

# **BLACK COUNTRY CENTRES STUDY**

## **– ADDENDUM 2022**

for:

**The Black Country Authorities**

**Comprising:**

**City of Wolverhampton Council  
Dudley Metropolitan Borough Council  
Sandwell Metropolitan Borough Council  
Walsall Council**

**FINAL**  
**Volume 1: Main Report**

November 2022

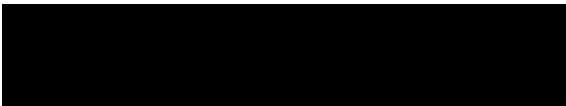
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Signed:



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Dr. Steven Norris

For and on behalf of Lambert Smith Hampton

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## 1. Introduction

- 1.1 Lambert Smith Hampton (**LSH**) was jointly commissioned by the City of Wolverhampton Council (CWC); Dudley Metropolitan Borough Council (DMBC), Sandwell Metropolitan Borough Council (SMBC) and Walsall Council (WC) hereafter 'The Black Country Local Authorities (**BCLA**)' to update and provide an 'addendum' to the key findings of the following studies that had informed the emerging Black Country Plan (BCP):
- the '2020 Black Country Centres Study'
  - the '2021 Black Country Centres Study Update' that took account of the immediate impacts of the Covid-19 pandemic and the then latest available forecasts. It also accounted for the BCP period running to 2039 and changes to the planning system (such as use-class and permitted development rights).
- 1.2 The findings of the 2022 addendum take account of any major changes since the 2021 Update. This includes a review of the national post-pandemic impact including the changes to online shopping, home working, occupier finance, business start-ups/ failures, demand for retail floorspace, national planning changes and residential potential. Whilst a large element of this was covered in the 2021 Update, this addendum updates and details any significant changes.
- 1.3 A vital component of the 2022 addendum, has been to update future need ('capacity') for new retail (convenience and comparison goods) floorspace over the period to 2039. This utilised the study area and market share analysis from the NEMS household survey that informed the 2020 Centres Study and has been updated with the most recent and up-to-date data inputs.
- 1.4 The addendum provides an update and broad review of current and forecast office and leisure trends.
- 1.5 This addendum updates and builds on the findings of the 2020 and 2021 studies and provides advice to help inform the preparation of Local Plans<sup>1</sup>.
- 1.6 For ease of reference this report is structured as follows:
- **Section 2** highlights current trends that are driving the dynamic changes in the retail sector.

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<sup>1</sup> The 2022 Centres Study Addendum was commissioned to inform the Black Country Plan (BCP) and aims to provide updated evidence to 2039 (a BCP 15 year time horizon). The BCP was a joint Local Plan by the four Black Country Local Authorities of Dudley, Sandwell, Walsall and Wolverhampton. In October 2022 the Councils agreed not to proceed with the BCP and for the individual local authorities to prepare their own individual Local Plans. As a result, this report will now provide evidence for future planning work, in particular to inform the preparation of those Local Plans.

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- **Section 3** provides a summary update for the 'Tier 1'<sup>2</sup> and 'Tier 2'<sup>3</sup> centres based on the latest available floorspace and outlet data.
  - **Section 4** sets out the key assumptions and forecasts underpinning the quantitative need ('retail capacity') assessment.
  - **Section 5** details the updated outputs of LSH's in-house CREATE (excel-based) capacity model.
  - **Section 6** provides a brief update for the office sector.
  - **Section 7** provides a brief update for the leisure sector.
  - **Section 8** summarises the findings and advice set out in this Addendum.

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<sup>2</sup> Tier 1 centres are: Wolverhampton City Centre; Brierley Hill (Traditional High Street and Merry Hill Shopping Centre); West Bromwich; and Walsall.

<sup>3</sup> Tier 2 centres are: Bilston, Wednesfield, Dudley, Stourbridge, Halesowen, Blackheath, Cradley Heath, Great Bridge, Oldbury, Wednesbury, Cape Hill, Bearwood, Aldridge, Bloxwich, Brownhills, Willenhall, and Darlaston.

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## 2. Retail and Town Centre Trends

- 2.1 As with the 2021 Black Country Centres Study Update, this section summarises some of the key economic, consumer and property market trends that have driven the changes in the retail sector over the last decade and how town centres can respond to these dynamic trends to remain competitive and enhance their overall vitality and viability in the future.
- 2.2 Whilst this addendum has been authored during the post-pandemic phase, the trading environment for the retail and leisure sectors continue to remain challenging as a result of the prevailing global economic situation, the domestic cost of living crisis and the subsequent impact on disposal income and spending patterns.
- 2.3 Although pressures on the economy following the pandemic may be easing, the challenges facing consumers, businesses and town centres continue to intensify. The end of the Government's furlough scheme, and the removal of the majority of relief packages, aligned with recruitment and supply issues, left many businesses exposed. The latest national industry research shows:
- Over 5,000 closed stores in 2021 due to administration, with almost 40,000 jobs lost<sup>4</sup>.
  - This compared with 6,230 store closures in 2020, and over 74,000 job losses.
  - Average vacancy rates for all retail space stood at a record high of 15.7% in 2021<sup>5</sup>.
  - Shopping centres had the highest average vacancy rates (19.1%).
  - Average vacancy rates were lower for high streets (14.4%), and retail parks (11.3%).

