehall Road (80p for 2 hours) 910 spaces at Great Bridge Retail Park (free) c.70 spaces at Lidl (free) The centre is easily accessible by road, although generally congested and the Retail Park is always going to be a more accessible and convenient destination than the traditional centre for those travelling by car. The centre is well served by regular bus services.
PERCEPTION OF SAFETY	The level of activity generally makes the centre feel safe from crime, although road safety is always a prominent factor. The outdoor market is a large open space without activity when the market is not on (which is relatively often) and so feels less safe). The pedestrian route to the retail park is narrow and lacks surveillance for much of its length and can feel unsafe.
ENVIRONMENTAL QUALITY	 Great Bridge  Market Place The environmental quality of the centre is undoubtedly poor. Aside from the issues of the secondary pedestrian environment to vehicle traffic described above, the public realm is particularly dated and in poor condition. Street furniture is highways dominated, of standard design and clutters the street. The built form is also poor. Buildings are either pot-war functional retail or historical properties that have been unsympathetically adapted (e.g. with out of proportion shopfronts) and are in generally poor condition. The Retail Park consists of large shed-like buildings set in a sea of car parking and is a poor environment.
CONCLUSION	Whilst the centre is unattractive and dominated by traffic, it is performing well, particularly in comparison to other Black Country centres. It is stable, with a good diversity of uses and a low

	vacancy rate. It performs a clear role in serving the essential needs of the local population at low prices.
KEY ISSUES/SWOT	• **Strengths** ○ Low vacancy rate ○ Anchored by Lidl and outdoor market ○ Healthy diversity of uses ○ Ample car parking • **Weaknesses** ○ Centre is dominated by heavy through traffic ○ Poor public realm ○ Poor physical environment ○ Poor quality pedestrian link to the retail park ○ Offer is limited to cheaper goods and services (e.g. only a discount supermarket, leisure sector dominated by take-aways, markets focus on cheap goods) ○ General lack of community facilities • **Opportunities** ○ The Outdoor Market site could be physically improved ○ The public realm and built form could be improved throughout ○ A better pedestrian environment and pedestrian prioritisation would be welcomed, alongside better cycle and DDA provision ○ Large cleared site at eastern edge of centre – has planning permission for 48 apartments • **Threats** ○ Great Bridge Retail Park draws trade away from the traditional centre and is reliant on private car use
RECOMMENDED DESIGNATION	The following could be explored through a tier-two plan review: **Town Centre Boundary** The centre is currently designated as a 'Town Centre' in the Sandwell Local Plan/ The current boundary of the centre accurately reflects the extent of the retail centre and does not require consolidation. The Town Centre designation does include Great Bridge Retail Park. Whilst the retail park and the main centre operate independently there appears little benefit in removing the former from the Town Centre boundary. However, better integration between the two elements is required in order for the retail centre to truly form part of the Town Centre. **Primary Shopping Area** There is no Primary Shopping Area boundary currently defined, and it is not recommended that one is need as the role of the centre is limited to retail and all parts within it are used similarly.


Great Bridge
North
Legend
Comparison
Convenience
Financial & Business Services
Leisure Services
Retail Services
Vacant
125 metres
GREAT BRIDGE
MARKET PLACE
MILL STREET
HORSLEY HEATH
LEWIS STREET
MEETING STREET
WHITEHALL ROAD
SHEEPWASH LANE
Experian Goad Plan Created: 03/10/2019
Created By: Lambert Smith Hampton
For more information on our products and services:
www.experian.co.uk/goad | goad.sales@uk.experian.com | 0845 601 6011
Copyright and confidentiality Experian, 2019. © Crown copyright and database rights 2019. OS 100019885
Map data

Appendix 14: LPA: Sandwell: Centre – Oldbury

OLDBURY TOWN CENTRE

ADDRESS (and Zone)	Oldbury Town Centre
DESCRIPTION	This Town Centre predominantly consists of the Sainsbury's supermarket/parking, the Sandwell Council offices, and a variety of commercial units along Halesowen Street, Church Street, and Birmingham Street.
CURRENT STATUS	Town Centre

PHOTOGRAPHS:

Halesowen Street (view north)

Birmingham Street (view east)

DIVERSITY OF USES	No.	Floor Space (sq.m)
Convenience	6	10,810
Comparison	13	1,820
Retail Service	21	2,660
Leisure Service	16	3,330

COMMUNITY FACILITIES	TOTAL: 11

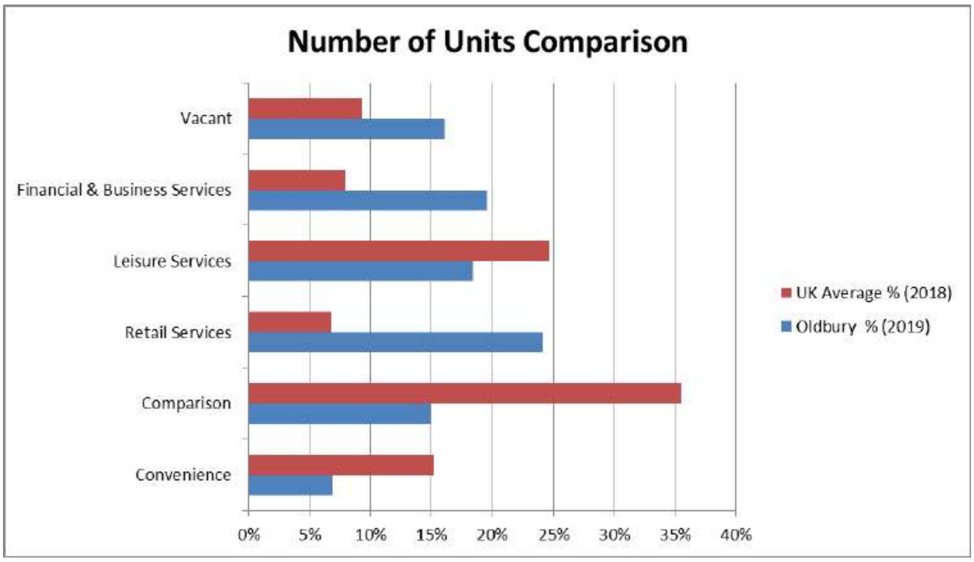
- Sandwell Council Offices
- Christ Church C of E Primary School
- Christ Church
- St Francis Xavier Catholic Primary School
- St Francis Xavier Catholic Church
- Bethel Church
- Oldbury Spiritualist Church
- Polska Rzymskokatolicka Parafia w Birmingham (Catholic Church)
- New Testament Church Of God
- Oldbury Library
- Oldbury Health Centre

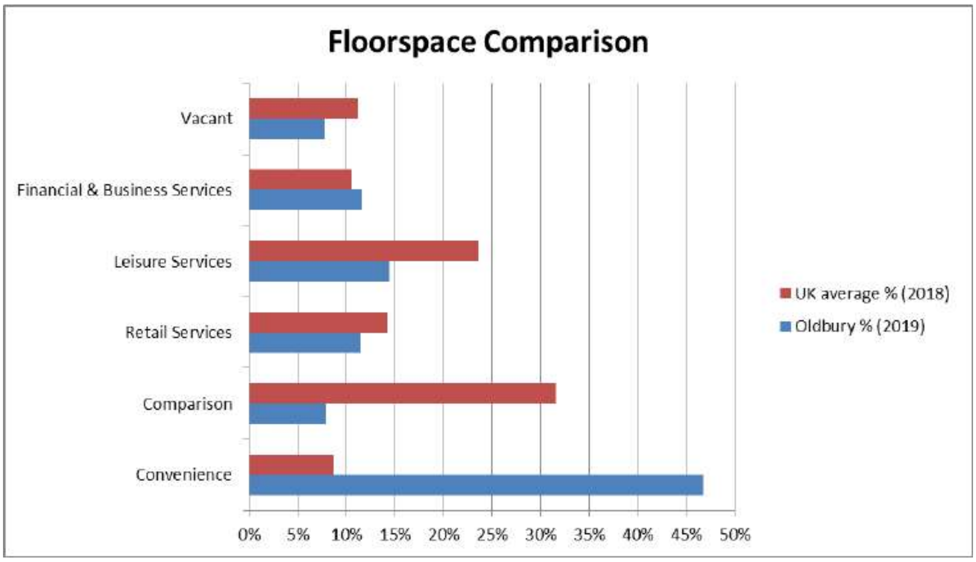
NATIONAL MULTIPLES	TOTAL: 9

- William Hill
- TSB
- Barclays
- Co-operative Funeralcare

Financial & Business Services	17	2,680	• Bella Italia • Sainsbury`s • McDonald`s • Lloyds pharmacy • Betfred	
Vacant	14	1,800		
Total No. Of Uses	**87**	**23,100**		

USES	Oldbury has 87 total commercial units, nine more than in 2009[1]. In respect of floorspace, since 2009 convenience goods have decreased by 933 sq.m whilst comparison goods have increased by 399 sq.m, and retail and financial services have collectively increased by 272 sq.m. 2019 data shows that comparison retail goods are under-represented both in terms of number of units and floorspace by 21% and 24% (respectively) below UK national average[2]. Though this is a significant difference and suggests trouble for the vitality and viability of the centre, there has been an increase of 399 sq.m in comparison goods floorspace since 2009. Given that the centre has neither sizeably increased nor decreased its overall commercial presence since 2009, it would indicate that the lack of comparison goods has not had a detrimental impact on the overall health of the centre.



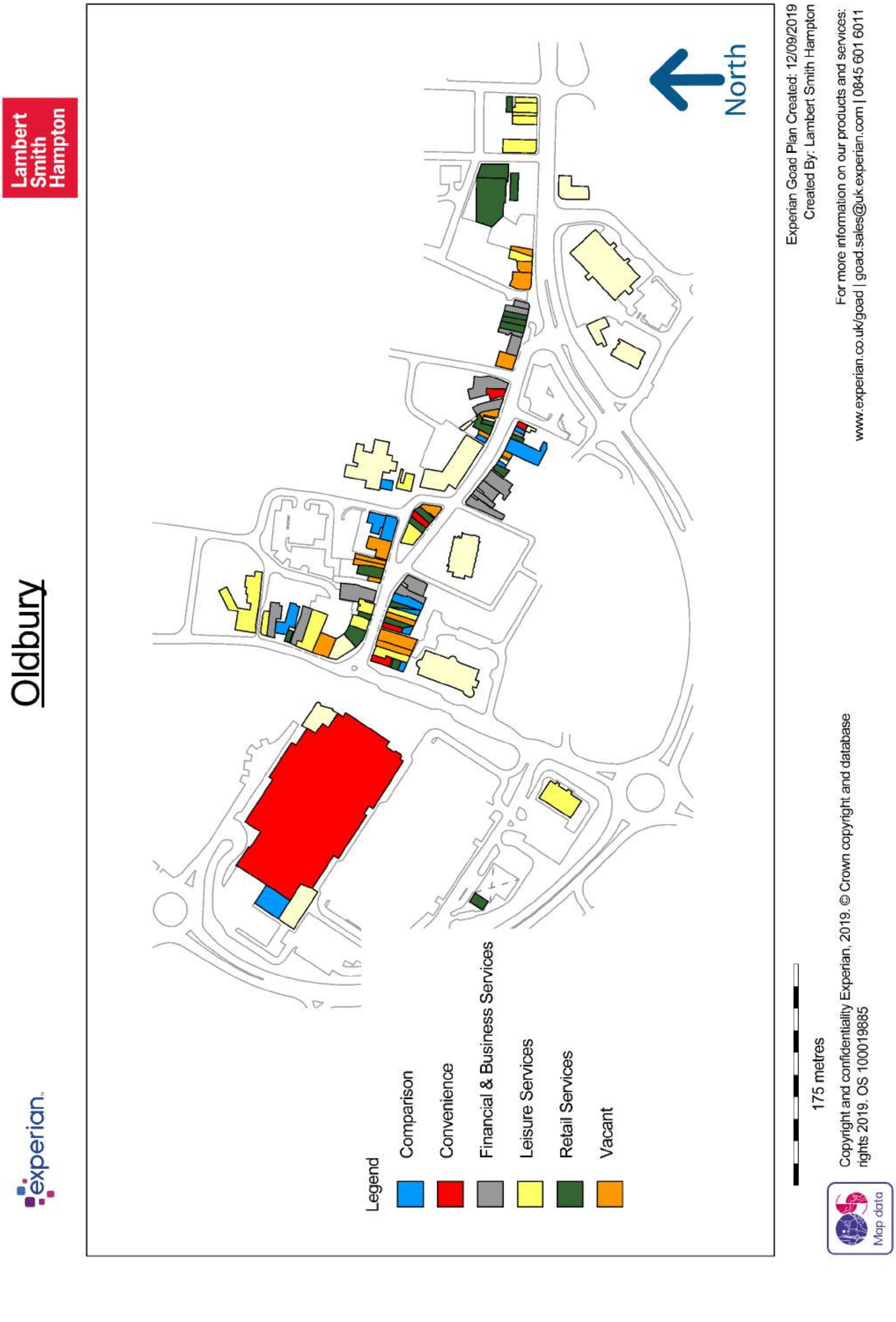


[1] Black Country Centres Study – 2009
[2] GOAD, all centres, 2018

	Convenience goods comprise only 7% of Oldbury's number of commercial units, 8% below the national average. Contrasting this, the floorspace of convenience goods is significantly over-represented comprising 47% of the centre's total commercial floorspace compared to a 9% national average. Sainsbury's represents 97% of this convenience goods floorspace, thus accounting for the small number of units but high volume of floorspace. Though providing a strong anchor, Sainsbury's monopoly on town centre convenience goods substantially limits consumer choice. Financial and business services, and retail services have over an average numbers of units (12% above and 17% above respectively) but comparable to average floorspace figures suggesting a high volume of small floorplate stores. Leisure services are under-represented both in terms of number of units and the floorspace of these. Vacancies have increased by 8 units and 769 sqm since 2009. When compared to the national average, Oldbury has a 7% higher number of vacant units, but these make up a 3% lower percentage of floorspace than the UK average. The land use map at the end of this section provides a visual representation of these land uses. The large Sainsbury's dominates the centre at over 10,000 sq.m contrasted by the other much smaller commercial units, the next largest being less than 1,500 sq.m. There is a high proportion of financial and business services towards the eastern end of Birmingham Street, with the preponderance of vacancies towards the western end. Oldbury contains an estimated nine national multiple's including two high street banks and a mixture of convenience goods and leisure services. The lack of national multiples (multiples) is likely related to the immediate proximity of the Oldbury Green Retail Park which features over 12 multiples. This retail park likely draws a significant amount of visitors compared to Oldbury's traditional high street accounting for both the low level of multiples, and the low levels of comparison goods stores. The centre is supported by a small range of community facilities including five churches, two schools a library, health centre, and Sandwell Council's main offices.
PEDESTRIAN FLOWS	The centre was visited on a late afternoon on a Tuesday, meaning that Oldbury's market was active, (operates on a Tuesday and a Friday from 9am to 2pm). The highest numbers of pedestrians were seen around the entrance to Sainsbury's and around the market stalls. The number of pedestrians decreased as the distance from Sainsbury's increased, with the fewest number of people observed at the eastern end of Birmingham Street. Collectively the centre appeared very quiet with pedestrians; additionally there was not a considerable amount of vehicular traffic.
ACCESSIBILITY	Seven bus stops are located on Halesowen Street near the entrance to Sainsbury's, with a further two situated on Church Street. No bus stops were noted along Birmingham Street. These stops provide regular services (at least every 10 minutes) to a variety of destinations including Dudley, Birmingham, West Bromwich. c. 700 spaces Sainsbury's – 3 hours free c. 76 spaces Albert Street – Pay and display long stay c. 52 spaces Low Town – Pay and display long stay There is a limited amount of on street parking through the centre with generally 1 hour maximum stays. The pedestrianised area immediately surrounding Sainsbury's and the war memorial is highly accessible and links very well to the Council offices. Three zebra crossings link this pedestrianised area and Sainsbury's to the wider centre across Halesowen Street. Birmingham Street also features three zebra crossings which help to prioritise pedestrians over vehicles. As previously stated, at the time of visit the centre was not overly busy with vehicle traffic and the zebra crossings made the centre feel very walkable. A minor issue was that various sections of Birmingham Street's pavements were quite narrow and difficulties may arise for wheelchair users or those with pushchairs when passing other pedestrians.

	It is noted that there is only one crossing point connecting Oldbury Green Retail Park to Oldbury centre; this crossing includes two sets of traffic lights connected by a traffic island. This does not promote pedestrian connectivity between the two areas.
PERCEPTION OF SAFETY	The perception of safety in Oldbury is strongly tied to both pedestrian densities and land use (see map at the end of this section) in that there was a strong sense of safety towards Sainsbury's and the market, which slightly decreased with distance from these. The sense of safety was also affected by lack of more active uses towards the eastern end of Birmingham Road Oldbury's evening activity generating uses such as pubs, bars, and restaurants is limited; this raises questions as to the perception of, and actual safety of the centre after the majority of commercial units have closed.
ENVIRONMENTAL QUALITY	The general environmental quality of Oldbury is very good, especially in contrast to some of its neighbouring towns. Though the character of the centre is varied, there is a uniformity of red brick buildings interspersed with smooth rendered white buildings. Whilst many shop frontages require some repair and modernisation, no buildings particularly stood out as being out of place in terms of character, or in need of significant works.  Halesowen Street (view north)  Birmingham Road (view north) Halsesowen Street and specifically the areas around Sainsbury's and the council offices present an attractive environment with relatively high quality paving, suitable street furniture and planting schemes. This level of quality diminishes with progression down Birmingham Road which features narrow pavements of inconsistent quality, and numerous vacant commercial units with poor frontages. The Town Centre features 19 Grade II and one Grade II* listed buildings, with the majority of the area falling within a conservation area. Many of the listed buildings and others present attractive early to mid 19th Century styles that provide the centre with a distinct character. Despite some issues, the centre is in general well-kept and attractive to visitors.
CONCLUSION	Oldbury Town Centre has not experienced a significant change in its commercial composition since 2009; having neither substantially decreased nor increased its various town centre uses. This suggests some stagnation in the centre which may be of concern given its under-representation of floorspace in various areas and significant lack of comparison goods uses. The breakdown of uses, observation of pedestrians, and evaluation of environmental quality all highlight the importance of the Sainsbury's to the centre. There is a significant reliance on Sainsbury's as an anchor store and although highly unlikely, the closure of this store would likely have significant impacts to the vitality and viability of the centre. Better integration is needed between the Town Centre and the highly occupied Retail Park. The large number of bus services and significant levels of parking relative to the size of the centre, make Oldbury very accessible.

	As stated the centre as a whole has a high quality environment, feeling both safe and attractive to visitors. Oldbury will likely continue to remain vital and viable, however there are indicators that comparison goods and other traditional high street retail may entirely leave the centre. It is therefore important that the area is managed in a way that plans for a potential transition to a completely service/convenience based centre, with traditional high street shopping undertaken elsewhere.
KEY ISSUES/SWOT	• **Strengths** o Generally high quality environment; o Historic buildings give character to the centre. • **Weaknesses** o Lack of comparison goods stores; o Heavily reliant on Sainsbury's as an anchor; o Poor links to the Retail Park. • **Opportunities** o Create better pedestrian links to Oldbury Green Retail Park; o Encourage more comparison goods retailers; o Enhance shop frontages along Birmingham Street. • **Threats** o Retail park continues to impact centre and reduce comparison offering; o Complete withdrawal of comparison goods and other traditional high street uses.
RECOMMENDED DESIGNATION	The following could be explored through a tier-two plan review: **Town Centre Boundary** The Town Centre boundary is well contained to the west by the Oldbury Ring Road; no boundary changes are suggested here. To the east the boundary follows the length of Birmingham Street to the junction on Birmingham Road. The only alteration here would be to include the whole health centre rather than the boundary intersecting it currently. **Primary Shopping Area** No existing Primary Shopping Area (PSA) has been identified and due to the nature of Oldbury as more of a service driven Town Centre, a PSA is not considered necessary.


Oldbury
North
Legend
Comparison
Convenience
Financial & Business Services
Leisure Services
Retail Services
Vacant
175 metres
Experian Goad Plan Created: 12/09/2019
Created By: Lambert Smith Hampton
For more information on our products and services:
www.experian.co.uk/goad | goad.sales@uk.experian.com | 0845 601 6011
Copyright and confidentiality Experian, 2019. © Crown copyright and database rights 2019. OS 100019885
Map data

Appendix 15: LPA: Sandwell: Centre – Wednesbury

Lambert Smith Hampton

WEDNESBURY TOWN CENTRE

ADDRESS (and Zone)	Union Street, High Bullen, Market Place, Lower High Street and surrounding streets, Wednesbury
DESCRIPTION	Wednesbury Town Centre is structured similar to a traditional market town centre, with roads converging around the central Market Place. The principal retail streets are the pedestrianised Union Street and the trafficked High Bullen and Lower High Street. Retail uses are also found on secondary streets. A large Morrison's supermarket anchors the centre from the west of Lower High Street. The site adjoins Walsall Street to the north, which provides access to the main road network. The centre has a large outdoor market on Union Street (trading three days a week) and an indoor market hall on Union Street (also trading three days a week).
CURRENT STATUS	Town Centre

PHOTOGRAPHS:

Union Street

Market Place

DIVERSITY OF USES	No.	Floor Space (sq.m)
Convenience	19	10,990
Comparison	49	8,590
Retail Service	36	3,590
Leisure Service	30	5,790
Financial & Business Services	14	1,720

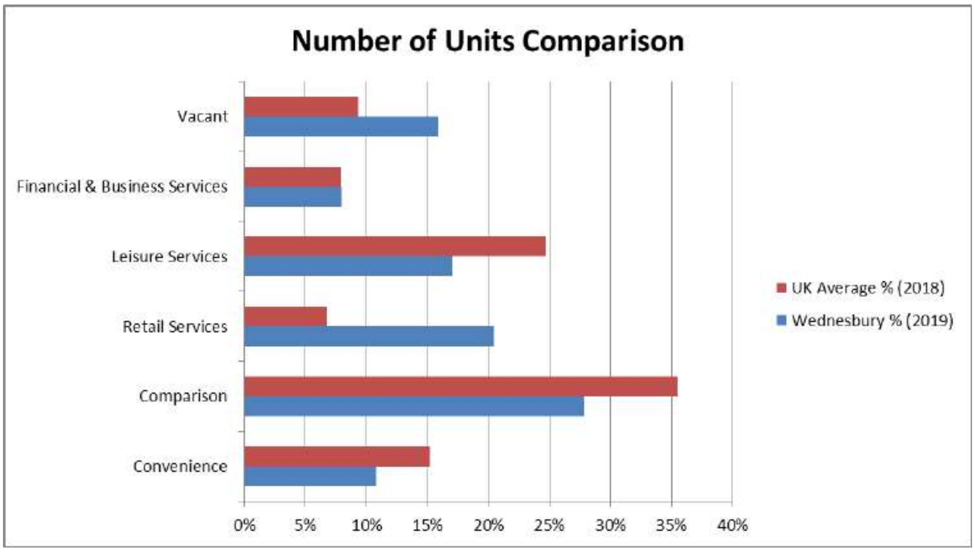
COMMUNITY FACILITIES — **TOTAL: 6**

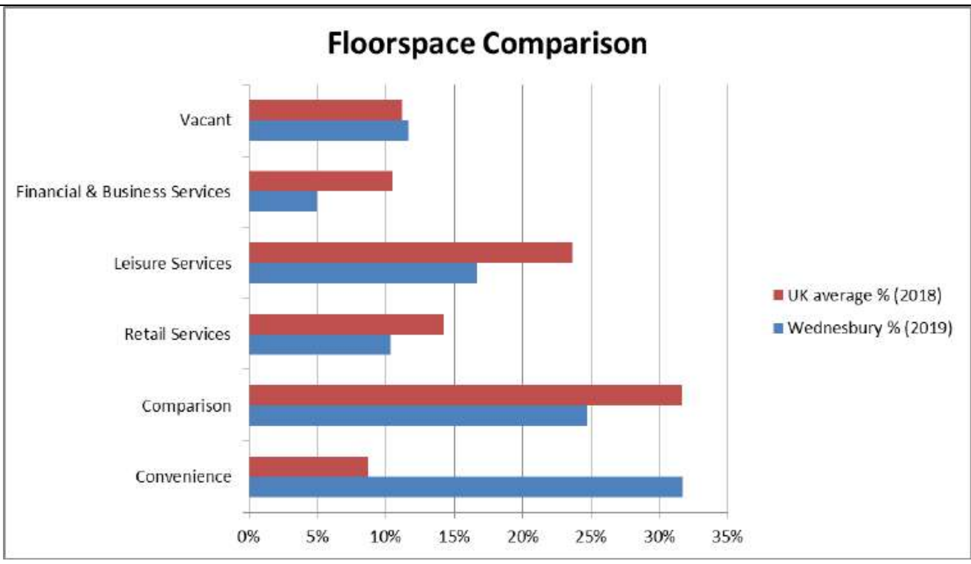
- Wednesbury Jubilee Health Centre
- The Spires Health Centre
- St Johns Primary Academy
- Wednesbury Central Methodist Church
- Wednesbury Leisure Centre
- Wednesbury Library
- Wednesbury Museum and Art Gallery

NATIONAL MULTIPLES — **TOTAL: 15**

- Poundland
- Lloyds Bank
- Betfred
- Ladbrokes
- Co-operative Travel
- First Choice

Vacant	28	4,040	• Co-operative Funeralcare • HSBC • Greggs • Barclays Bank • Iceland • Farmfoods • Card Factory • Morrisons	
Total No. Of Uses	**176**	**34,720**		

USES	Wednesbury has a total of 176 commercial units with a total floorspace of 34,720 sq.m; this is compared to 183 units (-7 difference) and 29,154 sq.m (+5,566 sq.m difference) in 2009, revealing a relatively large increase in floorspace, but a small decrease in overall units in the last ten years. Comparison goods units make up 28% of the centre's units, 8% below the UK national average of 36%. When comparing floorspace, comparison goods make up 25% of the centre's total, 7% below average. A small level of comparison goods is expected in this type of Town Centre. This sector has declined by number of units (9 less) but has maintained its share of floorspace since 2009. Convenience goods account for 11% of Wednesbury's commercial units which is 4% below national average; however, the floorspace of these units makes up 32% of the centre's total, which is 23% above average. This over-representation of convenience goods can mostly be attributed to the large 7,020 sq.m Morrisons which represents 64% of all convenience floorspace in the centre. Large floorplate anchor convenience stores are very typical in these types of Town Centre. Convenience goods have decreased in number of units by four, but increased floorspace significantly by 5,211 sq.m since 2009. 



The floorspace proportion of retail services falls 4% below the national average at 10% compared to 14%; however, in terms of the number of units retail services are 13% higher than average at 20% compared to 7%. This shows that there is a high volume of small floorplate retail service units, typical for this type of Town Centre. These are mostly hairdressers and beauty salons.

Leisure services are under-represented in terms of both number of units and floorspace, falling 8% and 7% below the national average respectively. Over a third (11) of leisure services are takeaways, with only one restaurant. However, this restaurant and the five pubs/bars that are evenly distributed in the centre will help to generate an evening economy. Collectively the service industry has lost four units and 1,767 sq.m since 2009. The centre still retains two high street banks: HSBC and Lloyds.

Vacancies have increased from 18 units in 2009 to 28 in 2019, or 1,914 sq.m in 2009 to 4,040 sq.m 2019. This currently repesents 15% of units; well above the national average of 9%. This is concerning, especially given its significant increase since 2009. In terms of floorspace though, it represents 12% which is very similar to the national average of 11%.

Retail, leisure and business and financial services are evenly distributed around the centre with no specific areas where these are grouped. Contrasting this, comparison and convenience goods are concerntrated towards Union Street though, are also present throughout the centre. Whilst Union Street has been a focus for comparison goods, this is also experiencing a higher amount vacant units. This must be a cause for concern: the dominance of high street (comparison) retail on this pedestrianised street leaves it vulnerable to futher vacancies given national trends.

The centre features a diverse range of community uses that includes an art gallery, leisure centre, library and primary school. National multiples are well represented and include serveral high street banks and supermarkets.

PEDESTRIAN FLOWS

The centre was visited on a weekday mid-afternoon during the school summer holidays (a non-market day). It was particularly quiet with limited footfall. There was more footfall Union Street, but the wide pedestrian area exacerbated the feel of a lack of activity and vibrancy. The roads were also mostly quiet of traffic (Walsall Road effectively forming a by-pass), though vehicle activity was concentrated on the complex junction at High Bullen/Market Place/Walsall Street. On-street parking is prevalent through the centre and this was well used, which did create a sense of activity.

ACCESSIBILITY

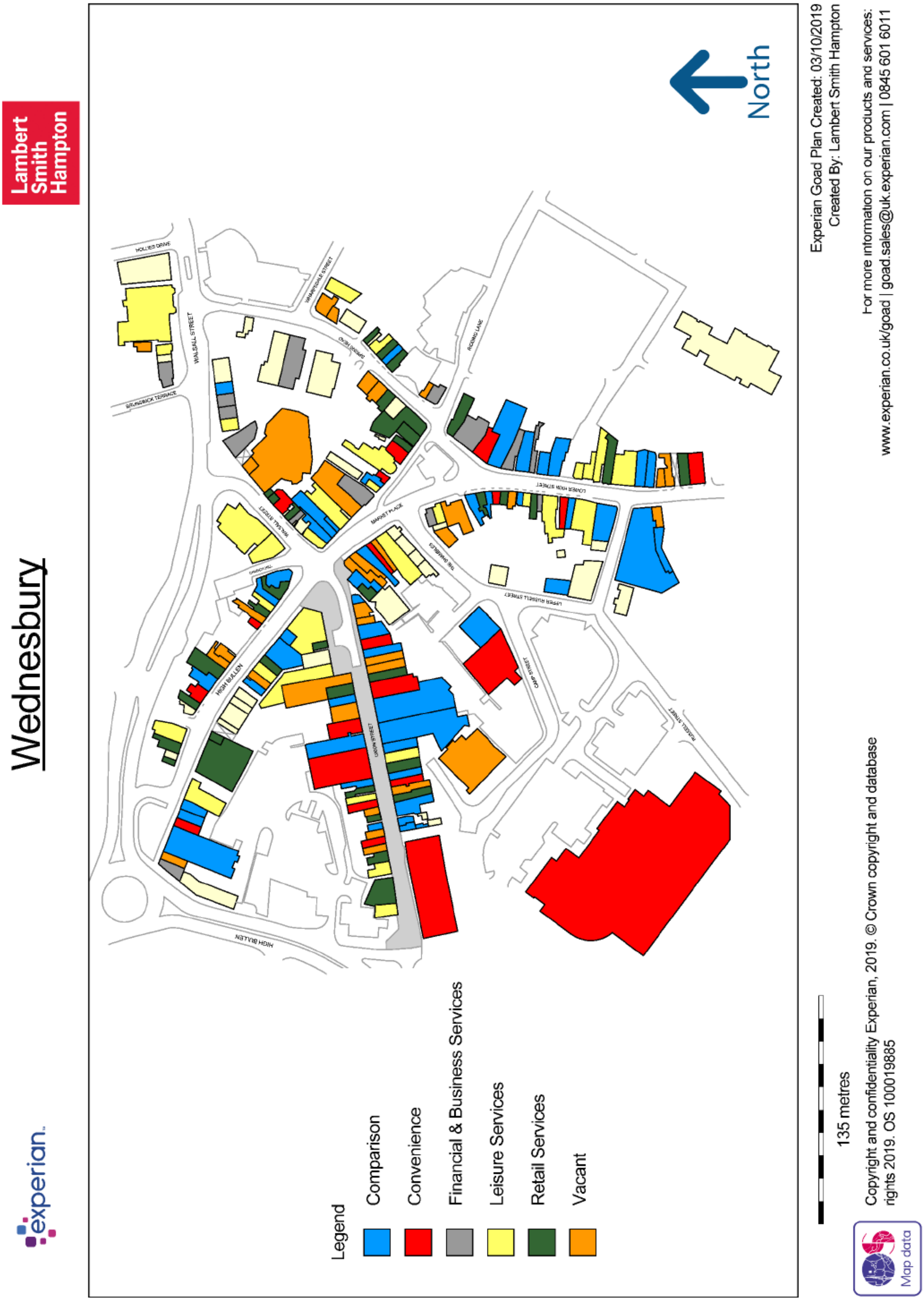
The centre is easily accessible by road via Walsall Street. Parking is plentiful and cheap. There would appear to be a surplus of parking available. Options comprise:

- High Bullen: 137 spaces (80p for 2 hours)
- Morrisons: 390 spaces (50p for 2 hours)
- Ridding Lane: 48 spaces (80p for 2 hours)
- Spring Head: 62 spaces (80p for 2 hours)

	There is also significant on-street parking available. The pedestrian environment is mixed. Union Street offers an easy pedestrian experience on its traffic free street. On other streets pavements are relatively narrow and cluttered with highway signage. The junction at Market Place/High Bullen is dominated by highways infrastructure and is somewhat difficult for the pedestrian to cross. The centre is well served by regular bus services with on-street stops and a large bus station at the end of Union Street.
PERCEPTION OF SAFETY	The centre generally feels safe, with buildings providing natural surveillance into streets and spaces that are well overlooked. Where vacancies are concentrated the streets can feel a little less safe. The outdoor market area can feel desolate and unsafe when a market is not operating, and this feeling can extend to surrounding parts of Union Street and the bus station. The fencing around the outdoor market appears somewhat hostile and does not promote a feeling of safety.
ENVIRONMENTAL QUALITY	Wednesbury has a more attractive and environment and a more distinct sense of place that most other centres in the Black Country. It clearly retains its market town role and something of this identity. Market Place and the buildings around it provided the historic focus for this and represent the basis of a distinctive presence: with the historic triangular space and historic street frontages. This is somewhat let down by the public realm here, which is dominated by on-street parking and highways infrastructure. The Town Centre is within a Conservation Area, although this is not immediately apparent on the ground. Unfortunately the outdoor market has now been moved from Market Place to the far end of Union Street. The permanent market stalls and public realm here do not represent a high quality environment. This is made worse on a non-market day when this becomes a desolate and unwelcoming space. This effect is worsened by its proximity to the bus station, which appears over-large and is overwhelmingly utilitarian. Throughout the centre the public realm is generally poor, being dated in its style. This is particularly noticeable on Union Street, where the expanse of pedestrianised space lacks interest. Street furniture is also of a standard appearance rather than providing anything distinctive. Union Street widens at its junction with High Bullen but this is not capitalised upon sufficiently within the public realm. Built form is mixed, with a good number of attractive historical buildings. Shopfront quality is varied but there are some good, though isolated, examples of well-designed traditional shopfronts.  Union Street  Outdoor Market
CONCLUSION	In summary, the centre appears to be relatively healthy with a generally good diversity of uses. The Morrison's store and the two markets serve to anchor the centre well. Union Street provides a focus for a relatively strong comparison sector for this grade of centre, but there are concerns for the sustainability of this, as seen by growing vacancies here. The centre has the basis of an historic and

	distinctive sense of place but little has been done to realise or maintain this. The Union Street public realm, coupled with the outdoor market significantly detracts from the overall environmental quality. Elsewhere, town centre uses are widely dispersed on streets that would seem to prioritise through traffic above the town centre environment. Although the centre is relatively healthy now it has declined significantly since 2009 and is in danger of further decline. Actions are recommended to address this. This should include diversification of town centre uses on Union Street, potential consolidation elsewhere and improvements to enhance the public realm and build on the local distinctiveness of the centre. It may be advisable to consider re-introducing a level of traffic back to Union Street in order to re-animate the street and the convenience of on-street parking to businesses.
KEY ISSUES/SWOT	• **Strengths** o Some strong townscape features (e.g. Market Place); o Significant historic building mix throughout the town; o Strong market function retained; o Large Morrison's store anchors the centre; o Very accessible by public transport with bus station; o Pedestrianised street offers ease of pedestrian movement; o Good provision of community facilities. • **Weaknesses** o Central junction is dominated by highways and is a weak pedestrian environment; o Union Street/Outdoor market/Bus station forms poor environment; o Need for a higher quality leisure sector. • **Opportunities** o Opportunities to make more of the sense of place, e.g. at Market Square; o Surplus parking may offer development opportunities. • **Threats** o Growing vacancies on Union Street as comparison goods sector declines; o Centre is somewhat over-reliant on Morrison's as the only supermarket present.
RECOMMENDED DESIGNATION	The following could be explored through a tier-two plan review: **Town Centre Boundary** The centre is designated as a 'Town Centre' in the Local Plan and does have the feel and scale of a Town Centre. The boundary is naturally formed by the Walsall Road dual carriageway to the north and west. At the eastern and southern edges it may be necessary to consider whether the boundary should be consolidated. The two car parks on Wharfedale Street and Ridding Lane for example may be excluded to allow the potential for these to be developed for residential use if they come forward as development sites. The southern boundary on Lower High Street matches the current extent of the centre but could perhaps be drawn back to Russell Street (which provides access to Morrison's). There are three vacancies south of this. **Primary Shopping Area** The centre does not have a Primary Shopping Area identified. It is recommended that one is not defined, as a flexible approach would best serve the future needs of the centre.

Lambert Smith Hampton



Appendix 16: LPA: Sandwell: Centre – Cape Hill

CAPE HILL TOWN CENTRE

ADDRESS (and Zone)	Cape Hill, Smethwick
DESCRIPTION	The Town Centre primarily consists of the Windmill Shopping Centre, Cape Hill road, and sections of surrounding roads: Waterloo Road, High Street, Shireland Road, and Windmill Lane.
CURRENT STATUS	Town Centre

PHOTOGRAPHS:

Cape Hill (view west)

Waterloo Road (view south west)

DIVERSITY OF USES	No.	Floor Space (sq.m)
Convenience	42	14,270
Comparison	58	12,130
Retail Service	47	3,530
Leisure Service	31	3,740
Financial & Business Services	16	1,800
Vacant	13	2,986

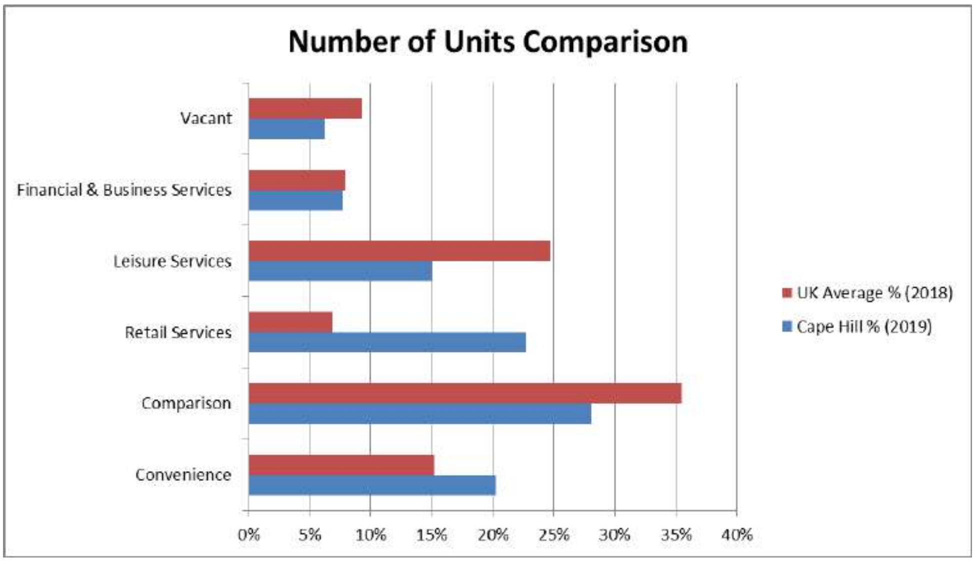
COMMUNITY FACILITIES	TOTAL: 9

- Citizens Advice Bureau
- The Cape Primary School
- Masjid Usman Smethwick (Islamic centre)
- Pakistan Islamic Centre Smethwick
- Victoria Health Centre
- Smethwick Gospel Hall
- Gurdwara Nanaksar (Sikh temple)
- Victoria Park
- Parkside Junior School

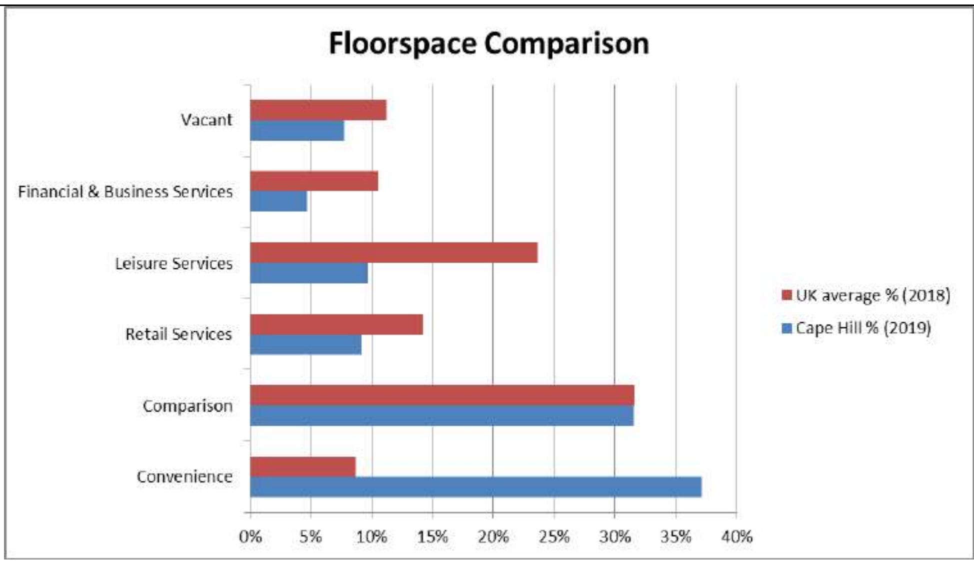
NATIONAL MULTIPLES	TOTAL: 11

- Asda
- Greggs
- Barclays Bank
- Farmfoods
- Dominos
- Matalan
- Shoe Zone
- Iceland

Total No. Of Uses	**207**	**38,485**	• Pure Gym • JD Sports • Dixons • William Hill	

USES	Cape Hill has a total of 207 commercial units with a total floorspace of 38,455 sq.m; this is compared to 198 units (-9 difference) and 36,585 sq.m (-1,870 sq.m difference) in 2009[1], suggesting a slight overall growth in the centre in the last ten years, which is positive. Comparison goods units make up 28% of the centre's uses by number of units, 7% below the UK national average of 36%. When comparing floorspace, comparison goods make up 32% of the centre's total, exactly aligning with the national average. For a Town Centre this is a healthy position, although this sector has declined by number of units and floorspace since 2009 by 11 units and 2,056 sq.m (respectively). The presence of the Windmill Shopping Centre directly within the Town Centre has a positive impact on the floorspace of comparison goods when compared to nearby Town Centres. Convenience goods account for 20% of Cape Hill's commercial units which is 5% above the national average; the floorspace of these units makes up 37% of the centre's total, which is 28% above average. This over-representation of convenience goods floorspace can mostly be attributed to the large 6,320 sq.m Asda which represents 44% of all convenience floorspace in the centre. The second and third largest convenience stores include Windmills Market (1,510sq.m) and PAK Supermarkets (1,290). Convenience goods have increased in both number of units and floorspace by 13 units and 2,908 sq.m since 2009. This shows that convenience retail is a major role for the centre. 