### UK Economic Outlook

- 2.4 By way of background, in the 18-24 months prior to the COVID-19 pandemic the UK economy had been characterised by a low growth trajectory. The Office for National Statistics (ONS) identified that the UK's GDP<sup>6</sup> increased by +0.3% (quarter-on-quarter) in the third quarter (Q3) of 2019. This represented a +1% year-on-year increase since 2018 (Q3), which was the weakest growth recorded since 2010 (Q1).
- 2.5 The impact of the COVID-19 pandemic in 2020 saw the UK economy experience its biggest annual decline in Gross Domestic Product (GDP) (-9.9%) for over 300 years. Britain's budget deficit (i.e. the gap between public spending and income from taxes) has also reached the highest levels experienced since the Second World War. Government borrowing climbed to a record £303 billion (or 14.5% of GDP) in 2020/21.

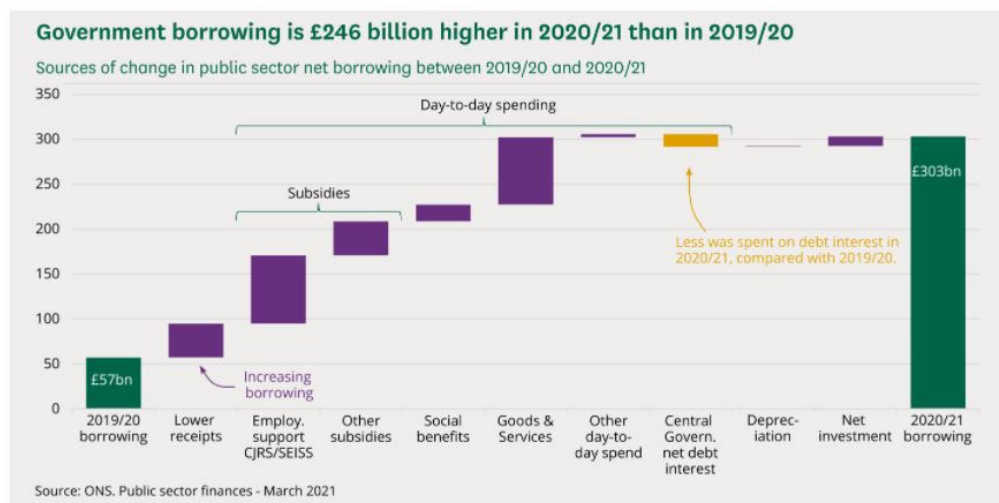
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<sup>4</sup> Centre for Retail Research (April 2022);

<sup>5</sup> Local Data Company (March 2022)

<sup>6</sup> Gross domestic product or GDP is a measure of the size and health of a country's economy over a period of time (usually one quarter or one year). It is also used to compare the size of different economies at a different point in time

**Figure 2.1: Government Borrowing: 2019/20 compared with 2020/21**



Source: House of Commons Library: Government borrowing: Peacetime record confirmed (23/04/2021) <https://commonslibrary.parliament.uk/government-borrowing-peacetime-record-confirmed/>

- 2.6 Experian Business Strategies (Experian) predict in their latest Retail Planner Briefing Note 19 (January 2022) ('RPBN 19') that "recovery over the coming years will be shaped by the after-shocks from the pandemic". The unprecedented nature of the global pandemic means that all forecasts are subject to greater than usual uncertainty and volatility.
- 2.7 GDP in the UK expanded by 7.5% in 2021, making it the fastest growing economy in the G7 group of economies. However, the UK was recovering from a lower base, having seen the largest decline in 2020, at 9.9%. Additionally, the scale of the rebound is uncertain given inflationary pressures; households are faced with rapidly rising inflation, an increase in the rate of national insurance contributions, energy price cap increases, higher interest rates and the prevailing global economic situation.
- 2.8 According to the Office of Budget Responsibility<sup>7</sup>, Consumer Price Inflation is set to peak at a 40-year high of 11 per cent in the current quarter (well above the Bank of England target rate of 2%) is anticipated to rise more intensely than previously anticipated. Hence there are macroeconomic shifts unfolding. Inflation has hit a 30-year high and the backdrop for household finances looks increasingly daunting. A 'cost of living crisis' has emerged, which will hit the least affluent households the hardest, sparking recessionary behaviours, weaker spending and softer confidence. Rising prices are anticipated to erode real wages and reduce living standards by 7% cent in total over the two financial years to 2023-24<sup>8</sup>.