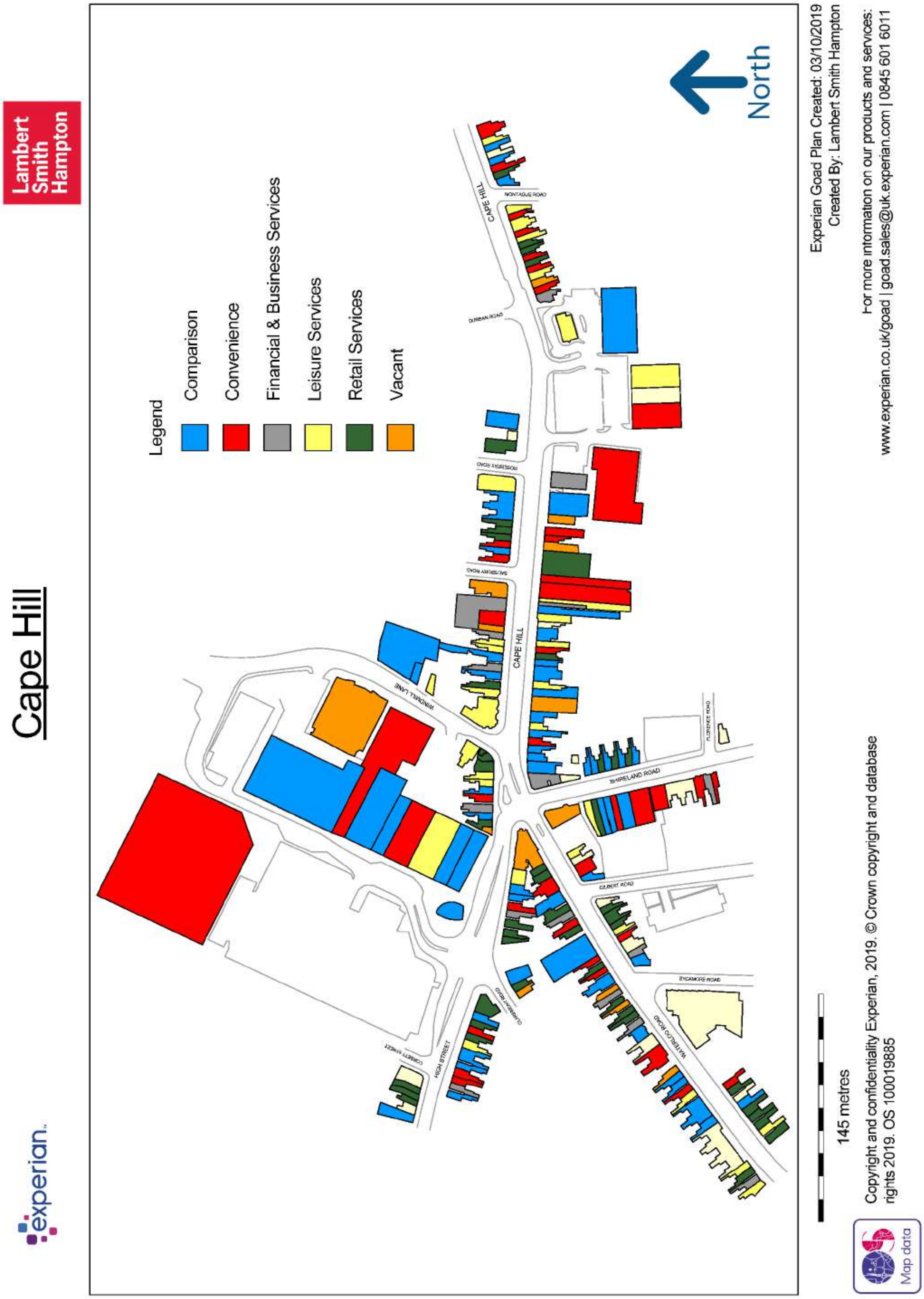
[1] Black Country Centres Study – 2009

	 The floorspace levels of retail services fall 5% below the national average at 9% compared to 14%; however, in terms of number of units retail services are 16% higher than average at 23% compared to 7%. This shows that there is a high volume of small floorplate retail service units, which is typical for this type of centre. Leisure services are under-represented in terms of both number of units and floorspace, falling 10% and 14% below the national average respectively. What leisure services there are, are heavily focused towards takeaways which make up 65% of the sector. Financial & business services align to the national average for number of units, but fall 6% below average for floorspace, again highlighting the prevalence of small units. Collectively the service industry has increased by 21 units and 346 sq.m since 2009, which is a positive sign. A key point to highlight at Cape Hill is a below average level of vacancies in terms of both number of units (13 vacant) and floorspace (2,986 sq.m) which stand at 6% and 8% respectively, both 3% below the national average. This centre is doing far better than many others in the Black Country, which are experiencing above average vacancy rates. It has also improved considerably since 2009, when it had a 14% vacancy rate (and that was with 9 more units in the centre in total). Spatially, Cape Hill has a tight formation of small units along its main roads with significantly larger units present at the Windmill Shopping Centre and medium sized units at the Cape Hill Retail Centre at the eastern end of Cape Hill. There is little pattern in the distribution of uses, though there is a somewhat higher proportion of comparison goods units towards the western end of Cape Hill road. There is a good presence of national multiples, most of which are unsurprisingly located within the Windmill Centre, with the remainder situated along Cape Hill road and the retail centre. There are a good number of community facilities, with a variety of religious institutions, two primary schools, and a health centre. Cape Hill also benefits from its adjacency to a large green space with Victoria Park.
PEDESTRIAN FLOWS	Cape Hill was visited late morning on a Tuesday in August 2019. Containing an intersection of two B roads and several others, the centre was busy with vehicular traffic. The centre was not particularly busy with pedestrians, though there were a consistent amount of people throughout most of the area. The busiest area observed was the pedestrian entrance to the Windmills Shopping Centre from Cape Hill, with many pedestrians moving between the shopping centre and eastwards down Cape Hill road. Shireland Road and Waterloo Road had an equal amount of people, diminishing further away from Cape Hill road. The centre became much quieter past the Cape Hill Retail Centre, perhaps due to its natural break in the high street format and no commercial units on the opposite side of the road. The quietest observed area was the western end of the centre boundary where the commercial units on High Street finish and rows of houses begin.

ACCESSIBILITY	Due to the presence of multiple busy roads, the centre is well connected for vehicles and contains at least eight different bus services to various destinations including Birmingham, Smethwick, and West Bromwich. There are a high proportion of pedestrian crossings at The Windmill Centre and the main junction on Cape Hill road; this is juxtaposed by the rest of the centre in which there is a clear lack of such crossings. A lack of crossing points negatively impacts pedestrian flows and makes it difficult to cross busy roads without heading towards The Windmill Centre. There is a high amount of well-located parking, much of which is free. The following comprises parking within the centre: • c.450 spaces Windmill Centre – Free • c.130 spaces Cape Hill Retail Centre – Free • c.33 spaces Gilbert Road West – Pay & display • c.28 spaces Gilbert Road East – Pay & display • c.35 spaces Shireland Road – Pay & display • Various on street parking – generally one hour free
PERCEPTION OF SAFETY	The consistent footfall throughout the centre made the area feel safer than its general environment would imply (poor quality). The high level of natural surveillance from the commercial units, and the constant flow of traffic make the area feel generally safe during the day. The centre has a general lack of leisure services the likes of which often generate evening activity, providing footfall and natural surveillance at night. Cape Hill only has one pub and four restaurants which significantly limits its evening activity, though there are 20 takeaways that are found throughout the centre. These uses promote activity which increases safety.
ENVIRONMENTAL QUALITY	Outside of the Windmill Centre the environmental quality of the area is generally very poor, with the majority of the shop frontages in need of significant maintenance and modernisation. Despite having a lower than average number of vacant units (proportionally), the low quality of the occupied properties makes the area feel like it is in a state of decline despite figures suggesting otherwise. The centre is dominated by rows of two to three storey terraced properties of varying styles and appearances though a general redbrick design. There are four listed buildings within the centre including the Grade II* Waterloo Hotel building. Unfortunately these listed buildings are not being utilised to their potential and their architectural quality is let down by their vacancy (all vacant), the poor quality of their upkeep, and the general poor quality of their neighbouring units.  Cape Hill Road (view east)  Waterloo Road (view north) The type and quality of paving varies across the centre; Shireland Road and Waterloo Road feature mostly red and grey bricked paving, whilst Cape Hill road comprises a mixture of concrete and dark brick. The centre would benefit from a consistent paving scheme of higher quality. The amount of traffic passing through the centre is a clear detracting environmental factor, exacerbated by awkward crossing points.

	Though constrained by pavement sizes and main roads, there is a lack of any significant street furniture or decorative finishes such as a planting scheme which would all raise the quality of the area.
CONCLUSION	In terms of commercial uses Cape Hill appears to be performing well, retaining high levels of comparison and convenience goods due in large part to The Windmill Centre, and a high number of retail services. There is a noticeable lack of leisure services, especially those that could generate evening activity. The environmental quality of the area is poor and the preponderance of units are in need of maintenance and modernisation. Attention should be directed to repurposing the four listed buildings, utilising their attractive architecture to encourage improvement in their vicinity. Street furniture and decorative schemes would improve the overall quality of the centre. Despite the issues with the environmental quality of the area, the centre appears to be functioning well. The Windmill Centre likely has a larger draw and catchment compared to that of the rest of the centre which serves a more immediate local need.
KEY ISSUES/SWOT	• **Strengths** ○ Very accessible by bus; ○ Strong comparison goods offer compared to nearby centres; ○ Windmill Centre as a whole provides a very strong anchor; ○ Low level of vacancies. • **Weaknesses** ○ Mostly poor quality frontages; ○ Lack of street furniture and investment in public realm. • **Opportunities** ○ Develop/repurpose listed buildings to capitalise on their attractive architecture; ○ Encourage refurbishment of poor shop frontages; ○ Invest in street furniture and public realm. • **Threats** ○ Loss of the pub or any of the restaurants, further decreasing evening generating activity; ○ Poor environmental quality begins to impact occupancy of units.
RECOMMENDED DESIGNATION	The following could be explored through a tier-two plan review: **Town Centre Boundary** The existing Town Centre boundary is considered to be appropriately sized, containing the necessary commercial units, whilst not being excessive. **Primary Shopping Area** It is considered that the current Town Centre boundary acts as an appropriate PSA.

Lambert Smith Hampton



Appendix 17: LPA: Sandwell: Centre – Bearwood

BEARWOOD TOWN CENTRE

ADDRESS (and Zone)	Bearwood Road
DESCRIPTION	This Town Centre covers the entirety of Bearwood Road (c.700m), stretching to Waterloo Road in the north and Hagley Road in the south in a traditional linear high street form. The centre also includes sections of a number of smaller roads off Bearwood Road such as Three Shires Oak Road and Sandon Road.
CURRENT STATUS	Town Centre

PHOTOGRAPHS:

Bearwood Road (view south)


Bearwood Road (view north)

DIVERSITY OF USES	No.	Floor Space (sq.m)
Convenience	34	7,230
Comparison	55	10,220
Retail Service	50	5,060
Leisure Service	55	10,365
Financial & Business Services	33	4,250

COMMUNITY FACILITIES — **TOTAL: 11**

- Lordswood Boys' School
- Medbank Health Care Solutions
- Sandon Road Methodist Church
- The Redeemed Christian Church of God House of Praise
- Bearwood Primary School
- Bearwood Chapel
- St Gregory's R C Church
- St Marys' C of E Church
- Bearwood Road Surgery & Pharmacy
- Bearwood Dental Care
- Complete Dental

NATIONAL MULTIPLES — **TOTAL: 26**

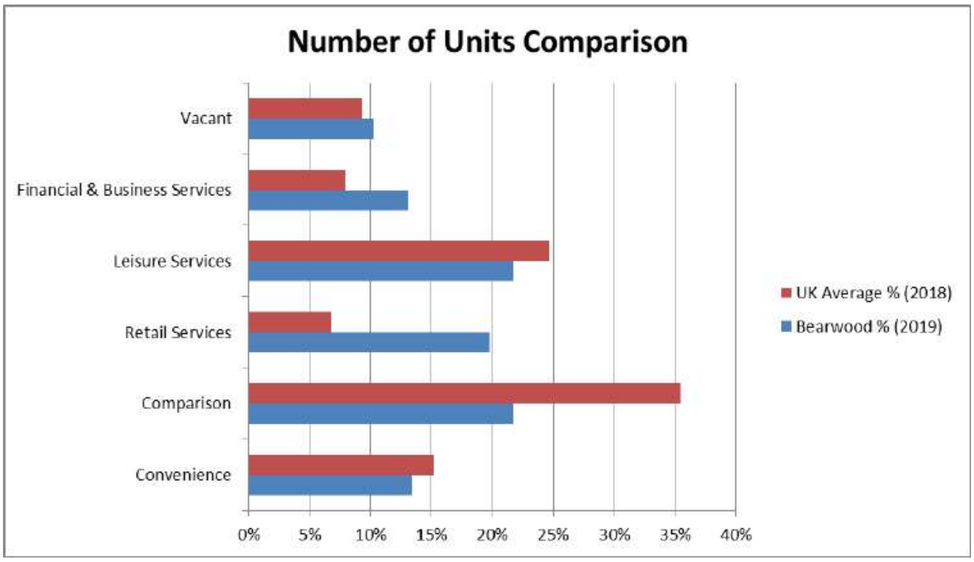
- Superdrug
- TUI
- Papa John`s
- Specsavers
- Specsavers Hearcare
- Poundland
- RSPCA
- William Hill
- Argos
- Paddy Power

Vacant	26	3,370	• Betfred • Card Factory • Costa Coffee • Halifax • Greggs • Lloyds Pharmacy • British Heart Foundation	• Iceland • Coral • Aldi • Peacocks • TSB • Subway • Barclays • Co-operative Food • Holland & Barrett	
Total No. Of Uses	**253**	**40,495**			

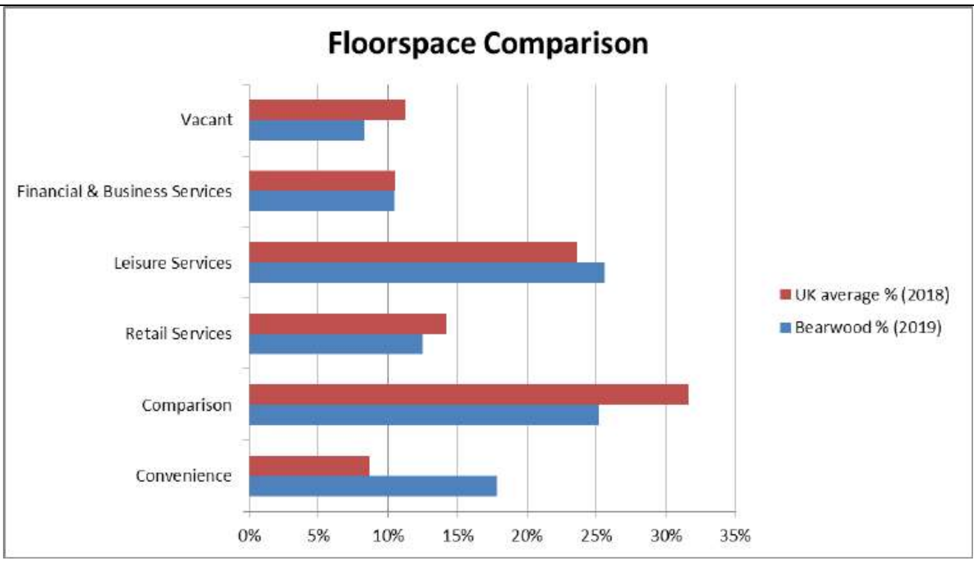
USES

Bearwood has 253 total commercial units, which is 12 less than it had in 2009[1]. The number of comparison goods units makes up 22% of the centre's total commercial units, 14% below the UK national average[2]. This under-representation is also reflected in the level of comparison goods floorspace which stands at 25.2% of the total commercial floorspace, compared to the national average of 32%. Since 2009 the number of comparison goods units has decreased by 21, with the floorspace decreasing by 1,365 sq.m (a 28% decrease in the number of units).

Convenience goods fall slightly below the national average for number of units at 13% compared to 15%. This is contrasted by the floorspace figures which show that convenience goods are over-represented, making up 18% of the total commercial floorspace compared to the national average of 9%. The small number of convenience goods units and large amount of floorspace is predominantly made up of Aldi, followed by Iceland, The Market, and The Co-op which collectively make up 52% of Bearwood's Convenience Goods floorspace. Aldi alone consists of 1,390 sq.m and acts as an anchor for the area in a prominent central place. There has been minimal change to the number of units and floorspace of Convenience Goods since 2009 with 4 additional units adding 141 sq.m.



[1] Black Country Centres Study – 2009
[2] GOAD, all centres, 2018



The levels of floorspace of retail services closely align to national averages though in terms of number of units are 13% higher at 20% compared to 7%. This shows that there is a high volume of small floorplate retail service units, typical for this type of centre. Leisure services are comparable to national averages in both number of units and floorspace. As a whole, service industry has increased by 8 units and 955 sq.m since 2009.

Vacancies are comparable to national averages at only 1% higher than the national average for number of units, and 3% lower in terms of floorspace. Since 2009 the number of vacant commercial units has decreased by 625 sq.m from 3,995 sq.m in 2009 to 3,370 sq.m in 2019, experiencing a decrease by 2 units.

The land use map at the end of this section provides a visual representation of these land uses. The large floorplate convenience stores are focussed towards the centre of Bearwood Road at the shopping centre, with vacant units appearing to be focussed towards the southern end of Bearwood Road. Outside of this there is generally an even distribution of commercial uses around the Town Centre.

Bearwood has a decent range of national multiples (26) which include three top highstreet banks, three leading supermarket chains and many other retail and service units. This provides the centre with a strong retail and service foundation that helps to support its role as a Town Centre, aiding the high number of smaller local shops. It is noted however that a number of multiples have left the centre including two highstreet banks, HSBC and NatWest.

The centre is supported by a range of community facilities consisting of 5 churches, 2 schools and various dental and medical services.

PEDESTRIAN FLOWS	Bearwood was visited at midday during the middle of the week and whilst traffic flow was consistently busy throughout the centre, pedestrian flows were not. Pedestrian numbers were highest towards the centre of Bearwood Road, specifically around Aldi, lessening with increasing distance from here in both directions. The northern and southern ends of Bearwood Road were the quietest observed locations, with the latter correlating with the higher density of vacancies than anywhere else in the centre.
ACCESSIBILITY	Due to the centre's nature as a linear A-road, it benefits from a high volume of bus services with numerous stops along the length of Bearwood Road and streets such as Three Shires Oak Road and Sandon Road. These stops provide frequent services across the Black Country including to Birmingham, Dudley, West Bromwich, and Oldbury. A small bus interchange is also present on Adkins Lane at the end of Bearwood Road. Eight pedestrian crossing points are present across the length of Bearwood Road providing vital routes for pedestrians across the heavily congested road. The wide pavements feature bollards and

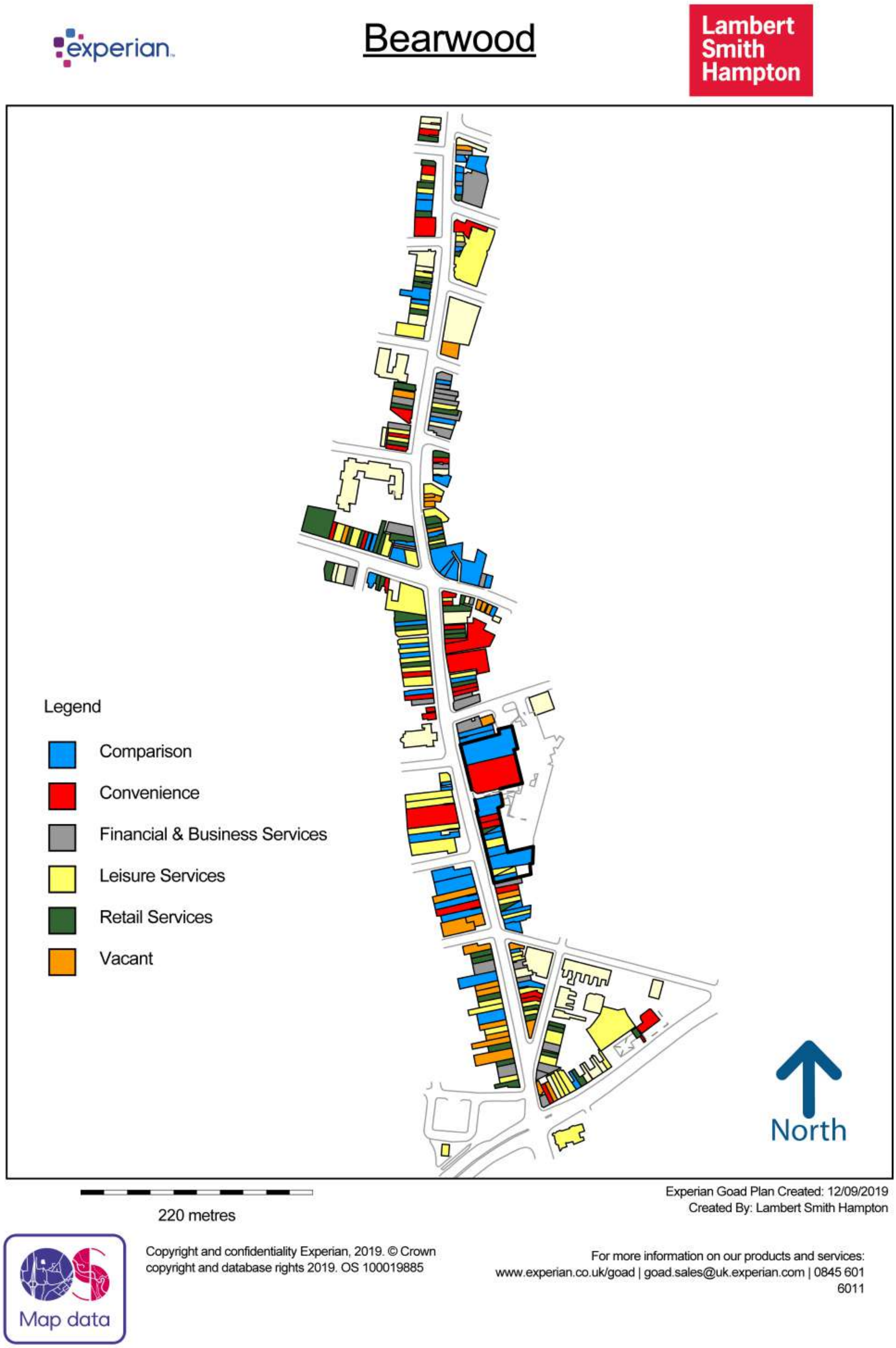
	barriers which provide some separation between pedestrians and vehicular traffic; these are specifically focused at junctions and around the Bearwood Shopping Centre. The high volume of traffic along Bearwood Road The following comprise parking within the centre: • c.120 spaces Aldi – Free • c.22 spaces Adkins Lane – pay & display max 4 hours • Various on street parking – generally 2 hours free Given the size of this town centre and the number of commercial units it is considered that there is a lack of parking.
PERCEPTION OF SAFETY	The significant level of natural surveillance provided by the commercial units along the length of Bearwood Road, combined with the significant levels of vehicular traffic and sizeable footfall make the area feel generally very safe during the day. Bearwood's evening activity is limited to its 7 restaurants and 5 bars and pubs; even when factoring in the 19 fast food takeaways there is still a clear lack of activity generating uses during the evening. Additionally a lack of these types of uses within certain areas such as around the shopping centre at the centre of Bearwood Road, could result in dead zones of activity during the evening. This could lead to criminal activity and will certainly lower the perception of safety. A number of CCTV cameras were noted, but they do not appear widespread; the presence of these increases the perception of safety.
ENVIRONMENTAL QUALITY	The character and period style of Bearwood's buildings vary considerably, with ranges from the late 19th Century up until present day. This creates a contrasting environment that works well in many places such as the blending of terracotta buildings around Bearwood Shopping Centre; however less so in other areas such as the sudden change in building height and style with the co-op and its surroundings.  Bearwood Road (view north)  Bearwood Road (view north) There is no conservation area in the centre, though both the Bearwood War Memorial outside St Mary's Church, and St Gregory's Church itself are Grade II listed. Additionally, there are a number of ornate buildings around the area including the Bear Tavern with its clock tower. Despite containing a number of attractive buildings and terraces Bearwood is let down by the high volume of commercial frontages in poor condition; this includes both local retails and some national multiples. Dated and excessive advertisements also detract from the character and quality of the area. There is a clear lack of street furniture and general investment in the public realm such as benches, planting and other landscaping schemes. Though the linear nature of the centre does limit the amount of space for such investment, there are clear areas that would benefit. At the southern end of Bearwood Road at the corner Adkins Lane there is an area of public space redeveloped at some point in the last five years. The redeveloped area features nice paving and a clock feature, however,

	is let down by having only a few benches which are awkwardly arranged. This is an example of an area that could be improved to encourage use of the space. Heavy vehicular traffic has a clear and obvious negative impact on the environmental quality of the area. Though this is unavoidable given the key function of the route, investment should be made in making the pedestrian environments as safe and appealing as possible.
CONCLUSION	Bearwood has experienced a slight decrease in its Comparison Retail goods and Vacancies, and slight increases in its Convenience Goods and Service sectors. Overall the centre appears to generally align with UK national averages, though there is a higher than average number of small retail service units and a lack of Comparison Goods stores. The minor fluctuations in the centre's commercial composition between 2009 and 2019 suggest that the centre is neither experiencing decline nor significant growth, continuing to perform well. Physically, many of the centre's frontages are tired and in need of refurbishment and modernisation in order to draw out the benefit of many of the visually attractive buildings. Additionally, the area would benefit from some investment in street furniture and the general public realm. Whilst highly accessible by bus, parking appears quite limited in Bearwood. A parking assessment would be able to determine if the current level of parking provision is sufficient for the number of visitors to the centre. On the whole Bearwood continues to perform adequately as a Town Centre, remaining generally close to national averages. As such the Town Centre remains vital and viable.