<sup>7</sup> Office for Budget Responsibility - Economic and Fiscal Outlook (November 2022)

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## Retail Spending

- 2.9 The latest Experian<sup>9</sup> forecasts for **retail spend per head** show:
- **Convenience goods:** The impact of COVID-19 resulted in a significant +8.7% surge in spend per head in 2020 but a contraction of -3.7% in 2021. This followed negative growth in 2019 (-1.2%) and with overall growth of -0.6% between 1997 and 2020. As we describe below, the negative growth in convenience goods spending over the last 15 years has had a significant impact on the grocery sector and on retailer business models. Experian predict that the short term outlook for convenience goods reflects the persistence of post-pandemic food spending trends resulting from increased work from home. However these are expected to “unwind” over the medium/long term. Experian forecast a fall in convenience spend in 2022 (-2.0%), and annual (per capita) growth over the medium to long term “*flatlining*” at around +0.1% up to 2040.
  - For **comparison goods** following modest growth of +1.6% in 2020, Experian predict that (per capita) growth will settle at around +2.9% per annum on average up to 2040. This growth forecast is significantly below the historic long term trend (1997-2020) of +5.1% per annum.
- 2.10 These updated expenditure growth trends and forecasts have informed the assessments of retail capacity within this addendum. Any further dampening of growth rates over the short to medium term resulting due to rising inflation and the cost of living crisis will have implications for the viability of existing retail businesses and the demand for new space.

## The Rise of Online Shopping

- 2.11 The growth in non-store retail sales has undoubtedly had the most significant impact on consumer spend and behaviour over the last decade, and on our High Streets and traditional shops<sup>10</sup>. ONS figures show that in 2020, the amount spent in online retail sales increased by 46.1% when compared with 2019 as a whole, the largest annual increase since 2008. Food stores reported the largest increase for total online sales in 2020 of 79.3%

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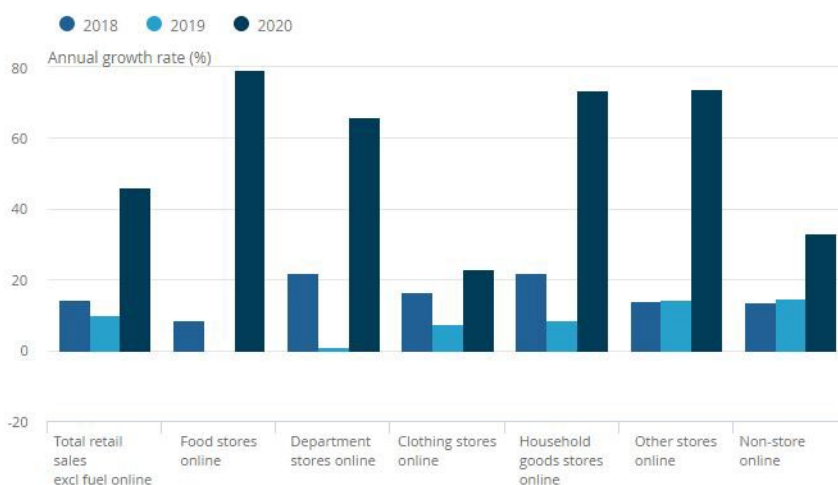
<sup>8</sup> Office for Budget Responsibility- *Ibid*

<sup>9</sup> Source: Experian Retail Planner Briefing Note 19 (January 2022) Figures 1a and 1b.

<sup>10</sup> Non-store retailing is commonly referred to as Special Forms of Trading (SFT). This comprises all non-store retail sales made via the internet, mail order, stalls and markets, door-to-door and telephone sales. On-line sales by supermarkets, department stores and catalogue companies are also included in the data collected by the Office for National Statistics (ONS).



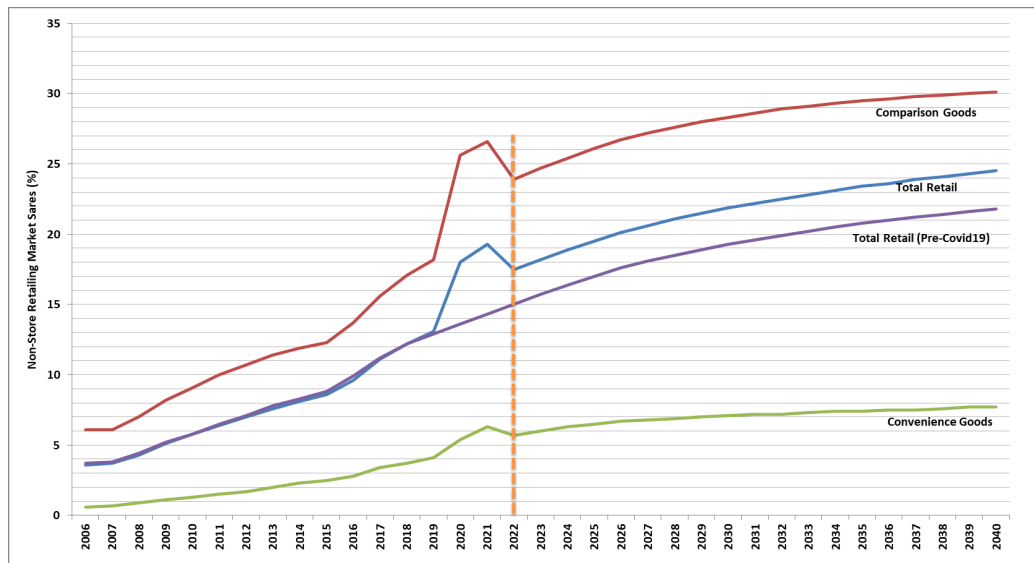
**Figure 2.2: Annual Increase in Total Online Retail Sales for 2020**



Source: ONS: Retail sales, Great Britain: December 2020 (22/01/2021)  
<https://www.ons.gov.uk/businessindustryandtrade/retailindustry/bulletins/retailsales/december2020#annual-increase-in-total-online-retail-sales-for-2020>

- 2.12 As the figure below shows, SFT's overall market share (as a proportion of total UK retail sales) increased from 5.4% in 2006 to 28.1% in 2020. In other words, online accounted for almost one in every three pounds spent on retail goods in 2020. Of this total non-store retail sales, Experian estimate that comparison and convenience goods retailing achieved market shares of 34.1% and 18.0% respectively in 2020.
- 2.13 The impact of COVID-19 has been to increase the market share of non-store retail sales following the series of lockdowns. Experian's latest figures forecast that the total non-store market share to marginally decrease to 27.4% in 2022; and the share of comparison and convenience goods retailing to 31.9% and 19.1% respectively.
- 2.14 The latest Experian forecasts indicate that total SFT market shares will increase to 36.5% by 2040. Comparison and convenience goods non-store retail sales are forecast to reach 40.2 and 25.7% respectively by 2040.

**Figure 2.3: Estimated and Projected Market Shares of Non-Store Retail Sales (SFT), 2006-2040 (Adjusted)**



Source: Experian Retail Planner Briefing Note 19 (January 2022) Appendix 3 and Experian Retail Planner Briefing Note 17 (February 202); Appendix 3

2.15 In terms of forecasting the potential capacity for new physical retail floorspace, Experian estimate that approximately 25% of all SFT sales for comparison goods and 70% for convenience goods are still sourced through traditional (*'bricks-and-mortar'*) retail space, rather than through *'virtual'* stores and/or *'dot com'* distribution warehouses. On this basis, Experian adjust their SFT market shares downwards for total retail to 17.5% in 2022, 19.5% by 2025, 21.9% by 2030 and 24.5% by 2040<sup>11</sup>. These market shares are higher than Experian's pre-COVID-19 forecasts<sup>12</sup> of 15% in 2022, increasing to 21.8% by 2040. In line with standard approaches these adjusted/recalibrated market share figures are preferred for retail capacity assessments and used in this addendum.

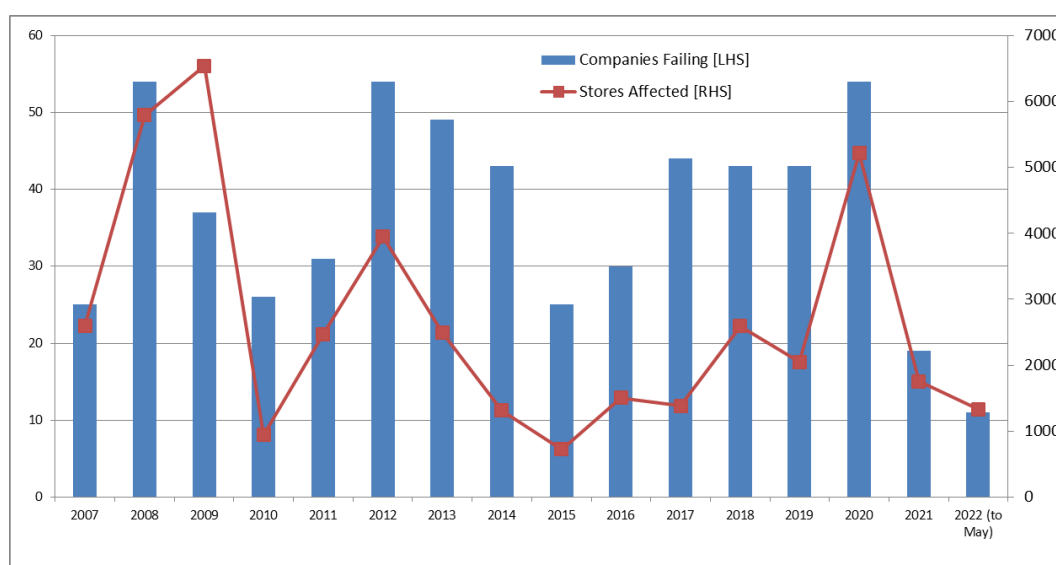
### **Retailer Business Models and Requirements**

2.16 The challenging economic conditions and growth in online sales continues to have a significant and permanent impact on consumer shopping and spending behaviour. However, The Centre for Retail Research recorded just 19 major retail failures in 2021, a 15-year low, down from a joint-record 54 in the previous year.