KEY ISSUES/SWOT	• **Strengths**
	  ○ Very accessible by bus;
	  ○ Strong convenience anchor with Aldi;
	  ○ A number of attractive buildings.
	• **Weaknesses**
	  ○ Some poor quality frontages;
	  ○ Lack of street furniture and investment in public realm.
	• **Opportunities**
	  ○ Undertake a parking assessment to determine if the level of parking for Bearwood is sufficient;
	  ○ Encourage refurbishment of poor shop frontages;
	  ○ Invest in street furniture and public realm.
	• **Threats**
	  ○ Continued decrease of Comparison Goods;
	  ○ Over-saturation of small scale Retail Services.

RECOMMENDED DESIGNATION	The following could be explored through a tier-two plan review: **Town Centre Boundary** The current Town Centre boundary extends from the junction of Bearwood Road and Hagley Road to the south, through to Waterloo Road to the north. No boundary changes are proposed to the south as the retail units here form a logical and continuous extension to the core of Bearwood. Boundary changes are suggested for the northern end of Bearwood Road, with the proposed new boundary ending at the junction of Linden Road and Bearwood Road. A number of reasons inform this decision; past this point the retail units on the eastern side of Bearwood Road are set back from the street and cause a break in the high street line that is not reformed. Additionally, the dominance of residential properties on the western side and lack of continuous commercial units in general distinctly separate this area from the rest of the Town Centre. **Primary Shopping Area** A Primary Shopping Area exists and currently extends from the junction of Bearwood Road and Hagley Road to the south, through to the junction of Bearwood Road and Belmont Road to the north.

	No changes are proposed to the northern boundary; however, it is proposed that the boundary is reduced to the south and should not include the units on Hagley Road or the bus depot.


experian.
Bearwood
Lambert Smith Hampton
Legend
Comparison
Convenience
Financial & Business Services
Leisure Services
Retail Services
Vacant
North
220 metres
Experian Goad Plan Created: 12/09/2019
Created By: Lambert Smith Hampton
Map data
Copyright and confidentiality Experian, 2019. © Crown copyright and database rights 2019. OS 100019885
For more information on our products and services:
www.experian.co.uk/goad | goad.sales@uk.experian.com | 0845 601 6011

Appendix 18: LPA: Walsall: Centre – Bloxwich

Lambert Smith Hampton

BLOXWICH TOWN CENTRE

ADDRESS (and Zone)	High Street, Bloxwich
DESCRIPTION	The Town Centre is a linear centre focused on High Street. The Primary Shopping area extends between the junctions with Wolverhampton Road and Church Street. The Town Centre boundary is somewhat larger than this and includes a large number of community uses, and some residential development. It also includes an Asda store that lies a short distance to the south-east of the retail core. In addition to the units on High Street, the centre also includes Market Place - a small square with temporary outdoor market (3 days/week) – located off High Street within the retail core. Market Place is also adjacent to recent retail development including a Wilko, Iceland and Home Bargains.
CURRENT STATUS	Town Centre

PHOTOGRAPHS:

DIVERSITY OF USES	No.	Floor Space (sq.m)	COMMUNITY FACILITIES	TOTAL: 16
Convenience	16	6,410	All Saints National Academy (primary school) Bloxwich Park Promenade Garden Pat Collin Memorial Garden St John's Methodist Church Bloxwich Memorial Club St Peter's RC Church Bloxwich Fire Station Field Road Surgery St Mary's Surgery Bloxwich Active Living (leisure centre) Bloxwich Hospital Police Station All Saints C of E School Bloxwich Library Dental Surgery	
Comparison	37	9,100	**NATIONAL OPERATORS**	**TOTAL: 16**

Retail Service	26	3,370	Asda J D Wetherspoon Subway Poundworld Martin's Lloyds Pharmacy William Hill Greggs Betfred HSBC Lloyds Bank Rowlands Pharmacy Co-operative Travel Agent Home Bargains Iceland Wilko	
Leisure Service	36	7,130		
Financial & Business Services	14	2,570		
Vacant	16	1,440		
Total No. Of Uses	**145**	**30,020**		

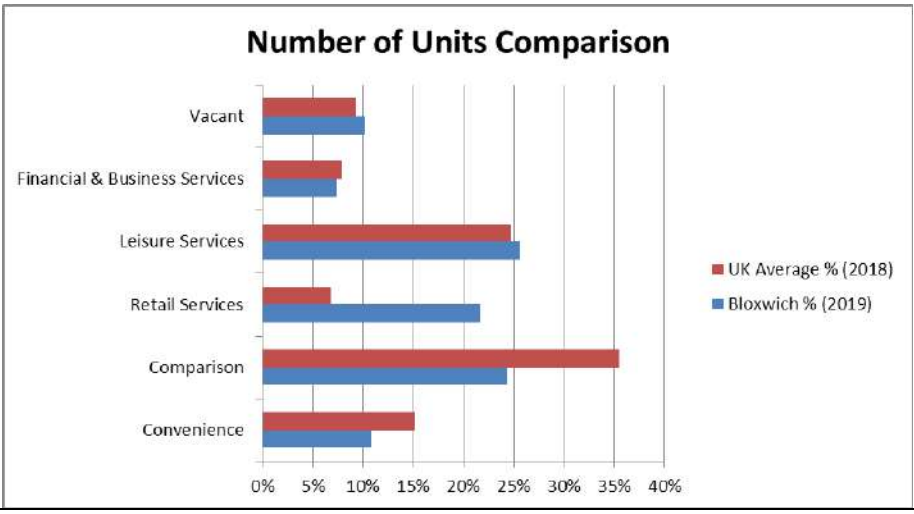
USES

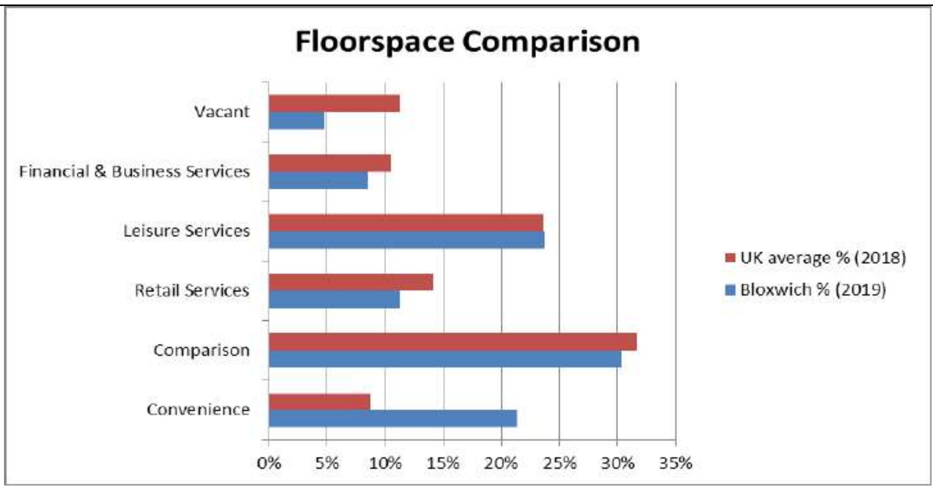
The Town Centre has 145 units and provides a good range of uses. In comparison to the national average (GOAD, all centres, 2018) it has a slight under-representation of convenience units (11% compared to 16%) and an under-representation of comparison units (25% compared to 35%) - however that is not unusual for a centre of this size. The vacancy rate is 11% which is slightly above the national average of 9.3%. The uses are mixed throughout the length of High Street, with no clear grouping by sector.

The centre has a good range of national operators. Asda is the main anchor use, although it is somewhat removed from the retail core. The cluster of Home Bargains, Wilko and Iceland also form an important anchor (with the market also located here). Elsewhere, the other national operators are generally smaller units such as bookmakers, pharmacies and leisure uses. The centre is in the strong position of having two of the main national banks present, although it has lost Barclays since 2018. The banks are clustered together in the middle of High Street.

In addition to the retail uses the Town Centre offers a very good range of community uses, including health, education, churches, open space and emergency services. The Town Centre boundary extends widely beyond the retail centre.

In 2009 Bloxwich had 149 units so it has proved stable in recent years, maintaining a similar number of units (2009 Retail Study, GVA), which is a positive indicator. The centre had more comparison units at this time (45 units) but a similar vacancy rate (17 units). The largest growth area has been in the number of service units (of all types). This has risen from 71 to 81 units. The only significant trend from 2009 therefore has been the conversion of nine comparison units (20% of the comparison units) to retail services.



	 The 2016 Venuescore rank of the centre is 1008, the centre being classified as a 'District Centre'. It has declined somewhat since 2014, when it had a rank of 935, and more gradually since 2010 (when it was 902).
PEDESTRIAN FLOWS	At the time of the visit, a midweek lunchtime, the centre was fairly busy with pedestrians. High Street carries a significant amount of through traffic and bus movement, there is also on-street parking along most of its length, leaving relatively narrow pavements for pedestrians. This perhaps made it appear busier than it was. The outdoor market was on, only some of the stalls were active but they were fairly busy (on a pleasant day in July).
ACCESSIBILITY	Parking options are fairly limited especially for longer stays, so this does not encourage dwell time. On-street car parking is available on High Street but this is limited to 1 hour only. Free parking is available at Elmore Row (51 spaces), easily accessible to the centre. Parking at Asda is limited to 2 hours. Signage makes it clear that parking is for Asda customers only. The pedestrian route from the car park to the retail core is indirect and subservient to vehicle traffic (with no dedicated pedestrian exit from the car park). This means that the Asda store is not physically anchoring the centre and supporting linked trips to the degree it could do. Bloxwich has a train station but this is somewhat disconnected from the retail core, located around 10 minutes' walk away. There is a proposal (Policy BX9) to move the station closer to the Town Centre, but the proposed location would be still somewhat disconnected. A small number (26) of free parking spaces are available at the station. Regular bus services are provided on High Street to Birmingham and Walsall (source: National Express West Midlands). The retail centre is located directly adjacent to surrounding housing, providing a significant catchment population able to easily access the centre via the streets off High Street. On High Street though, pedestrian movement is made more difficult by street clutter and safety railings. There is a significant amount of through traffic and limited pedestrian crossing points.
PERCEPTION OF SAFETY	The centre appears safe, with most areas active and benefiting from natural surveillance, and pedestrian routes generally on streets. On non-market days Market Place lacks surveillance in places and this could lead to a perception of poor safety when the market is not active and the adjacent stores are closed.
ENVIRONMENTAL QUALITY	The public realm is generally looking rather dated and in need of investment. Pedestrians have to compete with street clutter, railings, bus movement and heavy traffic. Market Place is a good and well-positioned asset, but its environment could be better, and the adjacent units could provide more active frontages. There are some good townscape elements within the town: the various parks around High Street, the

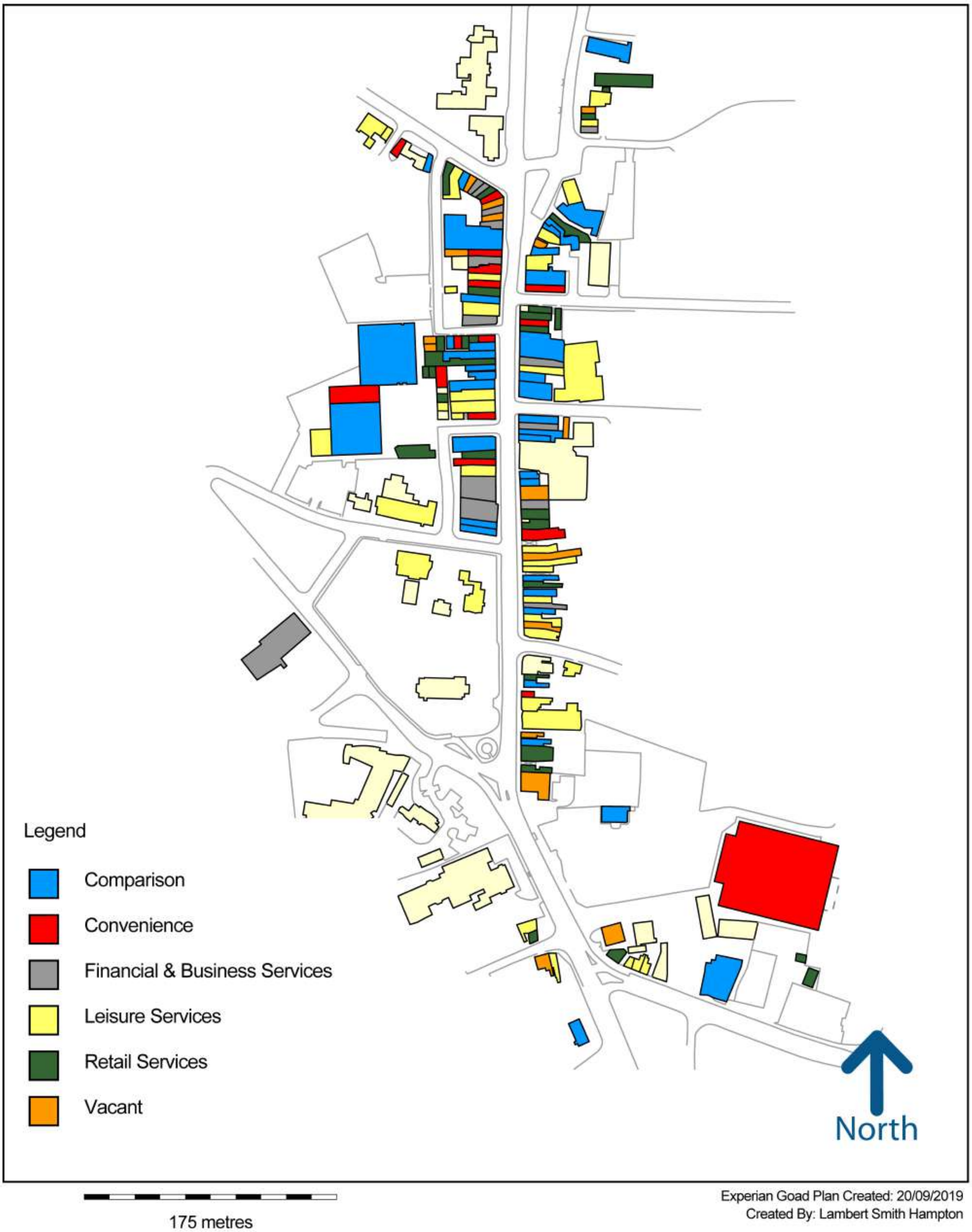
	Centotaph forming its southern gateway, and a number of historic buildings, However, an enhanced public realm is required to pull these elements together, better celebrate the centre and improve the pedestrian environment. At present environmental quality is detracting from the appeal of the centre. There are some attractive shop units but the majority of the accommodation consists of utilitarian post-war units. Many units are in need of refurbishment and shopfront quality is often poor. The Wilko/Home Bargains/Iceland development represents some new, purpose built accommodation of higher quality. There is no real overarching distinctive townscape character discernible in the centre.
CONCLUSION	In summary, Bloxwich appears to be continuing to function well as a Town Centre, serving a broad range of roles for its local population, including a good range of retail and community uses. Whilst it has been subject to the common wider trends in retailing it has maintained its sizes and kept a vacancy rate not far from the national average. It has benefited from recent investment in the market square and adjacent large new retail units. There are some structural issues that could be improved with the Town Centre. Whilst it is highly accessible by bus and car, the heavy traffic and narrow, cluttered pavements detract from the pedestrian experience and useability of the centre. The public realm and built environment is generally in need of enhancement throughout. Asda, although on the egde-of-centre, is poorly connected for pedestrians and is not anchoring the centre as it should be. The parking strategy, both here and elsewhre, could be better planned to encourage more linked trips and longer dwell times. It is likely that the centre will continue to fulfil its role meeting needs for the local community, however the above issues should be addressed before further deterioration ensues or the desirability of the centre is affected when competing centres improve.
KEY ISSUES/SWOT	• Good range of uses, good national operator representation, maintaining size of retail core well; • Excellent range of community uses; • Good accessibility by bus; • Walking distance to large catchment; • Poor pedestrian environment/public realm, High Street is dominated by traffic • Improved linkage needed between Asda and High Street; • Car parking could be better planned to serve the retail core and encourage linked trips; • Some strong individual elements of townscape – these should be capitalised upon for stronger sense of place.
RECOMMENDED DESIGNATION	Bloxwich is identified as a Town Centre, which accurately reflects its role in the hierarchy of centres, and this should be maintained. The following could be explored through a tier-two plan review: **Town Centre boundary** –the existing boundary is extensive. This includes many community uses outside the primary shopping area, which is appropriate. However, there may be merit in reducing this in a number of instances. • The boundary extends significantly to the south-east to include the Leisure Centre (Bloxwich Active Living). This is not necessarily required and a more logical boundary could be drawn, such as ending at Pinfold. • Policy BX9 proposed a new rail station location. Plans are long dormant and are not likely to be revived as improved links to the existing station is now the preferred approach. Therefore, the centre boundary could be adjusted to exclude this site. There is housing lying between this site and town centre uses which would be better defined as being outside the centre. **Primary shopping area** – the existing PSA boundary is relatively tightly drawn. And already excludes some retail uses at the northern and southernmost ends of the retail core. This should be maintained.

Lambert Smith Hampton

experian.

Bloxwich

Lambert Smith Hampton



Experian Goad Plan Created: 20/09/2019
Created By: Lambert Smith Hampton

Map data

Copyright and confidentiality Experian, 2019. © Crown copyright and database rights 2019. OS 100019885

For more information on our products and services:
www.experian.co.uk/goad | goad.sales@uk.experian.com | 0845 601 6011

Lambert Smith Hampton

Appendix 19: LPA: Walsall: Centre – Brownhills

BROWNHILLS TOWN CENTRE

ADDRESS (and Zone)	High Street, Brownhills
DESCRIPTION	Brownhills is a typical linear high street with commercial units on either side of High Street spanning approximately 600m from end to end.
CURRENT STATUS	Town Centre

PHOTOGRAPHS:

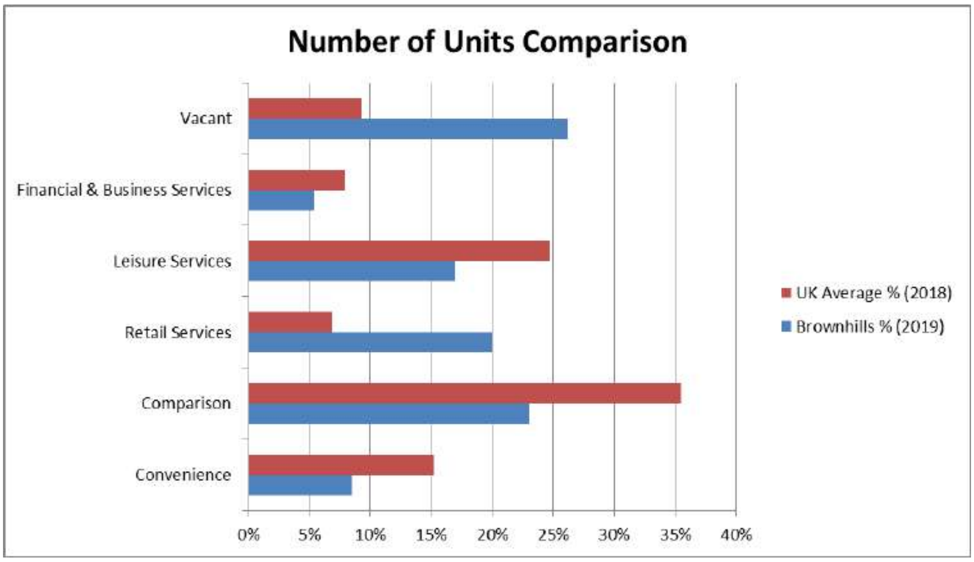
High Street (view north west)

High Street (view south east)

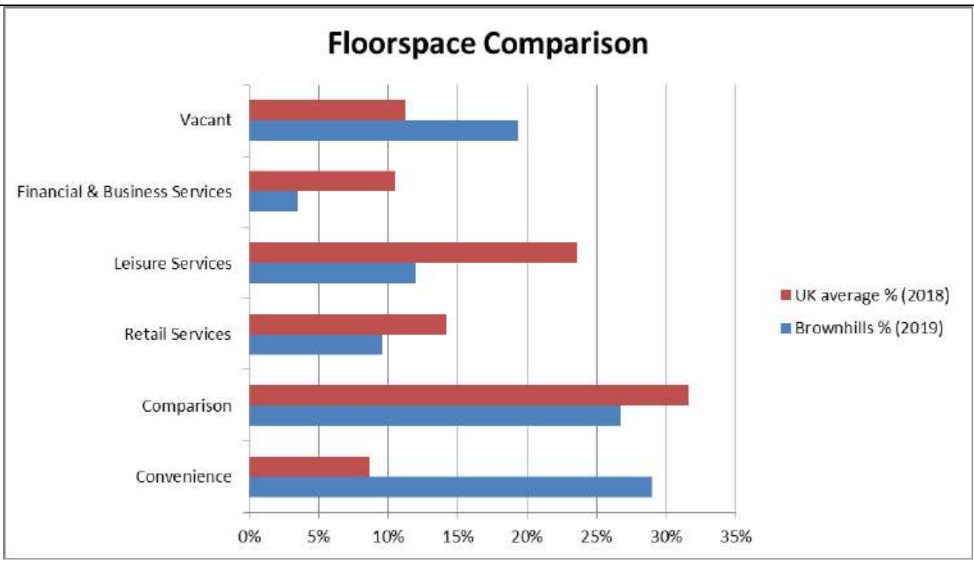
DIVERSITY OF USES	No.	Floor Space (sq.m)	COMMUNITY FACILITIES	TOTAL: 11
Convenience	11	7,740	• Brownhills Community Centre • Holland Park Surgery • St James Primary School • St James Parish Church • Ogley Hay Nursery School • Little Green Dragons Day Nursery • St Bernadette's Roman Catholic Church • Brownhills Methodist Church • Holland Park and Skatepark • Calvary Church • Kingdom Hall of Jehovah's Witnesses	
Comparison	30	7,130	**NATIONAL MULTIPLES**	**TOTAL: 11**
Retail Service	26	2,560	• Tesco • Wilko • Specsavers • Card Factory • Shoe Zone • Boots Opticians	
Leisure Service	22	3,200		
Financial & Business Services	7	920		

Vacant	34	5,160	• Costa • Greggs • Subway • Farmfoods • Aldi • Betfred	
Total No. Of Uses	**130**	**26,710**		

USES	Spatially, Brownhills is a linear high street with predominantly small units (<200 sq.m) lining either side of High Street; a number of larger units break the linear nature of the south western side of High Street. Uses are generally evenly located throughout the centre, though the preponderance of vacancies are located at Ravens Court and Silver Court. Brownhills has a total of 130 commercial units with a total floorspace of 26,710 sq.m; this is compared to 136 units (-6 difference) and 27,025 sq.m (-315 sq.m difference) in 2009[1], revealing a slight decline in the centre's size in the preceding ten years. Comparison goods units make up 23% of the centre's units, 12% below the UK national average of 36%, but not unusual for a centre of this size. When comparing floorspace, comparison goods make up 27% of the centre's total, 5% below the national average. The number of these units and floorspace has decreased by 7 and -339 sq.m (respectively) since 2009. Convenience goods account for only 8% of Brownhills' commercial units, which is 7% below the national average; however, the floorspace of these units makes up 29% of the centre's total (20% above the national average). This over-representation of convenience goods can mostly be attributed to the relatively large 1,290 sq.m Tesco which represents 39% of all convenience floorspace in the centre. Convenience goods have decreased in both number of units and floorspace by 6 units and 575 sq.m since 2009.



[1] Black Country Centres Study – 2009



	The floorspace level of retail services fall 4% below the national average at 10% compared to 14%. In terms of the number of units, retail services are 13% higher than the national average of 7%. This shows that there is a high volume of small floorplate retail service units, typical for this size of Town Centre. Leisure services are under-represented in terms of both number of units and floorspace falling 10% and 14% below the national average respectively. What leisure services there are, are heavily focused towards takeaways which make up 65% of all leisure services. Financial & business services align to national average for number of units, but fall 6% below average for floorspace. Collectively, the service industry has increased by 21 units and 346 sq.m since 2009. Of the 20 leisure services 50% are take-aways; only one restaurant is present in the centre. Brownhill's vacancy levels are very high at 26% (total number of units). This is 17% above average in terms of number, and 8% above average in floorspace. Brownhills suffers from one of the worst vacancy rates in the Black Country. This is a problem that has worsened significantly in the last decade. Vacancies have increased from 21 in 2009 to 34 in 2019, with the floorspace increasing from 3,270 sq.m in 2009 to 5,160 sq.m. Much of this can be explained by the concentration of vacancies at the wholly vacant Ravens Court, which alone accounts for 54% of vacancies and 44% of the floorspace. The centre features a good range of community uses with several churches, a medical centre, community centre and primary school. National multiples are also well represented for the size of the centre; these tend to be located towards the north western end of High Street.
PEDESTRIAN FLOWS	Brownhills was visited mid-afternoon, mid-week in August 2019; The centre was busy with vehicle through traffic, as would be expected given the A-road status of High Street. In regards to pedestrians the area was not busy though people were present throughout the centre. The busiest observed area for pedestrians was the area south east of Ravens Court and north west of Kwik Fit, the latter of which forms a break in the linear high street that likely affects pedestrian flow. The south eastern end of High Street was one of the quietest areas observed for pedestrians, which correlates with the vacancies at Silver Court. Silver Court itself is set back from the main road and separated from the main high street, broken up by the car park of farm foods and Silver Street. The vacant Ravens Court was predictably quiet though surprisingly a number of people were still using the seating in the derelict precinct.
ACCESSIBILITY	The main road running through Brownhills (A452) provides easy access to the centre for vehicular traffic. At least seven bus services operate from multiple stops in the centre, providing transport links to many areas including Birmingham, Walsall, and Lichfield.

Lambert Smith Hampton

<table>
<tr><td></td><td>The following comprise parking within the centre, which is particularly plentiful and free:

c.435 spaces Tesco – Free
c.136 spaces B&M – Free
c.122 spaces Church Road (A & B) – Free
c.67 spaces Aldi – Free
c.54 spaces Farm Foods – Free
c.43 spaces Short Street – Free
c.31 spaces Silver Court – Free
Various on street parking – generally two hours free
</td></tr>
<tr><td>PERCEPTION OF SAFETY</td><td>The high level of natural surveillance provided by the commercial units along much of the length of High Street, combined with the significant levels of vehicular traffic, make the area feel generally safe during the day. Gaps in the continuity of commercial units such as the area immediately surrounding Kwik Fit detract from the feeling of safety, especially the >40m stretch of vacant land to the south of the garage. Kwik Fit's awkward position also negatively impacts the pedestrian connection between the Tesco and the High Street which has very little natural surveillance and no linking commercial uses.

The vacant and derelict Ravens Court presents itself as one of the least safe areas of the centre despite a number of people utilising the seating areas. This enclosed space has no natural surveillance or CCTV cameras and consists of smashed and boarded up windows, graffitied walls, and a damaged and derelict appearance. These environmental qualities combine to make the area feel unsafe during the day and likely far worse at night. Anecdotal evidence suggests the area has become a focus for anti-social behaviour[2].

Though minor in comparison, the vacancies at Silver Court and the area's separation from the main high street can make it feel less safe than the rest of the centre.</td></tr>
<tr><td>ENVIRONMENTAL QUALITY</td><td>Brownhills' environmental quality is similar to other nearby Town Centres, though is let down significantly by Ravens Court precinct. A large proportion of the buildings at the centre of High Street, including Ravens Court are 1970s structures, many of which are in need of some modernisation. Generally most frontages are well kept with the exceptions of Ravens Court and Silver Court. The new Costa at the centre of High Street is a good example of refurbishing a tired 70s structure, making it appear more modern without significant alterations.


Ravens Court (view south west)


Silver Street (view north)

Whilst a few areas of seating are provided, this provision appears insufficient; this is highlighted by the number of people who were still utilising the seating in Ravens Court, despite the unpleasant surrounding environment. There are a number of open spaces where more street furniture would be beneficial, including the access between High Street and Tesco, and the access between Short Street and High Street.</td></tr>
</table>

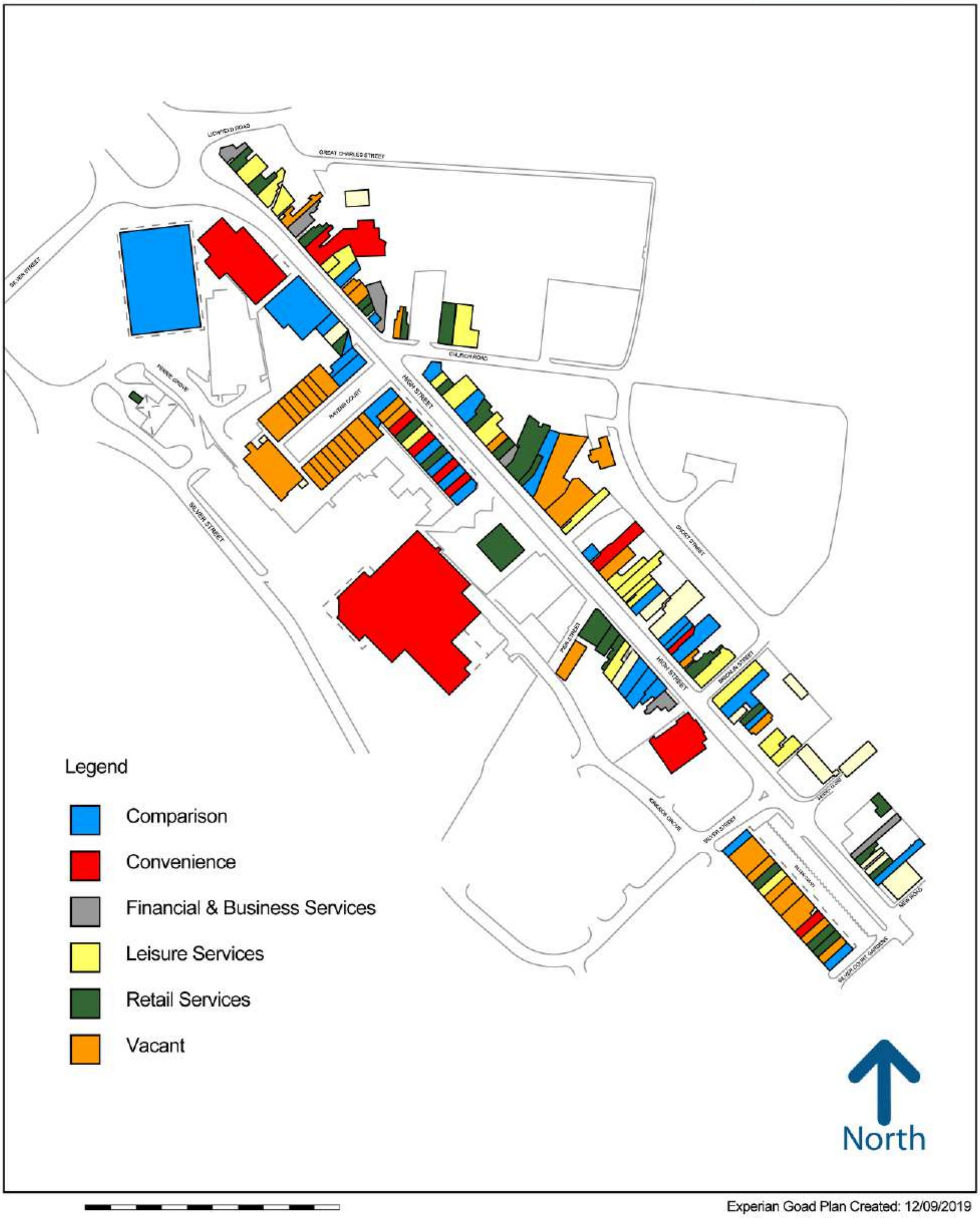
[2] Birmingham Live 2018

	It is understood that there are plans to address Ravens Court by redeveloping the site, though as of 2019 no development has been undertaken. High levels of vehicle traffic are a detracting factor for the area; this is somewhat mitigated by wide pavements and bollards towards the centre of High Street, providing a greater separation for pedestrians.
CONCLUSION	Brownhills commercial uses are weighted towards convenience goods though support a healthy comparison goods range when compared to similar centres nearby. The majority of uses have increased their floorspace since 2009 with the exception of comparison goods which have decreased by 2,056 sq.m. A positive factor of Brownhills is the low level of vacancies which are below the national average and its strong anchor stores of Tesco, Aldi, and Farm Foods. Physically, the centre is performing reasonably well, though a number of commercial units would benefit from the refurbishment and modernisation of their frontages. Additionally, the area would benefit from some investment in street furniture and the general public realm. There are a number of breaks in the centre's linear high street form that could be addressed. A long term plan should be the removal of the Kwik Fit garage and the redevelopment of this and the site to the south. In the short term, the site immediately south of Kwik Fit should be promoted for development. The issue of Ravens Court needs to be addressed as a matter of urgency as it is a significant detracting factor to Brownhills. Brownhills continues to provide a good range of commercial uses and community facilities and though in need of some re-development in areas, the centre appears to be performing well and is considered vital and viable.

KEY ISSUES/SWOT	• **Strengths**
	  ○ Comparatively high comparison goods;
	• **Weaknesses**
	  ○ Derelict Ravens Court;
	  ○ Breaks in high street form (Kwik Fit etc.);
	  ○ Poor quality and separation of Silver Court;
	  ○ High level of vacancies.
	• **Opportunities**
	  ○ Develop Ravens Court to provide a commercial and public space;
	  ○ Develop Kwik Fit site and site to the immediate south;
	  ○ Encourage the improvement of shop frontages;
	  ○ Improve seating and general street furniture.
	• **Threats**
	  ○ Lack of development of Ravens Court further negatively impacts the centre.

RECOMMENDED DESIGNATION	The following could be explored through a tier-two plan review: **Town Centre Boundary** • Given the peripheral location and high level of vacancies at Silver Court, it is suggested that the southern end of the Town Centre boundary ends before silver street, meaning that Silver Court would be an edge of centre location. • The land between Piers Street and Kirkside Grove could also be removed from the centre as this is predominantly low density housing. • Finally, the area south west of B&M could be removed, as this is likewise low density housing. **Primary Shopping Area** The existing Primary Shopping Area currently reflects the existing centre boundary and should be adjusted in line with the suggested changes to the centre boundary.

Brownhills



150 metres

Experian Goad Plan Created: 12/09/2019
Created By: Lambert Smith Hampton

Copyright and confidentiality Experian, 2019. © Crown copyright and database rights 2019. OS 100019885

For more information on our products and services:
www.experian.co.uk/goad | goad.sales@uk.experian.com | 0845 601 6011

Appendix 20: LPA: Walsall: Centre – Aldridge

Lambert Smith Hampton

ALDRIDGE TOWN CENTRE

ADDRESS (and Zone)	Aldridge Town Centre
DESCRIPTION	The Town Centre is focused on the dated Aldridge Shopping Centre, with other key areas being Anchor Road and High Street. The Town Centre is almost entirely contained within the bounds of Little Ashton Road (north), Aldridge Croft (east) Portland Road (south), and the Aldridge Bypass (west).
CURRENT STATUS	Town Centre

PHOTOGRAPHS:

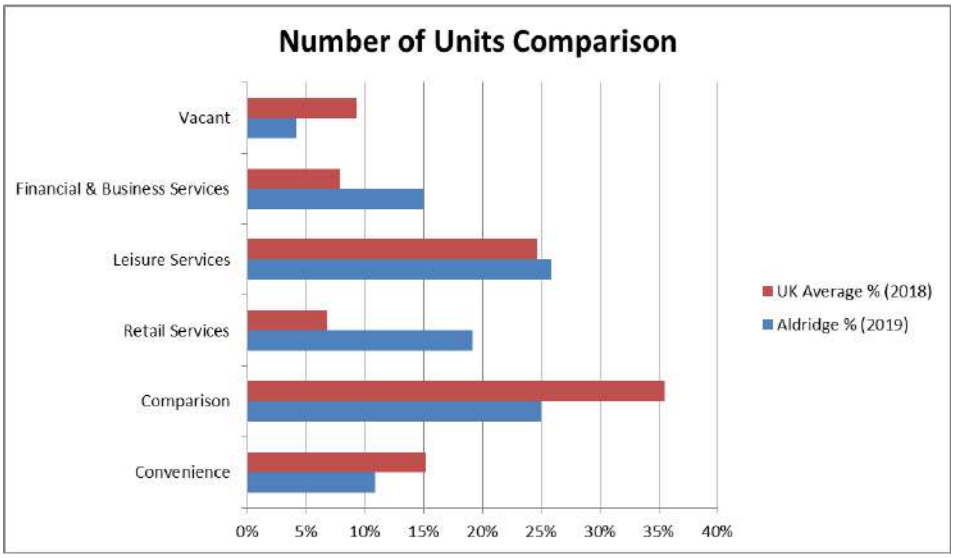
The Square – Aldridge Shopping Centre (view east)

Anchor Road (view north)

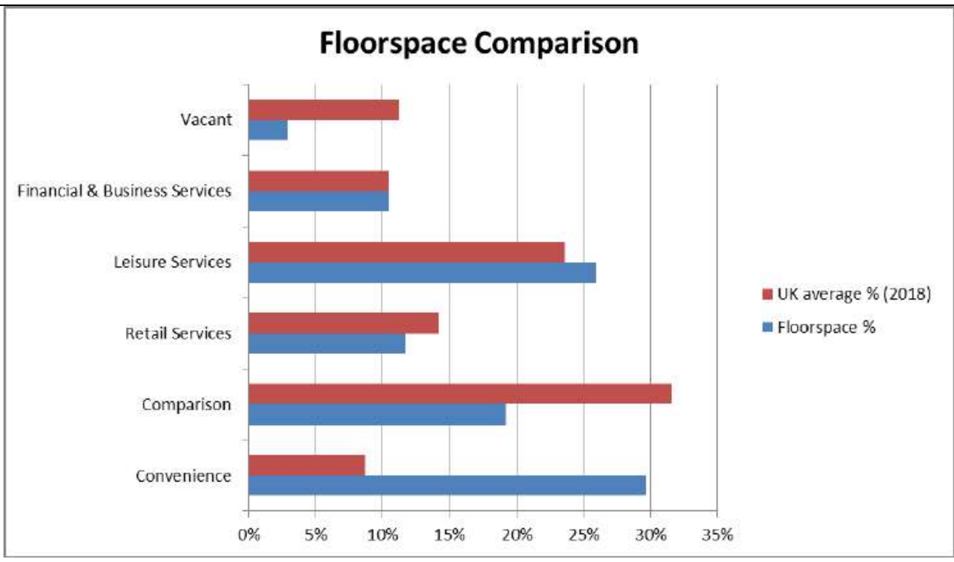
DIVERSITY OF USES	**No.**	**Floor Space (sq.m)**	**COMMUNITY FACILITIES**	**TOTAL: 11**
Convenience	13	6,310	• Aldridge Croft (park) • Aldridge Library • Aldridge Community Centre • Youth Services • Aldridge Police Station • Aldridge Methodist Church • Aldridge Parish Church • Anchor Road Dental Practice • Cooper & Jordan C of E School • Northgate Practice • Post Office	
Comparison	30	4,080	**NATIONAL MULTIPLES**	**TOTAL: 20**
Retail Service	23	2,490	• WHSmith • Costa • Dominos • Morrisons • NatWest • Lloyds Bank • HSBC • TSB Bank	
Leisure Service	31	5,510		
Financial & Business Services	18	2,230		
Vacant	5	620		

Total No. Of Uses	**120**	**21,240**	• J D Weatherspoon • Papa John's • Iceland • Home Bargains • Boots • Co-operative Travel • Thomas Cook • Bet Fred • Ladbrokes • Oxfam Charity Shop • Card Factory • Greggs • Subway	

USES	The Town Centre has 120 commercial units that provide a range of main town centre uses[1]. In comparison to the national average[2] there is an under-representation of convenience goods units (11% compared to 15%) and an under-representation of comparison goods units (25% compared to 36%), though this is not unusual for a town centre of this size. When comparing the levels of floorspace it can be seen that although there may be few convenience goods stores they make up a sizeable percentage of Aldridge's floorspace at 30% which is significantly higher than the 9% national average. This is due to the large floorplates of Morrisons and Iceland. This difference in number of units and floorspace reverses with Retail Services which are over-represented in terms of number of unit (19% Aldridge – 7% National), yet under- represented in terms of floorspace (12% Aldridge – 14% National).



[1] As defined in National Planning Policy Framework, Annex 2 – Page 68
[2] GOAD, all centres, 2018

	 As seen from the land use map at the end of this section, Aldridge's land use is mixed throughout the centre though possessing a collection of Convenience and Comparison Goods units around 'The Square' in the shopping centre. The centre has a good range of national multiples (multiples), with Morrison's providing a main anchor use, though other large retailers such as Iceland and Home Bargains contribute a large amount of floorspace. The multiples are distributed throughout the centre, with a mixture of takeaways and high street banks making up the majority of multiples outside of the shopping centre. The preponderance of multiples within the shopping centre are focussed on Comparison Goods with some Convenience Goods. Aldridge is in the strong position of having five of the main national banks with Lloyds and Barclays on High Street, TSB and HSBC at the northern end of Anchor Road, and NatWest at the southern end of Anchor Road. A positive highlight of the centre is its low vacancy rate of 4% which is significantly below the national average of 9%. In 2009 Aldridge had a total of 114 units which has now increased to 120. Vacancies have reduced from 10 units to 5, with the floorspace of these almost halving from 1,022 sq.m (2009) to 620 sq.m (2019). The increase in overall units and decrease in vacancies means that Aldridge has reduced its percentage of vacant units from 9% in 2009 to 4% in 2019. Of the 34 commercial units contained within the shopping centre (not including Croft Parade) only 2 are vacant. Given the higher density of units here, the very low level of vacancies highlights the strength of the shopping centre, suggesting it is well managed. With the closure of the Preggo, and Portobello restaurants, High Street now contains four restaurants and a Public House towards Anchor Road. This comprises Aldridge's night time economy which appears reasonable given the size of the town, though a further reduction in evening activity generating uses should be avoided.
PEDESTRIAN FLOWS	The centre was visited late morning on a weekday and was generally quiet, especially outside of the shopping centre. The main roads of High Street and Anchor Road contained only a handful of pedestrians, and though there was not a significant level of traffic, almost all of the on-street parking spaces were occupied. The shopping centre had a much higher concentration of customers, though it was certainly not busy, with less than 10 people seen passing through 'The Square' at any one point. The busiest place observed was Morrisons which had a large amount of people inside, and a number of people passing through its Anchor Road entrance/exit.
ACCESSIBILITY	The Shopping Centre and the various streets leading to and from it benefit from pedestrianisation. High Street features a wide pavement on one side of its one way road providing a good separation from traffic. Anchor Road features wide pavements and a Pelican crossing towards its northern end.

<table>
<tr><td></td><td>
Additionally there are two dropped kerb (not including driveways) pedestrian crossings, one at the southern end of the road, and one linking the Morrisons to the wider shopping centre area. There is a general incoherence from the paving in this area and it is often unclear whether one is walking on a pedestrian pavement, property entrance, or parking area.

Aldridge offers substantial catchment areas to the north and south of the centre, dominated by low density residential properties. These areas are contained by Green Belt land and as such their closest retail and leisure opportunities will almost exclusively fall within this centre.