<sup>11</sup> Experian Retail Planner Briefing Note 19 (January 2022)

<sup>12</sup> Experian Retail Planner Briefing Note 17 (February 2020)

**Figure 2.4: Major Retail Failures (2007 – 2022 (May))**



Source: Centre for Retail Research (2022)

2.17 According to the Local Data Company (LDC), chain stores experienced a net decline of 10,059 units in 2021, but independents recorded a net increase of 2,157 units. This trend is part of a reshaping of the retail sector, as larger chains continue to rationalise their estates, while local and independent retailers find opportunities to meet post-pandemic consumer demand. Growth areas include health and beauty, convenience stores, restaurants and leisure operations; all of which provide services and experiences not easily replicated online.

### Rising Occupancy Costs

2.18 As stated in the 2021 Update, it is standard practice for retail planning assessments to make a reasonable and robust allowance for the year-on-year growth in the average sales densities of existing and new (comparison and convenience) retail floorspace for it to remain vital and viable. However, there is limited evidence detailing actual changes in the turnover and profitability of retailers over time. The latest *Retail Planner Briefing Note* (RPBN 19) (January 2022) provides forecasts of annual floorspace productivity growth rates based on two different scenarios: (i) the '**constant floorspace scenario**', based on limited potential for new retail development, resulting in greater efficiency of existing floorspace; and (ii) the '**changing floorspace scenario**', which takes account of the impact of new retail development on average retailer sales performance. The table below sets out the differences between the two scenarios.

**Table 2.1 Floorspace Productivity Growth Rates (year-on-year growth %)**

	2020	2021	2022	2023	2024-2028	2029-2040
<b>CONSTANT FLOORSPACE:</b>						
Convenience Goods	6.6%	-9.4%	-0.9%	0.2%	0.3%	0.3%
Comparison Goods	-7.2%	-0.2%	6.4%	2.2%	2.4%	2.9%
<b>CHANGING FLOORSPACE:</b>						
Convenience Goods	6.6%	-9.4%	2.7%	1.6%	0.1%	0.0%
Comparison Goods	-7.2%	-0.2%	7.2%	2.3%	2.2%	2.6%

Source: Experian Retail Planner Briefing Note 19 (January 2022); Figures 3a/3b and 4a/4b.

- 2.19 As Experian explain the volatility in sales densities in 2020 and 2021 have been driven by sharp swings in retail spending due to temporary business closures during lockdown(s). There is an expectation that there will be a correction when shopping spending recovery becomes more established and there is near return to more normalised shopping patterns. The medium-term forecast (2024-28) shows an upgrade for comparison goods over convenience goods. Notwithstanding this, Experian predict that budgetary challenges from rising costs and tight margins will remain key factors underpinning floorspace efficiencies over the coming years. Budgetary pressures mean that retailers will have to increase efficiencies from current floorspace including through redevelopment/repurposing of existing floorspace; exploring the potential to adapt such as by having alternate day/night uses; adoption of modern technology and innovations; more effective marketing strategies; and adopting an ‘omni-channel<sup>13</sup>’ strategy that uses internet sales to increase the sales performance of physical shops. This is against a backdrop of weak demand for retail property, high vacancy levels and a significant fall in new retail-led development in centres across the UK.
- 2.20 For these reasons we prefer to test higher ‘constant floorspace productivity’ growth rates for retail planning assessments, as they better reflect national trends and the need for existing retailers to increase their sales potential and profit margins to remain viable.

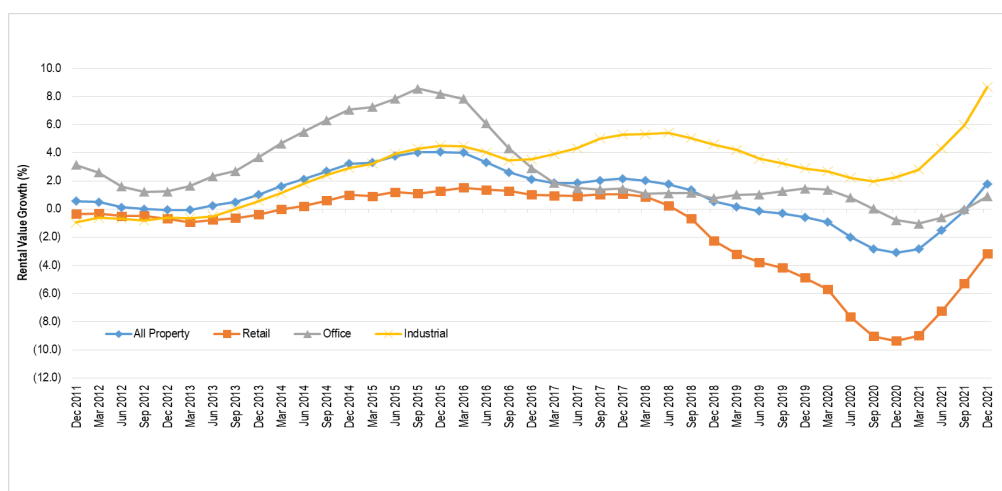
## **Retail & Shopping Centre Investment**

- 2.21 Demand for retail space in centres across the UK has fallen dramatically since 2007. In turn this fall in demand is impacting on property values and rents. For example, LSH research conducted before the pandemic showed that the retail sector recorded a 4.9% year-on-year fall in rents in December 2019 and fell further in December 2020 by 9.4% and

<sup>13</sup> ‘Omni-Channel retailing’ refers to the integration of different methods of shopping available to consumers (e.g. via the internet, in a physical shop, or by phone).

by 3.2% in December 2021<sup>14</sup>. As the figure below shows, retail has performed poorly compared with the other property sectors since 2011.