A large number of bus services pass through Aldridge particularly noticeable on Anchor Road which features four covered bus stands; this helps to supplement the lack of a train station in the town.

The following make up the centre’s parking provision:

c.300 spaces Morrisons – 3 hours free (Morrisons customers only)
c.200 spaces Aldridge shopping Centre – 2 hours free
c.60 spaces Crown Public House – Pay and display
c.253 spaces Other sites – Various

On street parking is generally only available on High Street which features a mix of disabled and regular parking bays along much of its length; these bays are restricted to 2 hours parking between 8am and 6:30pm Monday to Saturday.

Considering the size of Aldridge there is a substantial amount of parking available, much of which is free. It is noted however that the Morrisons car park features a number of signs informing visitors that the parking is only for Morrisons’ customers; this does not promote dwell time in the town, and serves to further detach the supermarket from the retail core.
</td></tr>
<tr><td>PERCEPTION OF SAFETY</td><td>
The centre appears safe, with most areas active and benefiting from natural surveillance, and pedestrian routes generally overlooked. The shopping centre has the added benefit of CCTV cameras positioned at various points.

With the restaurants and one Public House all being located along High Street, it can be assumed that there would be little to no evening activity taking place in ‘The Square’. In the evening this lack of natural surveillance and separation from passing traffic could potentially lead to anti-social behaviour. However, this is likely to be dissuaded by the CCTV cameras.
</td></tr>
<tr><td>ENVIRONMENTAL QUALITY</td><td>
Though the Shopping Centre is visually dated due to its 1970s precinct style, its public realm however is of a moderate to high quality, incorporating well maintained plants and street furniture at the centre’s core. The shop frontages throughout the town are in an overall good and modern condition, contrasted slightly by the 70s style shopping centre. These observations are mirrored in the 2009 centres’ study which also noted the planting and street furniture which contributes to a ‘more attractive environment’ off-set against the ‘out-dated’ shopping centre.


The Square (view east)

Anchor Road (view south)

In terms of character, the local area is dominated by the early 70s style of the shopping centre which continues through to High Street and an eastern section of Anchor Road. Buildings along the western
</td></tr>
</table>

	side of Anchor Road are predominantly comprised of commercial units, converted from early to mid-20th century houses. The Morrisons entrance onto Anchor Road effectively matches the style of these converted residential dwellings without imposing a typical large supermarket aesthetic. The condition of the paving along Anchor Road is poor though improves towards the Anchor Parade. 'The Square' appears to serve the purpose of the town's core offer and benefits from access in all directions, importantly providing a link with Aldridge Croft and the wider town. There are no listed buildings within the boundary of the Town Centre or conservation areas; the nearest listed building is the Grade II Manor House used as a Youth Services centre. The environmental quality in Aldridge appears to have retained a similar standard to that reported in the 2009 Centres Study.
CONCLUSION	Aldridge continues to retain very low vacancy levels and a good mix of all retail and leisure uses. Whilst there are only 13 Convenience Goods units within the centre, the floorspace of these make up a sizeable percentage of Aldridge's retail profile at almost 3.5 times the national average (30% compared to 9%). In addition to a wide range of main town centre uses there are a reasonable number of community facilities that support the Town Centre which help to contribute to the overall function and performance of the area. The shopping centre is of a moderate quality though would benefit significantly from a redevelopment of the physical structure to modernise its 70's style. Likewise, the paving and layout of Anchor Road requires attention and repair/maintenance. The significant level of free parking and large number of bus services make Aldridge highly accessible with all modes of transport. Aldridge is performing well in relation to its size, and provides vital services for local residents and visitors and has strong signs of vitality and viability.
KEY ISSUES/SWOT	• **Strengths** o Good range of uses, good national multiple representation, maintaining size of retail core well; o Low number of vacancies which have reduced since 2009; o Very accessible by bus; o Strong Convenience anchor in Morrisons; o Strong Retail Service sector; o Well maintained plants and street furniture in 'The Square'. • **Weaknesses** o Physically dated shopping centre; o Some poor pedestrian areas in secondary locations. • **Opportunities** o Encourage more evening activity uses to enhance the evening economy; o Improve the façade of Aldridge Shopping Centre. • **Threats** o Further reduction in Comparison Goods retail could negatively impact the vitality and viability of the centre.
RECOMMENDED DESIGNATION	Aldridge is identified as a Town Centre, which accurately reflects its role in the hierarchy of centres, and this should be maintained. **Town Centre Boundary** The existing centre boundary should be altered to remove the area to the north around Northgate road which includes Homebell House and the Royal Mail Group. The boundary should also be amended around the Health Centre to the south depending on future plans at the railway lines.

	Primary shopping area It appears that the Primary shopping area has not been updated since the 2005 Walsall UDP which included the shopping centre, High Street, and Anchor Road to the entrance of Morrisons. It is advised that this is extended to include Morrisons (currently only includes the entrance).

Lambert Smith Hampton

Appendix 21: LPA: Walsall: Centre – Willenhall

WILLENHALL TOWN CENTRE

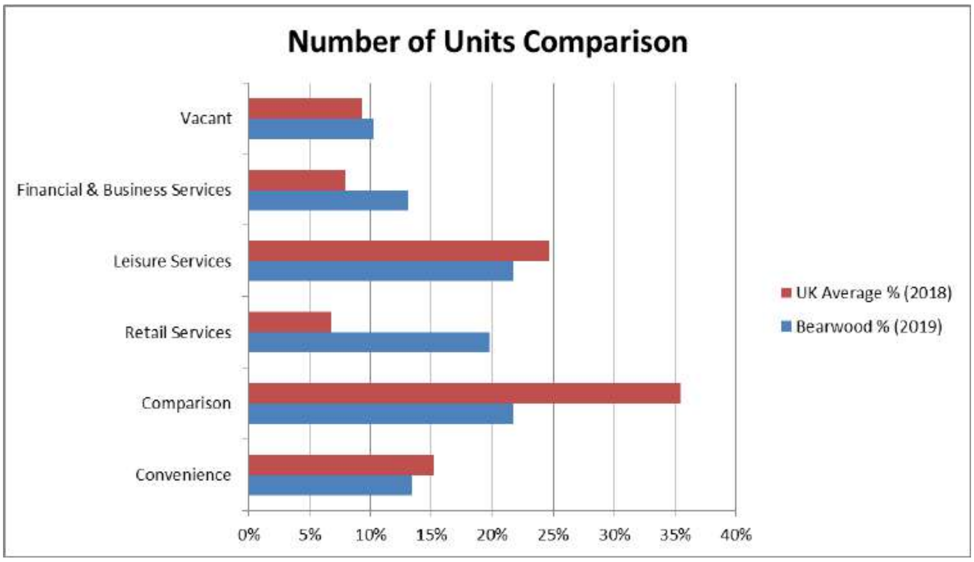
ADDRESS (and Zone)	Willenhall
DESCRIPTION	Willenhall Town Centre is centred on Market Place with commercial units expanding in all directions, covering a number of streets including New Road, Wolverhampton Street, Stafford Street, and more.
CURRENT STATUS	Town Centre

PHOTOGRAPHS:

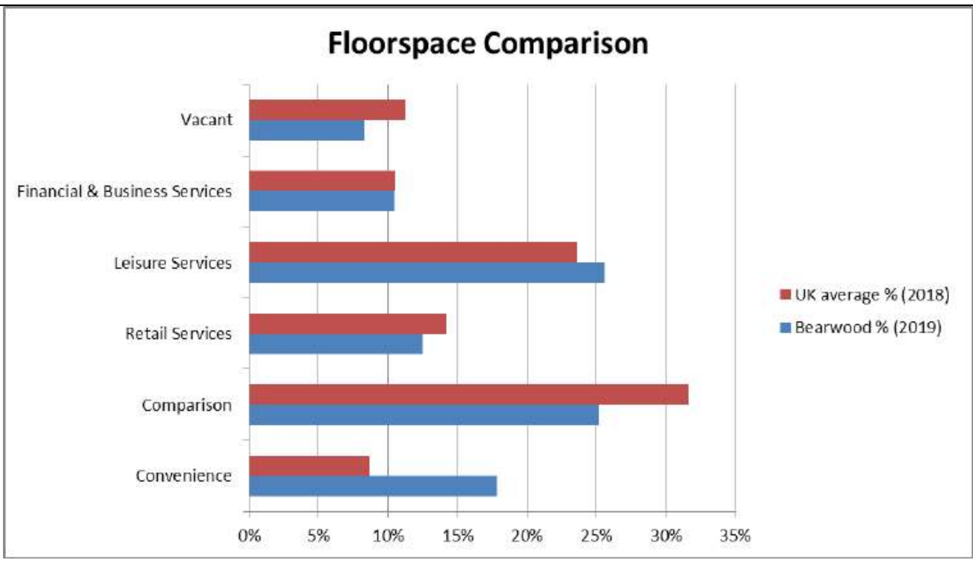
Market Place (view east)


Stafford Street (view north)

DIVERSITY OF USES	**No.**	**Floor Space (sq.m)**	**COMMUNITY FACILITIES**	**TOTAL: 6**
Convenience	22	6,200	• St Giles C Of E Primary School • Willenhall Library • Willenhall Chart Community Hub • Providence Chapel • St Stevens Church • New Testament Church of God	
Comparison	52	7,740	**NATIONAL MULTIPLES**	**TOTAL: 13**
Retail Service	31	2,780	• Boots • Morrisons • Lidl • Ladbrokes • Co-operative Funeralcare • William Hill • Betfred • Heron Foods • Greggs • Domino`s • Lloyds Bank • Poundland • Superdrug	
Leisure Service	31	5,190		
Financial & Business Services	17	3,370		
Vacant	26	4,070		
Total No. Of Uses	**179**	**29,350**		

USES	Willenhall has a total of 179 commercial units with a total floorspace of 29,350 sq.m; this has decreased by two units but increased by 2,288 sq.m (previously 27,062 sq.m) since 2009[1], suggesting a alight overall growth in the centre in the last ten years, which is positive. Comparison goods units make up 29% of the centre's units, 6% below the UK national average[2] of 36%. When comparing floorspace, comparison goods currently make up 26% of the centre's total, 5% below the national average. Despite falling below the national average, when compared to other similar centres in the Black Country, Willenhall has a much stronger comparison goods share. The number of these units and floorspace has increased by 29 and 1,153 sq.m (respectively) since 2009. The recent trend is for a decrease in this sector and so this significant increase is notable and surprising. It is indicative of a healthy centre. Comparison units here include household goods, discounters, electrical goods and charity shops (6 of the units). They are mostly independents rather than national multiples. Convenience goods account for 12% of Willenhall's commercial units, which is 3% below the national average; however, the floorspace of these units makes up 21% of the centre's total (12% above the national average). Typically convenience goods floorspace figures in this type of centre are inflated above average due to a (or a few) large floorplate supermarket(s). This is the same case here, where Morrisons' 3,330 sq.m floorspace makes up 54% of the total convenience floorspace. Despite the slight over-representation, when compared to other Town Centres in the Black Country, Willenhall's convenience floorspace is far more balanced with its comparison goods floorspace. Since 2009 convenience goods units have decreased by 24 units but increased by 1,722 sq.m; the loss of a large number of units but overall increase in floorspace is due to the development of the Morrisons. 

[1] Black Country Centres Study – 2009
[2] GOAD, all centres, 2018

	 The floorspace level of retail services fall 5% below the national average at 9% compared to 14%. In terms of the number of units, retail services are 11% higher than the national average of 7%. This shows that there is a high volume of small floorplate retail service units, typical for this size of centre. Leisure services fall 7% below the UK average with regards to the number of units (17% of total), and fall 6% below average in terms of floorspace (18% of total). Despite these low levels, there is a very good range of leisure services which include a variety of cafes, takeaways, public houses, restaurants, and community facilities. This is a much better range than most Town Centres in the Black Country which tend to have a clear majority of takeaways. The vacancy rate is 15%. Vacancy levels are 5% above average in terms of number (26 units), and 3% above average in floorspace (4,070 sq.m). This level of vacancies is higher than many of Town Centres in the Black Country, although only a little above the nationl average. Market Place has a high density of comparison goods compared to the wider centre; convenience goods are also concentrated around here. All other uses are more widely distributed throughout the centre. Willenhall features a fair range of community uses which include several churches, a museuem, a library, and a community hub. These community uses are more diverse than other simialr centres in the Black Country. There are 13 national multiples sittuated within the centre, which include a varied range of uses. When the centre was last assessed in 2009 it was noted that there were “few multiple retailers present”.
PEDESTRIAN FLOWS	The centre was visited mid-afternoon on a Friday in September 2019. High levels of footfall was observed at Morrisons, which diminished with distance from the store. Market Place had a fair amount of people present, although most were passing through or using the ATM; the market was operating here but not attracting much trade. Despite this, there were enough people circulating to make the area feel like it was actively utilised. The Willenhall Market operates Wednesday, Friday and Saturday 09:00-16:00, during which the majority of Market Place is closed to traffic. The pedestrianisation of Market Place allowed people to flow more freely through the centre. The market appeared very quiet and most pedestrians were passing it by. Outside of Market Place the centre had very low levels of footfall, with some streets such as Cheapside and Upper Lichfield Street completely devoid of people at the time of the visit. Though very busy with vehicles, the area of New Road around Lidl also lacked pedestrian activity. Similarly to Morrisons, Lidl lacks any significant surrounding commercial uses that would link it well to the town

	centre.
ACCESSIBILITY	Willenhall is not as well connected in terms of bus services as Bilston and Wednesfield, with fewer high frequency services. New Road provides a number of stops and services to areas such as Walsall and Wolverhampton, although the wider centre has a far more limited number. No bus stops were noted in the vicinity of Morrisons, with the closest one appearing to be located almost 200m away on Upper Lichfield Street (although not far this is a key node for bus travel and people with heavy shopping will not want to walk far). A lack of closer bus stops around Morrisons will significantly deter people from utilising public transport to shop here. No bus stops or services are present through Market Place or the majority of the connecting streets. Public transport users are therefore primarily limited to the stops along New Road. The following comprise parking within the centre which is considered to be plentiful for the centre: • c.580 spaces Morrisons – Free to customers • c.130 spaces Poundland – Free • c.75 spaces Lidl – Free • c.70 spaces Wolverhampton Street North – Free • c.50 spaces Wolverhampton Street South – Free • c.32 spaces Gomer Street – Free
PERCEPTION OF SAFETY	Willenhall felt generally safe, although areas with minimal pedestrians and lacking commercial units did lessen the perception of safety. The centre is surrounded by a large area of industrial uses. Where Town Centre units are vacant, often, combined with many run down and derelict buildings, this has a significant negative impact on both the appearance of the area, and the perception of safety. There are no evening activity generating uses located at the core of the centre (Market Place); this may encourage antisocial behaviour and crime once the majority of commercial uses have closed for the day.
ENVIRONMENTAL QUALITY	Willenhall has a distinctive, historic environment, with most of the Town Centre falling within a Conservation Area, and 11 listed buildings being present. This provides the area with a multitude of architecturally interesting and attractive buildings and the basis for a distinctive experience. However, this potential is not fully realised, with the environmental quality generally being in need of improvement. There is a preponderance of poor quality commercial frontages, many in need of significant repair, exacerbated by vacancies. The area would benefit significantly from improvements in the physical environment, specifically targeting poor quality frontages. There had been a Townscape Heritage Initiative here around 10 years ago but unfortunately many of the frontages improved have since deteriorated.  Market Place (view north)  Upper Lichfield Street (view north) It is understood that within the past two years new paving and road surface has been placed along the length of Market Place. Whilst this is an improvement from the former paving there is a significant lack of seating and wider street furniture both here and throughout the centre. There is ample space along Market Place for seating, even when considering the need for market stall spaces.
CONCLUSION	Willenhall's commercial floorspace is fairly balanced between convenience and comparison goods, with the latter making up a clear majority of units in the centre. Vacancies are slightly higher than average both nationally, and have increased in floorspace over the past 10 years, although the

<table>
<tr><td></td><td>comparison goods sector remains surprisingly strong.

The centre benefits from a high level of listed buildings and a distinctive architectural style. However, the poor condition of the majority of shop frontages significantly detracts from the overall character of the area. The area would benefit significantly from improvements in shop frontages.

Whilst the centre is highly accessible by car, bus services are somewhat limited to New Road and do not adequately service the wider centre.

There are several areas of employment uses within and around the centre's boundary, for example between Stafford Street and Gower Street, some of which are vacant. These present a good opportunity for redevelopment and could facilitate mixed use development with a variety of potential uses including residential, community facilities, and other main town centre uses[3]. Some of these would be better removed from the Town Centre boundary and developed solely for residential use (see below).

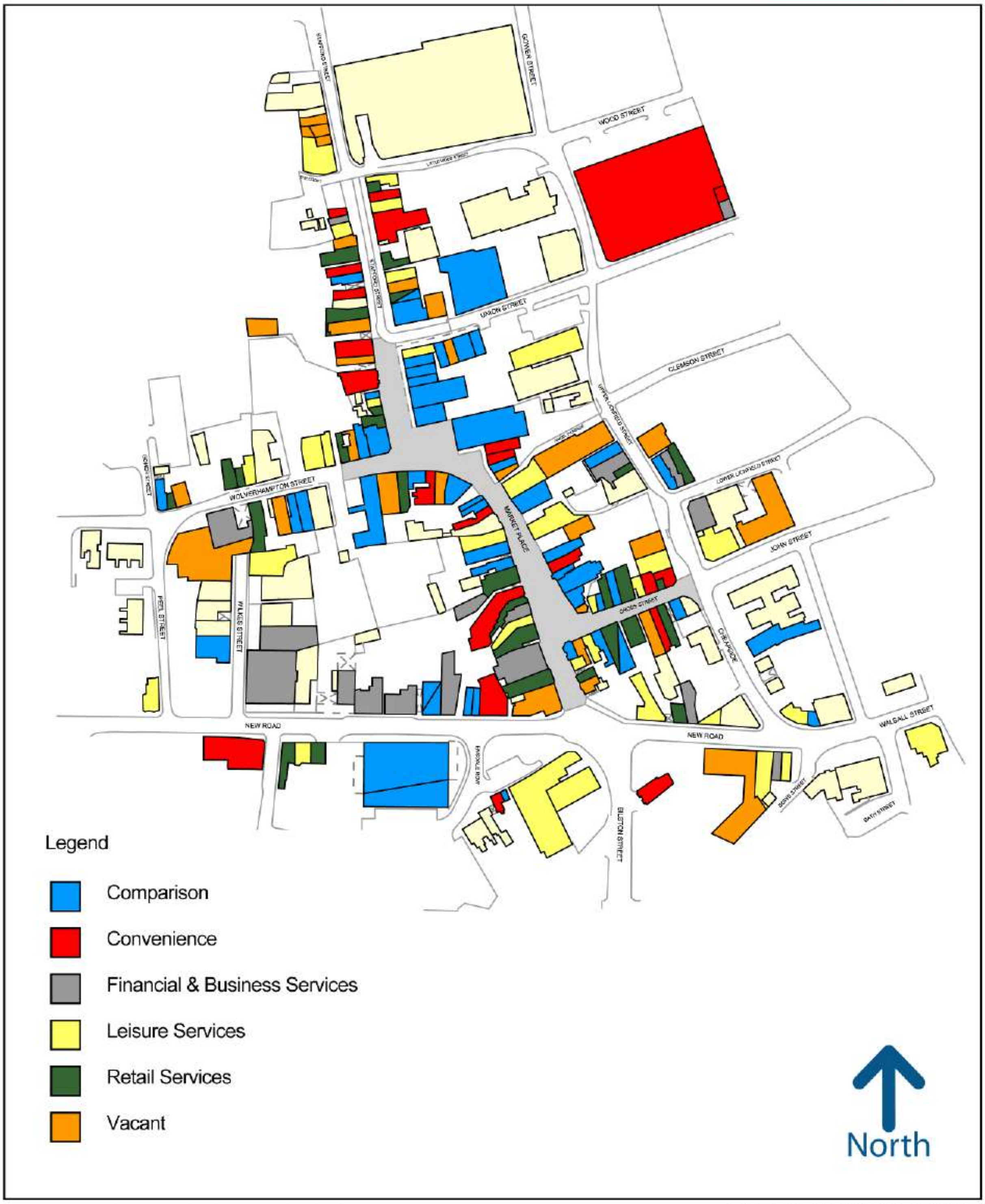
Despite issues with the physical environment, Willenhall appears to be performing adequately as a Town Centre, compared to other centres of comparable size, although it did seem to lack significant levels of footfall. Consequently, the centre is considered vital and viable but is at risk of decline and could its potential could better be maximised through environmental enhancements.</td></tr>
<tr><td>KEY ISSUES/SWOT</td><td>Strengths
High number of listed buildings and a distinctive local character;
High level of parking and very accessible by private vehicle;
Good balance of comparison and convenience goods.
Weaknesses
High level of vacancies;
Poor public transport connectivity;
Potentially low footfall.
Opportunities
Encourage improvement of commercial frontages;
Improved public realm;
Re-develop vacant industrial sites with a mix of uses (not necessarily town centre uses).
Threats
Continued deterioration of commercial frontages;
Continued increase in already high vacancies;
Decline in footfall.</td></tr>
<tr><td>RECOMMENDED DESIGNATION</td><td>The following could be explored through a tier-two plan review:

Town Centre Boundary
The current Town Centre boundary is extensive and covers many areas that have no main town centre uses. Several amendments to the boundary would ensure that the centre retains a high density of commerciality.
North
Remove area north of Little Wood Street (industrial) and Wood Street (residential).
East
Remove Wakes Ground car park;
Remove area contained within Hall Street, John Street, Level Lane, and Walsall Road (industrial/residential);
Remove area east of Morrisons.
South
Retain area south of Poundland car park and The Malthouse (industrial) - connecting to the future key transport link of Willenhall station that, once developed, will facilitate the planned improved pedestrian links to the existing centre;</td></tr>
</table>

[3] As defined in National Planning Policy Framework, Annex 2 – Page 68

	◦ Remove area east of Lidl (industrial); ◦ Keep units directly south of Walsall Street but remove area behind these (industrial). **Primary Shopping Area** If the aforementioned alterations to the Town Centre boundary are implemented then there is less of a need for a Primary Shopping Area [PSA]. However, a PSA is recommended as this would facilitate consolidating a critical mass of retail activity at the core and allowing a more flexible approach to the development of opportunity sites for a mix of uses. It is recommended that a PSA is limited to Market Place, Cross Street, and the southern end of Stafford Street.

Willenhall



130 metres

Experian Goad Plan Created: 03/10/2019
Created By: Lambert Smith Hampton

Copyright and confidentiality Experian, 2019. © Crown copyright and database rights 2019. OS 100019885

For more information on our products and services:
www.experian.co.uk/goad | goad.sales@uk.experian.com | 0845 601 6011

Appendix 22: LPA: Walsall: Centre – Darlaston

Lambert Smith Hampton

DARLASTON TOWN CENTRE

ADDRESS (and Zone)	Darlaston
DESCRIPTION	Darlaston Town Centre is centred upon King Street, expanding in all directions to include the roads of Crescent Road, Church Street, Pinfold, and Walsall Road.
CURRENT STATUS	Town Centre

PHOTOGRAPHS:


King Street (view south)


King Street (view South)

DIVERSITY OF USES	No.	Floor Space (sq.m)
Convenience	7	6,470
Comparison	14	1,950
Retail Service	21	1,500
Leisure Service	20	3,490
Financial & Business Services	8	680
Vacant	11	1,230
Total No. Of Uses	**81**	**15,320**

COMMUNITY FACILITIES	TOTAL: 8
- Darlaston Town Hall - Darlaston Library - Victoria Park - St. Lawrence's Church - Saint Joseph's Roman Catholic Church - Darlaston Health Centre - Darlaston Police Station - Darlaston Children's Centre	

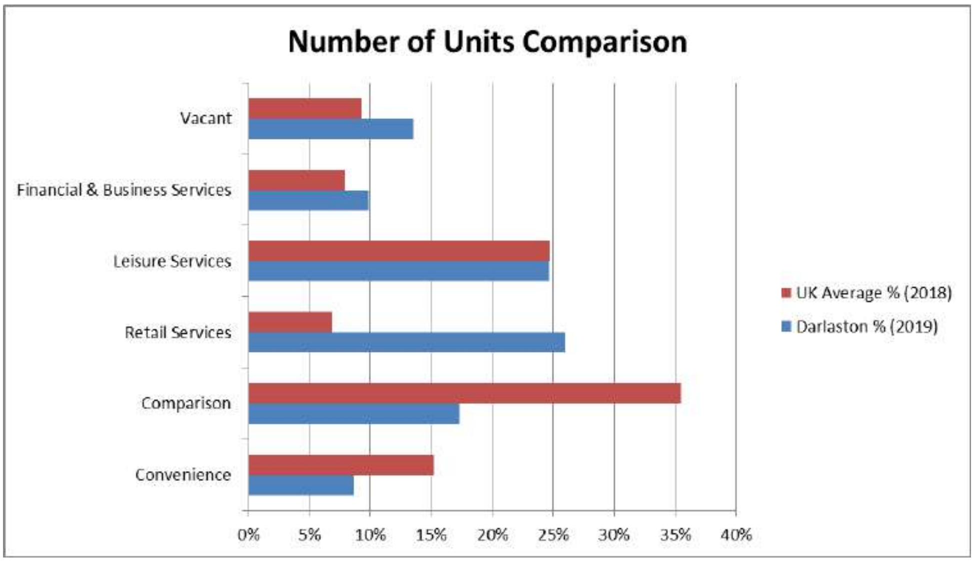
NATIONAL MULTIPLES	TOTAL: 6
- Boots - ASDA - William Hill - Lloyds Bank - Coral - Heron Foods	

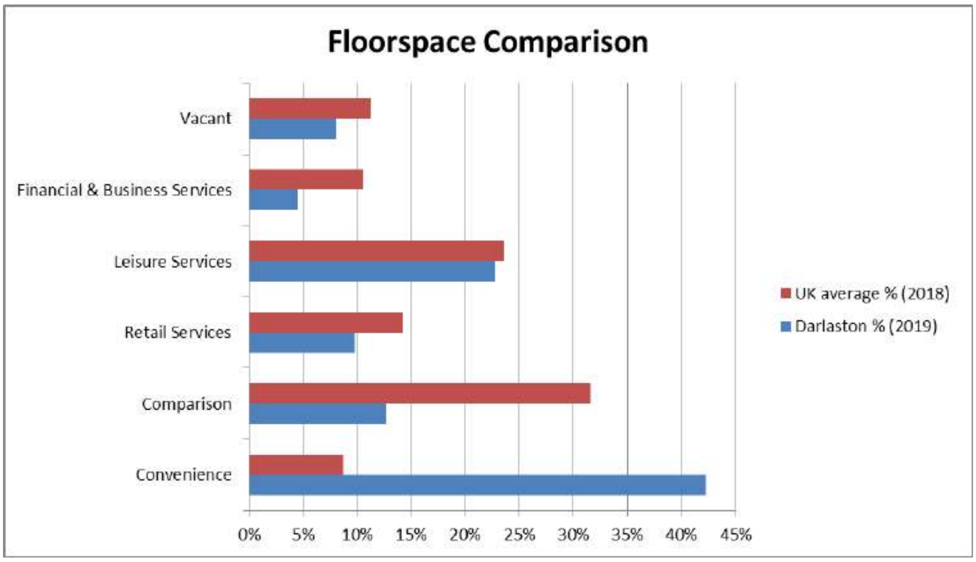
USES

Darlaston has a total of 81 commercial units with a total floorspace of 15,320sq.m; this is compared to 81 units and 15,375 sq.m (-55 sq.m difference) in 2009[1], revealing very little change in the centre in the preceding ten years.

Comparison goods units make up 17% of the centre's units, 18% below the UK national average[2] of 36%, though not unusual for a centre of this size. When comparing floorspace, comparison goods make up 13% of the centre's total, 19% below the national average. The number of these units and floorspace has decreased by 5 and -261 sq.m (respectively) since 2009. This shows there is only a small market for comparison goods in Darlaston, and that has declined since 2009.

Convenience goods account for only 9% of Darlaston's commercial units, which is 6% below the national average; however, the floorspace of these units makes up 42% of the centre's total (34% above the national average). This over-representation of convenience goods can almost entirely be attributed to the large 5,470 sq.m Asda which represents 85% of all convenience floorspace in the centre. Though a large convenience anchor is typical in this type of Town Centre, Asda dominates the convenience market. Convenience goods have decreased in both number of units and floorspace by 6 units and 575 sq.m since 2009.





The floorspace level of retail services falls 4% below the national average at 10% compared to 14%. In terms of the number of units, retail services are 19% higher than the national average of 7%. This

[1] Black Country Centres Study – 2009
[2] GOAD, all centres, 2018

	shows that there is a high volume of small floorplate retail service units, typical for this size of Town Centre. Leisure services align excactly with the national average in regards to the number of units (25% of total), and falls only 1% below average in terms of floorspace (23% of total). 45% of leisure uses are takeaways, though 20% (4 no.) are restaurants and pubs. 14% of units in Darlastaston are vacant. Vacancy levels are 4% above national average in terms of number, and 3% below average in floorspace. This represents a relatively good position when compared to similar centres in The Black Country. These vacancies are concentrated towards Pinfold. King Street is clearly Darlaston's primary retail area, with the largest amount of convenience and comparison stores located along its eastern side and Asda occupying virtually all of its eastern side. The southern ends of Pinfold and Walsall Road feature a variety of uses, whilst Church Street only contains a handfull of commerical units. When considering the small size of Darlaston, the centre features a fair range of community uses with several churches, a medical centre,a library and a town hall. National multiples are also well represented for the size of the centre; these are located on King Street.
PEDESTRIAN FLOWS	Darlaston was visited late morning, on a Friday in September 2019. The centre was very busy with vehicle traffic especially at the Asda store; pedestrian numbers however were quite low. Very few pedestrians in total were seen along Pinfold, Walsall Road, and Darlaston Road. Only a handful of pedestrians were seen along Church Street which is unsurprising given the lack of commercial units. The Asda site was busy with both vehicles and pedestrians. The busiest pedestrian area away from Asda was King Street, though this was still relatively quiet. The current centre boundary is extensive with a number of areas included that have little to no commercial uses and even fewer uses connection to the Town Centre. This has the effect of making the entire centre seem particularly dispersed, and quieter than it was in reality.
ACCESSIBILITY	Asda connects well to King Street, helping to promoting pedestrian through traffic from the anchor store. The bus interchange located on St Lawrence Way links to Asda car park which can provide a shortcut to the main Town Centre. King Street is restricted to vehicles from Monday to Saturday 10am – 4pm which helps to make the area more accessible for pedestrians. Darlaston bus interchange provides multiple bus services across The Black Country including Birmingham, Walsall, Wolverhampton and West Bromwich. The following comprise parking within the centre which seems adequate for the size of Darlaston: • c.350 spaces Asda - Free • c.150 spaces Darlaston Health Centre – Free • c.43 spaces Picturedrome Way – Pay and display • c.15 spaces crescent road – Short stay free
PERCEPTION OF SAFETY	On the whole Darlaston felt safe though there were many areas that lacked a pedestrian presence or natural surveillance from commercial units, both lowering the perception of safety. Though the commercial units along the length of, and at the junction of, the A4038 and A462 are physically poor the high levels of vehicle traffic provide a perception of safety due to the surveillance they provide. Given that there was not significant footfall during the day, it can only be assumed that this would decrease further, given the limited range of evening activity generating uses.
ENVIRONMENTAL QUALITY	The environmental quality of Darlaston varies significantly throughout the centre. Generally, the commercial units along King Street and Church Street are of a much better quality than elsewhere. This higher quality is specifically apparent at the northern end of King Street where there are several Grade II listed buildings, all within the Darlaston conservation area. Despite two of these listed

buildings being vacant, they are in very good condition and are a great asset for the centre. The centre features six Grade II listed buildings, including a church, memorial, and four buildings.

The commercial units situated along Pinfold, Walsall Road, and Darlaston Road generally have very poor quality frontages that are damaged and dated. The entire centre would benefit if these frontages were repaired/replaced and well maintained.


Church Street (view west)


St Lawrence Way (view south east)

From a design perspective the majority of the buildings work well within the historic context. An exception to this however is the 1960s style building at the very south western end of King Street which currently contains an opticians and a dental surgery, and of course the Asda store, which a design that is both completely out of scale to the context and that does not reflect any locally distinctive features, and also presents a largely blank and inactive frontage to King Street. The disconnected style and poor maintenance of the building make it undesirably stand out, negatively impacting the image of the centre. This also presents an unappealing view and impression of the centre for anyone approaching from Darlaston Road.

There is a greater presence of street furniture in this centre when compared to others in The Black Country. King Street features multiple benches and decorative planters that have a noticeable positive impact on the area, especially when compared to the aforementioned areas of less quality.

CONCLUSION

Darlaston's commercial uses are weighted towards convenience which has seen the largest increase of all uses since 2009. Vacancies are in line with similar nearby centres though have decreased by over 1,000 sq.m since 2009. Collectively the centre features a good mix of uses though there is a risk of a continual decrease in an already low comparison goods market.

Though there are a number of areas in need of physical improvement, as a whole the centre is more visually appealing than many others in the Black Country. The area would benefit significantly from investment in improved frontages in the aforementioned areas.

Darlaston does not have a sizeable number of commercial units yet the centre's boundaries are extensive. This has the effect of diluting the commercial critical mass of the town, and making the centre feel lacking in vibrancy. It is advised that the boundaries are reduced and that an effort is made to concentrate key Town Centre uses towards the centre.

It is clear that Darlaston remains a vital and viable Town Centre.

KEY ISSUES/SWOT

- **Strengths**
  - Attractive listed buildings;
  - Strong anchor with good connection to the Town Centre;
  - Pedestrianisation of King Street;
  - King Street is anchored by Asda.
- **Weaknesses**
  - Poor quality frontages in some areas;
  - Current Town Centre boundary does not encourage a concentration of commercial uses in the centre.

<table>
<tr><td></td><td>

<li style="list-style-type: none">
Dominated by an out-of-context Asda store.
Opportunities
Potential for new development in place of dated buildings or vacant sites.
Consolidation of town centre uses on King Street.
Threats
Commercial uses become dispersed and disconnected from the main centre;
Comparison goods continue to decrease and eventually disappear;
Centre is over-reliant on Asda store.

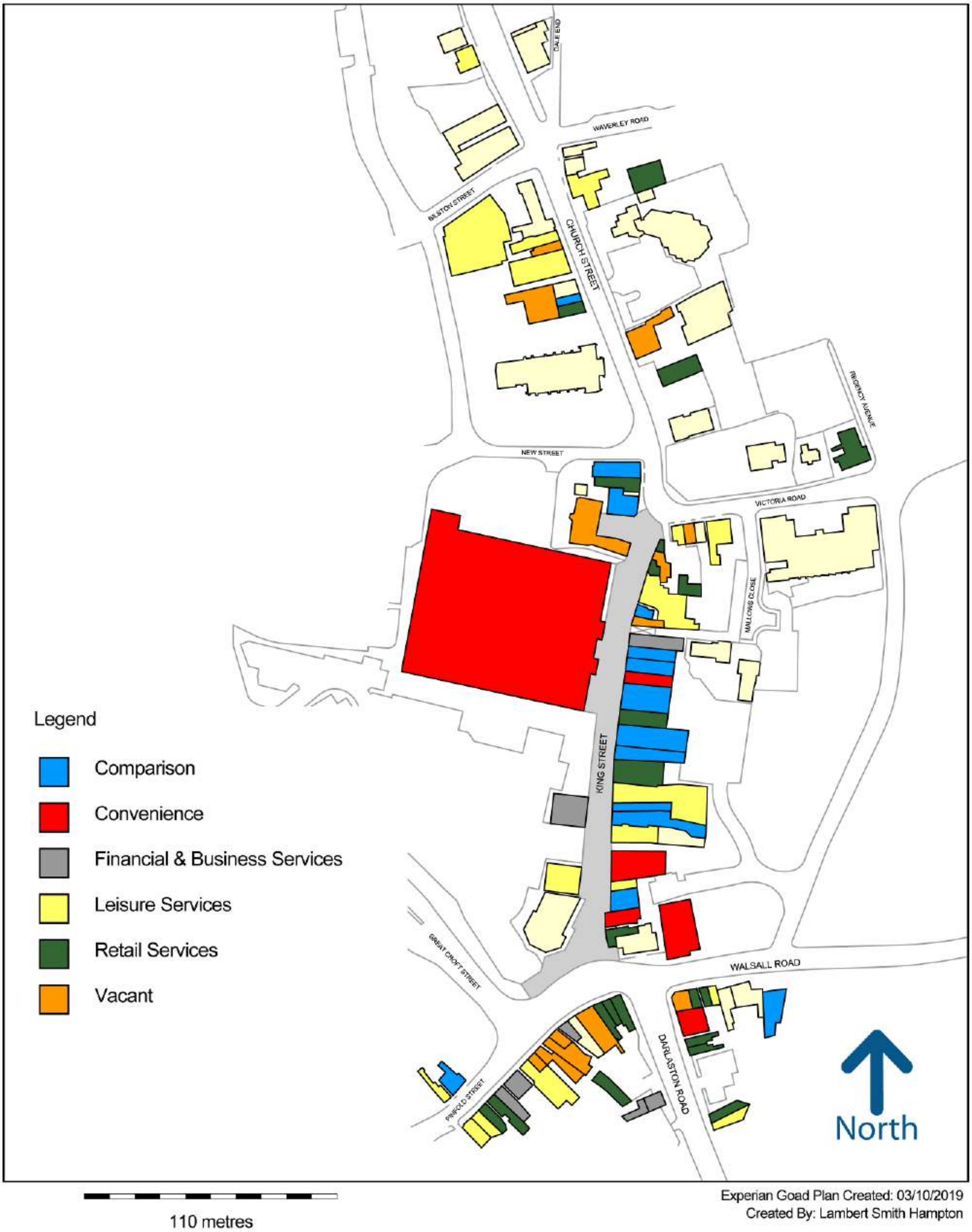
</td></tr>
<tr><td>RECOMMENDED DESIGNATION</td><td>
The following could be explored through a tier-two plan review:
Town Centre Boundary
The existing Town Centre boundary is extensive and encompasses many areas that do not have any town centre uses. The following changes, to the north and south west of the centre, could be explored:

To the north it is suggested that the boundary end at Bilston Street, removing the area north of this and west of Cramp Hill. The area removed from the boundary is predominantly residential with minimal town centre or community uses with little logical connection to the existing centre. The triangle of land containing the business centre between Church St and Dale End should be retained. Office provision in centres remains a key policy aim, therefore the limited existing provision in Darlaston merits protection.
It is recommended that the boundary ends at the entrance to Black Horse Close from Pinfold in the south west. Though the current boundary extends to the start of Moxley Road and includes Darlaston Health Centre, there is little connection between here and the main centre which is separated by residential properties. This area contains few main town centre uses[3], and any such new uses should best be directed towards the existing retail core.

Primary Shopping Area
Darlaston is a Town Centre that has a good range of community uses alongside the retail function, and physically these are relatively well separated. The Town Centre boundary (even after the recommendations above) is large for this level of centre. It is advised that a Primary Shopping Area [PSA] is created to more closely reflect this existing pattern of land-uses and to facilitate consolidation of a retail core. It is understood that the former Unitary Development Plan [UDP] contained a PSA which consisted of the length of King Street, including all of Asda. It is recommended that this PSA is reinstated to ensure that King Street remains a vital and viable retail area with a critical mass of activity and to prevent dispersal of retail activity into other parts of the centre.
</td></tr>
</table>

[3] As defined in National Planning Policy Framework, Annex 2 – Page 68

Darlaston



Experian Goad Plan Created: 03/10/2019
Created By: Lambert Smith Hampton

Map data

Copyright and confidentiality Experian, 2019. © Crown copyright and database rights 2019. OS 100019885

For more information on our products and services:
www.experian.co.uk/goad | goad.sales@uk.experian.com | 0845 601 6011

Appendix 23: District & Local Centres

District & Local Centres

The Core Strategy identifies 93 District & Local Centres (Walsall's Local Centres, and District & Local Centres within the other Black Country Authorities' areas) which perform a crucial function serving the needs of the Black Country local communities, particularly day-today shopping provision.

Core Strategy paragraph 4.33 facilitated the designation of new Local Centres through Tier-Two Plans and since the adoption of the Core Strategy existing clusters of centre-use provision have been designated new Local Centres in Wolverhampton: Chapel Ash Local Centre through the Wolverhampton City Centre Area Action Plan (2016), and in Walsall: Blackwood Local Centre through the Walsall Sites Allocations Document (2019).

An overview by LPA area is provided in Volume 1 and a sample of individual centres is detailed below.

City of Wolverhampton LPA Area

Wolverhampton's District & Local Centres have more detailed policy guidance contained in tier-two plans. These include frontage policies set out in: Area Action Plans (AAPs) (covering Wolverhampton City Centre and the Stafford Road Corridor); Neighbourhood Plans (covering Tettenhall and Heathfield Park); and saved policies in Wolverhampton's Unitary Development Plan (UDP).

The following samples are provided as a snapshot of Local Centres in Wolverhampton as each presents a different form to serve local needs:

- Pendeford Park Local Centre
- Finchfield Local Centre
- Chapel Ash Local Centre

Centre	**Pendeford Park**
Location	This centre is located in the north western suburbs of Wolverhampton, with Pendeford Business Park to the west and the i54 employment site to the north.
Profile	Pendeford Park Local Centre is the focal point of the local area, and benefits from providing a full variety of facilities to serve the local community focussed in an accessible location which encourages linked trips. The centre comprises a primary school, church, community centre, library and health centre. There is also a Public House. The retail function of the centre is anchored by a large Morrisons Store. There are a small number of unit shops, which means there are just 11 units in total, with a mix of uses (A1 uses contributing 46%) and no vacancies as all units are occupied. No recent commercial rents for the Local Centre are

	available.
Overview	The Local Centre is well served by pedestrian access, public transport (including bus stops on Blaydon Road being served by the 4, 6 & 25 buses) and has good pedestrian footfall, particularly to the Morrisons Store, with the unit shops conveniently adjoining the store. There are pedestrian open spaces that enable overlooking and have ornamental tree planting and street furniture such as seating and refuse bins, with a focal point outside the church, library and play area.
Summary	Pendeford Park is a vital and viable Local Centre, which is performing well and makes a valuable contribution to serving the local community.

Centre	**Finchfield Local Centre**
Location	This centre is located in the western suburbs of Wolverhampton, to the west of Bantock Park and serving the community of Finchfield, with other nearby local communities such as Compton Village and Tettenhall Wood being also served by Local Centres.
Profile	The centre comprises 19 units. The retail function is anchored by an edge-of-centre extended Lidl Store. There is a diversity of independent shops including hairdresser, florist, homeware & interiors and hot-food takeaway. National multiples include a Co-operative mini-market, travel agents and Nationwide Building Society. Four units are vacant, all of which have an A1 use-class designation, and a further nine A1 units are occupied, representing 68% of the units in the centre. No recent commercial rents for the Local Centre are available. In addition to the Lidl Store, other important facilities directly adjoining the centre include a Public House, Community Church and Infant School.
Overview	The Local Centre is well served by Public Transport (the number 3 bus) as well as pedestrian access, including pedestrian crossings either side the button roundabout at the top of Finchfield Hill and across the B4161 joining both parades of shops that form the Local Centre. Car Parking is provided both off-street outside the shopping parades and at the Lidl Foodstore, encouraging linked trips. There is good visibility and overlooking, and well established tree planting contributes to a pleasant environment.
Summary	Finchfield is a vital and viable Local Centre, which is performing well and makes a valuable contribution to serving the local community. The four vacant units, which are already in A1 use-class designation provide an opportunity for the retail function of the centre to be further expanded in the future.

Centre	**Chapel Ash Local Centre**
Location	This centre is located on the western edge of Wolverhampton City Centre. The Local Centre falls within the City Centre Area Action Plan (AAP) boundary and was designated as a Local Centre when the AAP was adopted in 2016. The centre is located where the three main arterial routes serving the west of the city converge. Being outside the city centre's ring road the centre serves the local area, including the residential areas of West Park and along the Tettenhall, Compton and Merridale Roads, as well as important businesses, such as the headquarters of Marstons Brewery.
Profile	Chapel Ash is a distinctive Local Centre as it is predominantly linear in nature, dominated by two long parades of units either side the A41, and is anchored by a number of development opportunities. The centre has 84 small units, which are predominantly independent shops, with few national multiples (e.g. Barclay's Bank, Subway and Co-operative Funeral Care). The variety of units include cafes, hairdressers, public houses, restaurants and hot food takeaways, together with specialist shops such as providing picture framing, education tutoring and printing services. There are no large foodstore anchors as the centre has a large number of small units and the foodstore function is provided by the nearby Sainsbury's Superstore at St Mark's and a Sainsbury's Local along the Compton Road. New unit shops have been provided by the refurbishment of the Attwood Building. A management company occupies a former church and there is a new-build community church. A future development opportunity exists at the former Eye Infirmary Site. No recent commercial rents for the Local Centre are available. There are 18 vacant units constituting 21% of the centre, and 42 units (50%) have an A1 use-class designation. The close proximity to the City Centre and consequently its tight catchment area, means that the centre performs a distinct local function for residents and workers.
Overview	The two main parades of shops fronting the A41 have good pedestrian access from the local area, including the city centre. A plethora of bus services call at Chapel Ash, including the numbers 1, 3, 4 & 10. The area has a vibrant feel due to the bustle of activity with its proximity to the city centre, which also extends into the evening, with restaurants and hot-food takeaways. Whilst there is an element of off-street car parking within walking distance of Chapel Ash, such as at West Park and Clifton Street, on-street parking along the A41 can cause challenges to traffic flow. The built form of the area means there is a diversity of architectural features, the main frontages enable overlooking, and the environment includes seasonal ornamental planting, and pockets such as the well maintained grounds of the former St Mark's Church.
Summary	Chapel Ash is a vital and viable Local Centre, which is distinctive

	in providing predominantly specialist and independent shops and services for residents and workers on the western edge of Wolverhampton City Centre. There are a number of opportunities for the centre to continue to diversify in the future.