**Figure 2.5: Average Rental Growth (% Change Year-on-Year)**



Source: MSCI

- 2.22 With close to one-fifth of shopping centre units standing vacant, there is plainly an oversupply of retail space in many UK locations. Retail property owners have increasingly recognised the need to repurpose or reposition the excess space, and this is driving investment and development decisions across the sector.
- 2.23 The general consensus is that somewhere between 20-40% of UK retail space may ultimately need to be redeveloped or repurposed. This is supported by the results of a survey recently conducted by LSH and REVO<sup>15</sup>, with 61.8% of respondents putting the scale of the problem within this range.

## Out-of-Centre Retailing

- 2.24 As detailed in the 2021 update the development and take-up of food and non-food out-of-centre space has also slowed over recent years, in line with the trends impacting on high streets and town centres.
- 2.25 During the pandemic out-of-centre locations and retail parks performed well as they were easily accessible by car, with larger units allowing easier social distancing and support for online delivery fulfilment. However recently there has been a decline affected by closures e.g. Arcadia's out-of-town fascia, Outfit, was one of the largest retail park occupiers in

<sup>14</sup> LSH Research (2022) using MSCI data

<sup>15</sup> LSH & REVO Research (April 2022) - How Can We Deliver the Recovery & Renaissance of Our Towns, High Streets & Shopping Centres?

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Britain prior to its parent company's collapse. Other fashion brands which closed retail park locations included Laura Ashley, Quiz and Peacocks.

- 2.26 Retail parks nevertheless saw vacancy rate decline by 0.2% in the second half of 2021 (H2, 2021) to 11.3% continuing their record of having the lowest vacancy rate of any location type since 2013.

### **Vacancy Rates**

- 2.27 According to Local Data Company<sup>16</sup> (LDC), the first half of 2022 (H1 2022) was the first half-year period since 2020 to have no local restrictions on occupier activity. At the end of H1, 2022, the GB average 'All Vacancy Rate' (retail and leisure combined) according to LDC stood at 10.6% down from 11.3% in 2021 and 10.7% in 2020. Similarly the retail vacancy rate stood at 15.4% down from 15.8% in 2021. The improvement in net change in units was mainly down to a fall in closures. The number of closures across GB was down 7% year-on-year, dropping from 26,703 closures in H1 2021 to 24,832 in H1 2022.
- 2.28 The high street vacancy rate dropped by 0.5% from 19.4% (H1 2021) to 18.9% (H1 2022), the first decline in vacancy for high streets since H1 2017. High streets benefitted from the lifting of restrictions, although the pace of recovery will be tested in response to the challenging economic climate. Shopping centres continue to have the largest vacancy rate of any location type, landing at 18.9% in H1 2022 (from 19.4% in 2021). Shopping centres saw the highest levels of long-term vacancy of any location type with 6.3% of shopping centre units having been vacant for more than three years.
- 2.29 In terms of recovery, city centres are still lagging behind other town segments, with vacancy rates still 3.2% above pre-pandemic levels (13.6% in 2019 compared with 16.8% in H1 2022).
- 2.30 The national trends outlined thus far in this section highlight the challenges facing the retail and shopping sector. Nevertheless, as this sector recovers, adapts and responds to these challenges, retail will still remain an important element and play a crucial role as part of a mix of uses in town centres, including as a focal point for communities to gather and interact, supporting and complementing the future diversification and repurposing of the High Street.

### **Use Classes Order & Permitted Development Rights**

- 2.31 As detailed in the 2021 Update, and since the 2020 Centres Study, the Government issued a series of reforms to the planning system. The reforms principally related to Permitted

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<sup>16</sup> LDC: H1 2022 retail and leisure trends analysis (September 2022)

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Development Rights (PDR)<sup>17</sup> and the Use Classes Order (UCO)<sup>18</sup>. They were also followed by the consultation White Paper ‘*Planning for the Future*’ published in August 2020.

2.32 As part of the suite of planning reforms introduced since 2020, the Government also implemented a series of changes to Permitted Development Rights (PDRs) and the Use Class Order (UCO) system that have potentially significant implications for the planning, management and development of our towns and high streets.

- A new ‘Class E’ (commercial, business and service uses) as part of the new UCO introduced in September 2020, which brings together most of the uses commonly found on the high street; and
- A new ‘Class MA’ PDR introduced in August 2021, which allows for change of use from Class E to Class C3 (residential) without the need for planning permission (although still subject to prior approval and other considerations).