Other Locations
Outside the network of centres there are important stand-alone and parades of shops that serve the local community e.g. at Lanesfield. These are subject to policy guidance, including e.g. Black Country Core Strategy Policies CEN6 & 7, which are being reviewed as part of the Black Country Plan preparation. At present, there is no evidence to suggest that any additional clusters of existing centre-use provision in the current urban area of Wolverhampton should be designated as Local Centres (e.g. some parades of shops are within the catchment area of existing centres). However, in the future, clusters of existing centre-use provision in the current urban area could be explored to be designated as new Local Centres to serve the needs of existing and future communities through the review of Tier-two plans.

Summary

Wolverhampton has a variety of District & Local Centres that perform a crucial function serving local communities. It is important to protect these centres and maximise the opportunities to ensure their future vitality and viability.

Dudley MBC LPA Area

Dudley's Tier-three Centres have more detailed policy guidance contained within the Dudley Borough Development Strategy (DBDS). Within the DBDS the boundaries of these centres are designated, and relevant policies are set, including a Protected Frontages Policy (Policy L9).

Outside the network of designated Tier-one, Two and Three Centres, there are important stand-alone and parades of shops that serve the local community e.g. at Norton (The Broadway) and on Priory Road, Dudley. These are subject to planning policy guidance, specifically Black Country Core Strategy Policies CEN6 and 7, with these policies currently being reviewed as part of the Black Country Plan preparation.

At present, there is no evidence to suggest that any additional clusters of existing centre-use provision in the current urban area of Dudley should be designated as Local Centres (e.g. some parades of shops are within the catchment area of existing centres). However, in the future, clusters of existing centre-use provision in the current urban area could be explored to be designated as new Local Centres to serve the needs of existing and future communities through the review of Tier-two plans.

The following provides a more detailed assessment of the health, vitality and viability of a sample of Dudley's Tier-three Centres. They have been specifically chosen for the following reasons:

- Kingswinford District Centre – a relatively well performing centre within the north of the borough.
- Lye District Centre – within an area proposed for significant housing growth and regeneration.
- Hawne Local Centre – a recently designated Local Centre.

Centre	**Kingswinford District Centre**
Location	Kingswinford District Centre is a well-established centre located in the north west of Dudley Borough. It is cruciform in shape, focused on the junction of the A491 (Market Street) and A4101 (High Street/ Summer Hill), known as Kingswinford Cross, with the majority of the centre, linear in form centred on the A491 to the south of this junction. Kingswinford Cross is designated as an Area of Special Townscape Value.
Profile	Kingswinford District Centre is the focal point of the local area, and benefits from providing a variety of facilities to serve the local community focussed in an accessible location which encourages linked trips. The centre includes a church, a library and two public houses. The diverse mix of units contains a number of beauty salons, pharmacies and local food shops included a Co-operative Food Shop.
Overview	Kingswinford District Centre is well served by pedestrian access and public transport, with two bus stops within the centre. The centre also has a good pedestrian footfall from the surrounding residential areas, particularly from the south and west of the centre. Traffic Regulation Orders prevent on-street parking along the A491 and A4102, however there is a relatively large public car park to the east of the centre, accessed off Penzer Street, as well as cycle parking available outside the pharmacy at 9 Market Street. In addition to good transport links, the centre also benefits from an area of hard landscaping forming a significant area of public realm at Townsend Place at Kingswinford Cross, with benches and trees, which is sometimes utilised as a market area.
Summary	Kingswinford is a vital District Centre, which is performing well and makes a valuable contribution to serving the local community. The currently vacant units provide an opportunity for the function of the centre to be further expanded in the future to meet the needs of the local community.

Centre	**Lye District Centre**
Location	This centre is located in the south of Dudley Borough with Stourbridge Town Centre to the west. It is a linear centre, formed

	around the A458, with a by-pass to the north, and part of the centre is known as Lye Cross centred on the junction of the A458 and A4036 Pedmore Road. Lye Railway Station and the River Stour lie to the north of the by-pass. There are large industrial areas nearby, especially to the east of this centre.
Profile	It is a well-connected District Centre with a traditional High Street containing a strong range of local amenities and services. In addition, the centre is well integrated with the local character and industrial heritage of the area. As set out in the Dudley Borough Development Strategy (2017), Lye District Centre has been identified as a key location for housing regeneration
Overview	Lye District Centre is the focal point of the local area, and benefits from providing a variety of facilities to serve the local community focussed in an accessible location which encourages linked trips: the centre includes a church, a mosque, a library, a health centre, community centre and a public house. There is also a nursery/pre school located within the centre. With reference to the most recent Centres' Health Check (2019), Lye District Centre currently has a large number of units with a varied mix of uses. There are a total of 117 units within an A1 use, comprising around 40% of the total units. There is a noticeable percentage of units which serve the needs of the diverse population living in and around this centre, and it has been recognised as a night time destination, especially as a result of there being a large number of Bangladeshi and Indian restaurants within it. At the time of the survey, 12 units were recorded as vacant with an A1 and A2 use as the lawful use. Lye District Centre is well served by pedestrian access, especially from residential areas to the south of the centre, as well as good public transport links by buses and trains: Lye Train Station is approximately a 5 minute walk to the north of the centre. There are a number of off-street parking areas serving the centre, particularly accessed off the Lye By-Pass, as well as on-street parking available in bays along the A458. In addition to good transport links, the centre contains a number of green spaces with tree planting and street furniture (waste bins and benches) including a pocket park and an area of open space around the church. Further regeneration opportunities for the centre have been recognised with the centre identified as one of those within the Black Country Garden City iniative. These opportunities are focused on potential housing growth to the north and east of the centres and the integration of those new housing areas into the green spaces focused on the Stour Valley as an accessible open space for health and regeneration. It is considered that should this growth be delivered, this will have a positive impact on the future

	vitality and viability of this District Centre.
Summary	Lye is a vital and viable District Centre, which is currently performing well and makes a valuable contribution to serving the local community. There are a number of further regeneration opportunities identified in the centre including housing growth and development of open spaces for public use. These will continue to strengthen Lye as a district centre meeting the needs of the local community.

Centre	**Hawne Local Centre**
Location	This centre is located in the South West part of Dudley Borough with Halesowen Town Centre directly to the east. The centre is linear in form, fronting onto the A458 (Stourbridge Road). There is a secondary school (Windsor High School) nearby as well as the Halesowen Town Football Club ground and a local park (Hawne Park). This centre was designated as a new Local Centre within the Black Country Core Strategy (2011), and its boundary defined within the Dudley Borough Development Strategy (2017). It is therefore a relatively recently designated Local Centre.
Profile	Hawne Local Centre is the focal point of the local area, especially the Belle Vale housing estate, and benefits from providing a variety of facilities to serve the local community focussed in an accessible location which encourages linked trips. The centre includes a small scale retail store (Tesco Express) as well as a chemist and veterinary surgery. With reference to the most recent Centres' Health Check data (2019), there are 47 units in total within the centre, with a mix of uses, of these, units within the A1 Use Class comprise 63%, and there are currently two vacant units, which have a lawful A1 Use.
Overview	Hawne Local Centre is well served by pedestrian access, public transport and has good pedestrian footfall from the surrounding residential areas. The centre is primarily served by the A456, from which a number of off street parking areas are served. There is a grassed area in front of 197 – 207 Stourbridge Road, but apart from that very little green infrastructure, or street furniture within the centre.
Summary	Hawne local centre is one of the smaller centres but the units sufficiently meet the needs of the local residents. There is scope for further retail expansion with the current vacant units with A1 as the lawful use.

Sandwell MBC LPA Area

Sandwell's Tier-three Centres boundaries are designated by the Site Allocations Document (SAD) Development Plan Document Proposals Map, currently under review as the Sandwell Plan.

The current Black Country Core Strategy Hierarchy of centres (Policy CEN2) inadvertently did not contain all the Sandwell Tier-three centres from the SAD proposals map. This was noted in the 2017 Issues & Options Report and will be rectified in the Draft Black Country Plan Centres.

Beyond the current centres identified in the current SAD, the review of the SAD DPD (the Sandwell Plan) will explore the possibility of identifying an additional local centre where there is existing centre-use provision in the current urban area on the Hagley Road as part of the plan making process.

The SAD DPD Retail & Centres chapter identifies the role of centres as the focus for financial and professional services to support the retail function, and the focus for the evening economy via restaurants and bars. The Frontages policy is directed at Town Centres.

An assessment of a sample of Sandwell's Tier-three Centres follows below. The following centres have been specifically chosen for the following reasons:

- Stone Cross District Centre – a relatively well performing centre to the north of West Bromwich, on the main route from West Bromwich to Walsall, in a low density residential area.
- Causeway Green Local Centre – A linear centre, split by the busy Wolverhampton Road.
- Bristnall - a local centre with a limited local catchment, but performing well.

Centre	**Stone Cross District Centre:**
Location	Stone Cross District Centre is to the north west of West Bromwich, on the main route to Walsall on the A4031.
Profile	Its form is on several sides of a large island. The island had a Cinema/bingo hall and a pub on it. This is now a new build block of flats and a restaurant respectively. It has several convenience stores, the principal being a Tesco Express with a petrol filling station. Of the 46 commercial units in the centre, over half are A1 retail. There are no banks, but West Bromwich Building Society has a branch
Overview	The centre has a good range of day to day provision, including a butchers, bakers, a pharmacy, post office, florist, optician, veterinary, other uses include Hair Salons/Barbers and estate agents. A medical centre is on the edge of the Centre, as is a day nursery and a social club. A church and library are close by. There are two restaurants, and 7 hot food takeaways. There are 4 vacant units. The centre is on a 'red route' high frequency bus route (no 4) to West Bromwich & Walsall. Other services connect to Wednesbury. Car parking is noticeably deficient for the centre. Two uses have dedicated car parks i.e. Tesco Express and a pub. The rest is

	limited to 1 hour on street parking. Pedestrian access from the surrounding residential area is good. Pavements have been widened considerably to the benefit of pedestrians. Landscaping initiatives include street trees planted at intervals, block paving to pedestrian areas, street furniture including decorative metal benches and cycle stands, and tourist information stands
Summary	This is a successful local centre, that meets a substantial number of day to day needs.

Centre	**Causeway Green Local Centre**
Location	This centre is in the south of Sandwell. It is a linear centre along the B4169, bisected by the busy Wolverhampton Road (A4123).
Profile	The surroundings are mixed residential and commercial uses. It is about 700 m from M5 Junction 2. This is served by a variety of buses, with Birmingham, Dudley, Bearwood & West Bromwich on the routes.
Overview	This is a small local centre, with a limited offer. With two convenience stores, either side of the A4123, a pharmacy, a post office, Veterinary, Micro bar, and Doctors Surgery are located in the centre, hot food takeaways and hair salon are also here, as is a phone shop and a bridal clothes shop. Within the boundary is a buffet style restaurant. This is in a large former 'roadhouse' style pub (Hen & Chickens) that really relates to the Wolverhampton Road, rather than Causeway Green Centre. There is a small, free council car park. This is required as the B4169 street is narrow and has double yellow lines except for a 5 bay on street parking area on its western side. The eastern side of the centre has no car parking except on the frontages of the commercial properties. The pedestrian environment is low quality. There is insufficient width to widen pavements, put in street furniture etc, or to separate pedestrians from passing traffic. The centre is further compromised by the A4123 splitting it in two. The Wolverhampton Road does however provide the only green space in the centre, along its verges.
Summary	A small local centre, that thrives on the diversity of its service offer but compromised by the A4123 splitting it in two.

Centre	**Bristnall Local Centre**
Location	Bristnall is a small local centre in the south of Sandwell, 2.4 km East of Blackheath Town, at the convergence of five local roads.
Profile	This is a small centre comprising of 17units only. It is on the roads adjacent to a roundabout in an established residential area. The

	surrounding dwellings are predominantly private sector, low density inter war semi-detached houses.
Overview	The centre has a small supermarket, a post office, a dentist, laundrette, a pub and a deli/café. Other units are occupied by two hair salons, a vape shop and two takeaways, a florist and an off licence. The centre is on several bus routes, with Birmingham, Oldbury, West Bromwich & Bearwood on routes. The pedestrian environment is good, mainly due to the lack of oppressive levels of traffic in this centre. Limited improvements have been made to the centre, with bollards restricting parking on frontages to some of the units.
Summary	This is a very local centre that is vital and does not appear to have any significant issues.

Walsall LPA Area

Walsall's Local Centres have more detailed policy guidance contained in tier-two plans. These include the Walsall Site Allocations Document (SAD) objective 4 and policies SLC1, SLC2 and HC2 - and Walsall Unitary Development Plan (UDP) in Strengthening Our Centres Part 1 and policies S2, S3, S6, S8-10, S12, S15, T6, T7, T9 and T12.

The following three examples provide a snapshot of Local Centres in Walsall and each present different area character and make-up adapted to serve different local needs in the centre, North West and South East of the borough.

Centre	**Caldmore Local Centre**
Location	Caldmore is located immediately to the south of Walsall's Strategic Centre but despite only being 300m from the boundary has retained a separate character and identity. Caldmore developed around Caldmore Green, formed by the key road junction of Caldmore Road and Corporation Street during the Industrial Revolution. This is still the heart of the centre and consists of mainly red-brick Victorian buildings set immediately onto narrow streets. The Old White Hart Inn is Grade II* listed.
Profile	Caldmore is the largest Tier-three centre in Walsall borough with 329 addresses falling within the local centre boundary. Of these, 39.2% are in use as commercial premises. Centre uses vary with 24% in retail use, 4% office use, 6% as restaurants or hot food takeaways and 3% community use. 8% of properties were vacant at the time of the study which is in line with the average vacancy rate across tier-three centres. Residential properties make-up 48% of the buildings and commercial properties 39%. There is no major retailer or anchor; though there is the small Post

	Office. This lack of a traditional anchor store does not appear to inhibit Caldmore and may work to differentiate it from the nearby Walsall town centre.
Overview	The various community centres within Caldmore act as anchors and engage with the local community through several outreach programmes and the annual Caldmore Village Festival, which is well attended and has a different theme each year. The local independent shops carry a diverse range of goods, specialising in food reflecting the diverse community, alongside other services including jewellery, clothing, beauty services, and homeware. The majority of shops are long-standing within the centre and are well-established with good reviews from customers. The centre itself consists of mostly Victorian red brick buildings with the Old White Hart Inn as focal point near Caldmore Green. This gives a strong sense of heritage and character which helps differentiate Caldmore centre from the surrounding 1950's residential areas. Caldmore is mostly used by the residents who live nearby and who can walk into the centre fairly easily. As one of the main routes into Walsall town centre, the roads through Caldmore are often busy and congested with limited parking on the roads. There is only one small car park within the centre itself. Congestion may impact on air quality as many shops open directly onto narrow pavements and the busy roads. There are pedestrian crossings in the centre and south of centre but few to the north. There are no cycle lanes or bicycle stands and there is only one bus route . There small area of greenspace area at Caldmore Green is largely inaccessible for wheelchair users and there is no purpose built outdoor seating or other street furniture within the centre. There is no other green space within the centre itself, though a popular community garden has been established on the centre boundary. More generally, the narrow pavements and road layout are an obstacle to ease of accessibility. Bus stops lack seating and some dropped kerbs are in inconvenient or unsafe locations for pedestrian crossing.
Summary	Caldmore is performing well as a local centre but would benefit from environmental improvements. It has low vacancy rates and established independent retailers. The strong community links to the religious institutions, the health centre, community garden, and primary school provide a use beyond the traditional retail model and enhance the vitality of the area. Caldmore is a good example of how a centre can thrive without a traditional anchor store and instead being made up of local community uses.

Centre	Lane Head Local Centre
Location	Lane Head is a mid-sized local centre located in the west of the borough. It is a mixture of commercial and residential units spread along both sides of the busy High Road. Lane Head is located mid-way between the two Tier-two centres of Willenhall and Bloxwich.
Profile	Lane Head centre has 79 addresses located within its boundary. Of these 32% are in use as commercial units and 60% are residential. The average number of commercial units is 48% for a Tier-three centre so Lane Head is below average in this measure. 16% of properties are A1 retail, anchored by a Tesco Express in the middle of the centre. 4% are A2/B1 office use, 4% are comprised of A5 hot food takeaways, and 3% is sui generis. 6% of properties were vacant at the time of the survey. The area within and around the centre has experienced a lot of recent development. The Methodist church that originally fell within the centre was demolished and redeveloped for housing, the centre boundary was subsequently contracted in the Walsall SAD
Overview	Lane Head appears to be visited for day to day shopping rather than as a destination in and of itself. The Tesco Express works as a small anchor for a short visits and limited linked trips to other nearby shops. There is very little greenery, street furniture, civic amenities, or community uses within the centre to encourage longer visits. Lane Head centre is located on a very busy road, which limits access by car. There is parking for customers at Tesco Express but there is limited parking elsewhere. It served by one bus route which runs every half an hour. There is no cycle routes or cycle provision. Accessibility is built into dropped curbs either side of the main road though opportunities for safe crossing are limited to one junction and the road otherwise offers no public amenity or greenspace. The nearby residential properties, both within the centre itself and in the surrounding area, provide a stable client base who can access the centre by foot.
Summary	Lane Head is a Local Centre with potential to improve. Most commercial properties fall in A1 use and there are not many surviving community facilities, which may mean that the centre is vulnerable due to a lack of resilience through diverse uses.

Centre	Blackwood Local Centre
Location	Blackwood Local Centre is a small parade of shops running along Blackwood Road in Streetly in the south-east of the borough. It was elevated to a Tier-three local centre designation in Walsall's SAD (2019).
Profile	Blackwood consists of 28 addresses within the centre boundary. 64% of these addresses are in use as commercial properties and the remaining 36% are residential properties. Of the commercial units, 25% are in use as A1 retail, 4% are used as A2/ B1 offices, 7% are A5 hot food takeaways, 4% are sui generis use and 25% are D class properties. The centre is fully occupied and there are no recent commercial rents available. There is a primary school, church, library, post office, and local scout group within the centre and a local high school just on the edge of the centre. Blackwood Park on the edge of the centre provides open space for the local community.
Overview	The centre provides the local community with access to a number of facilities. The churches provide a variety of health, social and fitness activities, the library also has several clubs and activities with the local shops providing a range of essential goods. There is a small green adjacent Streetly Library and properties have wide lawned frontages offering an open and airy environmental character. There is a small parking bay in front of the shops and the road is on a bus route with stops outside the shops with services every half an hour. Footfall also comes from the large surrounding residential area and the centre is well served by pedestrian access although there is no pedestrian crossing which would form a good connection between both sides of the centre.
Summary	Blackwood is a strong local centre despite its proximity to another Local Centre at Streetly. It provides strong community facilities and essential goods and services. The majority of its trade is drawn from the surrounding residential areas. This community link provides Blackwood with a layer of resilience and vitality.

Other Locations

Outside the network of centres there are important stand-alone and parades of shops that serve the local community. These are subject to policy guidance including Walsall UDP Policy S6 (but not the Walsall SAD) and BCCS Policies CEN6 & 7. The BCCS is being reviewed as part of the Black Country Plan preparation. At present, there is no published evidence to suggest that any additional locations (shopping parades or clusters of existing centre-use provision in the current urban area) in Walsall should be designated as Local

Centres in their own right outside of the catchment area of existing centres. However, in the future, the potential for clusters of existing centre-use provision in the current urban area could be explored to be designated as new Local Centres to serve the needs of existing and future communities through the review of Tier-two plans. Example candidates that could be considered for designation may include:

- Hardwick is sited in the east of the borough on the junction of Chester Road and Hardwick Road/Little Hardwick Road, within a kilometre of the Local Centre of Streetly to the south and Blackwood (allocated in Walsall SAD, 2019) to the south west. The crossroads hosts the Hardwick Arms public house opposite a mixed shopping parade (made-up of a takeaway, convenience and comparison retail, hairdressers, florist and a post office, with restaurant opposite, encircled by a mix of residential houses, apartments and a care home. Three bus routes pass through the Wood Lane bus stop in the centre.

- Rough Hay is at the junction of Hall Street, Hall Street East and Rough Hay Road. It is 0.75 km west from the de-designated Local Centre of Darlaston Green and 1.5 kilometre north of Moxley Local Centre. The crossroads hosts convenience and comparison retail, takeaways, pharmacy, barbers, with a post office and surgery within 1 kilometre, surrounded by an established housing estate. Three bus routes pass through the centre.

- Pool Green is the junction of Bosty Lane and Walsall Road, over a kilometre south west of Aldridge District Centre. It hosts a restaurant, hairdressers, beauticians, takeaway and convenience retail surrounded by detached or semi-detached housing stock. Three bus routes pass through the centre at Westbrook Avenue.

- Chapel Green is along the Walsall Road 350m East of Willenhall Disrict Centre. Centre uses along this road cluster include restaurants, takeaways, retail units and three public houses. These are supported by small-to-medium employment uses and a surrounding residential area characterised by older terraced and semi-detached dwellings as well as post-war apartment blocks. There is a complimentary use in the doctor’s surgery along Fisher Street to the South.

Summary

Walsall has a mix of Local Centres that cater to local needs and demand supporting the range of communities that live, work, play or study outside of the larger strategic and town centres. The Local Centres reviewed here represent the unique character of their communities and require protection in policy to maintain their role in ensuring the vitality of local shops and services. The number and extent of Local Centres may be subject to review in future local plans to respond to the ever-changing needs of residents and businesses.

Lambert Smith Hampton

United Kingdom House

180 Oxford Street

London

W1D 1NN

+44 (0)20 7198 2000

lsh.co.uk

Lambert
Smith
Hampton

lsh.co.uk