2.33 Research conducted by LSH and REVO<sup>19</sup> provides an early indication of impact and shows that both have proved controversial and have divided opinion. On the one hand they are viewed positively by some as helping to revitalise and repurpose high streets and boost housing delivery, by making it easier to change the use of buildings and respond more flexibly to dynamic market trends and demand. On the other hand, it is argued that the reforms seriously undermine the plan-led approach to town centre regeneration and place-making. The risks highlighted include the loss of vital commercial space on prime shopping streets, the creation of sub-standard piecemeal housing development, and the further weakening of the sequential test by potentially allowing for unfettered changes of use to out-of-centre floorspace.

2.34 In response several Councils have turned to Article 4 Directions (A4Ds) to try to remove PDRs. Where correctly applied, they can help prevent “*wholly unacceptable adverse impacts*<sup>20</sup>” on the vitality and viability of centres through the potential loss of their primary shopping areas.

2.35 The LSH REVO Research details the following top positive and negative views on the impact of the changes to the Use Classes Order and Permitted Development Rights.

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<sup>17</sup> The Town and Country Planning (General Permitted Development) (England) (Amendment) (No. 2) Order 2020/755; & The Town and Country Planning (General Permitted Development) (England) (Amendment) (No. 3) Order 2020/756

<sup>18</sup> The Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020/757 was laid before Parliament on 21<sup>st</sup> July 2020 and amended the Town and Country Planning (Use Classes) Order 1987.

<sup>19</sup> LSH & REVO Research (April 2022) - How Can We Deliver the Recovery & Renaissance of Our Towns, High Streets & Shopping Centres?

<sup>20</sup> Source: National Planning Policy Framework; paragraph 53

Positive Views	Negative Views
Greater flexibility and mix of uses on the high street (47%)	Result in development of poor quality residential accommodation (23%)
Support the long-term viability and vitality of our town centres and high streets (23%)	Loss of continuous primary shop frontages (23%)
Reduce property vacancies in town centres (21%)	Loss of local planning authority (LPA) powers to plan and manage development (20%)

## Levelling Up & Regeneration Bill

2.36 In February 2022, the Levelling Up White Paper set out the Government's ambition to close the gap between much of the south east and the rest of the country. In May 2022, the Government published the Levelling Up and Regeneration Bill. Pertinent to this study, and if enacted, the Bill will provide:

- local authorities wide-reaching powers to instigate rental auctions of commercial properties in town centres that have been vacant for more than a year. These are intended to enable local authorities to rent out commercial properties to revitalise town centres. However the detail behind the practicalities associated with these remain unclear such as how will local authorities force landlords to carry out pre-tenancy works in relation to lettings arising out of rental auctions.
- the bill also provides for 'street votes' on planning applications thereby democratizing the planning process to further advance the localism agenda.
- removal of the duty to cooperate requirement making it easier for neighbouring councils to prepare joint spatial plans. Groups of authorities will be able to produce voluntary Spatial Development Strategies (SDSs) on specific cross-boundary issues, replacing the current system of joint strategic plans. The minimum number of LPAs that could prepare a joint SDS is two, with no upper limit on participation. However, LPAs cannot take the initiative to prepare an SDS if any part of the area covered is within a mayoral or combined authority area.
- the proposed reform to the Community Infrastructure Levy (CIL) and S106 developer contributions to be replaced by a single infrastructure levy that is set locally rather nationally.

2.37 The guiding notion behind the draft Bill is to bring together proposals to improve the existing planning system, including having a greater emphasis on public engagement. There appears to be limited change towards retail strategy within the proposed reforms. However, much detail that is still awaited.



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## Potential for Residential

- 2.38 As indicated in the 2021 Black Country Centres Update Study, increases in town centre living and residential development is likely to be a growth area in the next 10 years as an important element of the structural change and potential regeneration (paragraphs 2.54-8) of centres. Nevertheless, town centres will still be important places for shopping, leisure and working as part of a complementary mix of uses supporting the diversification of centres. Additionally, any future place making could be supported by an increasing resident population. The precise extent of future residential growth in centres will be influenced by factors including the state of the national economy and the implications of more flexibility in national planning changes which will influence the balance of uses in centres.
- 2.39 Consistent with this, the West Midlands Combined Authority (WMCA) Brownfield Land Study by Chilmark Consulting (March 2022) emphasised that the four Strategic Centres in the Black Country were potentially drivers for growth and locations which offered opportunities for change and repurposing focused around greater flexibility and mixed uses, especially to support residential use.
- 2.40 The Chilmark Study also noted that potential additional sources of housing supply in Strategic Centres included considering 'windfall' opportunities associated with the repurposing of existing vacant and under-utilised commercial floorspace, especially retail.
- 2.41 In terms of investigating this further, the BCLA undertook an analysis of examples (including extending the analysis beyond Strategic Centres), which used the same approach and built on the indicative vacant floorspace calculations highlighted in the 'Potential for Transition to Residential' sections in the Centres Study Update 2021 Vol 2 that the Chilmark Study noted as an important and useful consideration of the potential arising from structural changes to town centre retailing and commercial use. The vacant floorspace total was used as a starting point, which was considered to be a realistic proxy for estimating the potential for surplus floorspace coming forward for residential use with the following reasonable assumptions. The vacancy total was adjusted to take account of:
- vacant units within centres but beyond the Goad boundaries / units where residential could not realistically come forward; and
  - vacant floorspace that already contributed to housing figures, such as sites that could become future allocations and sites already identified for residential in Strategic Housing Land Availability Assessments (SHLAAs). This approach addressed the emphasis in the Chilmark Study that any double counting should be avoided.
- 2.42 The assumption that new residential development would be 3 storeys reflects the general physical form of Strategic Centres and with Permitted Development Rights allowing an increase of up to 3 storeys to the existing building as adopted in the 2021 Update. Adjustments were made to this assumption, where relevant, such as where more specific

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information about upper-storey potential was known and where upper storeys are already accounted for in SHLAAs.

- 2.43 Further assumptions included assuming 25% of this remaining floorspace could come forward for residential and a deduction of 15% for communal circulation space. To this an average apartment size of 65 sqm was applied (based on the English Household Survey (2018) and the 'Nationally Described Space Standards' (DCHLG, 2015) which indicated a range between for 51-72 sqm for 1 and 2 bed apartments).
- 2.44 On this basis the, using Wolverhampton as a example, the Council estimated the following potential for residential:
- Wolverhampton City Centre - c.184 residential units from the adjusted 20,915 gross sqm vacant floorspace;
  - Bilston Town Centre - c.24 residential units from the adjusted 2,920 gross sqm vacant floorspace; and
  - Wednesfield - c.6 residential units from the adjusted 653 gross sqm vacant floorspace.
- 2.45 The above shows that any potential residential 'windfall' quantum from surplus floorspace (beyond past trends and sites that could become future allocations) varies by size of centre. The resulting implications are that the Strategic Centres may have some latent capacity due to their spatial composition and size that may contribute to the wider mix of uses. Also, as indicated in the 2021 Update, the impact of pandemic lockdowns included consumers being confined to work in their local areas, resulting in larger centres that are dependent on commuting populations to suffer more adversely than smaller centres. However, for the Tier-Two and Three centres this is likely to be more modest as they are likely to have less quantum of comparative vacant space. This is likely to be due to physical constraints and that smaller centres appear to have been more resilient to recent economic challenges. As indicated in the 2021 Update, the pandemic lockdowns meant that many households worked from home and shopped locally, particularly for food and 'essential' goods supporting town, district and local centres with an immediate residential catchment. Importantly, whilst vacant space could potentially be a source of residential supply, the viability of residential coming forward would be dependent on other factors, including land values, purchase costs, build costs and funding. As indicated in the 2021 Update, these factors, together with any implications of increased planning flexibility, means this is likely to be focussed in the peripheral parts of existing town centres, but the outcomes are still unclear, particularly the likely scale of increased residential and loss of commercial space. The BCLA should nevertheless have a proactive programme to monitor vacant space within its centres to explore potential opportunities as they arise.

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## Summary

- 2.46 In summary, our previous conclusions reinforce the message of this addendum in that our towns, traditional high streets and shopping centres have too much retail floorspace. With unfolding macroeconomic shifts, household finances are stretched and this will have an impact on discretionary retail and leisure spending affecting the sector(s) overall.
- 2.47 The move to a mix of uses within over shopped centres is the way forward. Part of the mix is through residential development. The draft Black Country Plan included ambitious housing targets. Future residential and employment growth provides a unique opportunity to be served by the Black Country's network of centres which can help ensure their future vitality and viability, The Strategic Centres within the Black Country have the potential to contribute to further residential provision and again we recommend that this should be monitored and investigated further. To ensure vitality and viability, any justified new centre use provision should be directed to town centres in the first instance as they will be well placed to serve future development, consistent with national guidance.
- 2.48 As advised in para 12.5 of our March 2020 Study, it will remain appropriate for the BCLAs to make any adjustments to the boundaries of centres and the designation of tier-three centres through tier-two plans, including where clusters of existing centre-use provision in the current urban area to serve existing and future communities could be explored, such as Hardwick in Walsall and Hagley Road in Sandwell.
- 2.49 In broad terms the move back to the town centres will be dependent on consumer spending but also what is on offer. A mix of uses with intergenerational provision, green space and a variety in leisure provision will play a key part in the path to recovery and attracting footfall back to our centres and high streets. Centres in the future will require curation to enable them to continue to thrive and accommodate inclusive social and spatial interaction.

### 3. Healthcheck Update

- 3.1 This section provides a summary update of changes to centres survey data undertaken in the previous reports (Volume 2 of the ‘2020 Black Country Centres Study’ and Volume 2 of the ‘2021 Black Country Centres Study Update’) (covering the Strategic Centres within the Black Country). These healthchecks were drawn from the then latest available Goad Experian data, amongst other primary and secondary quantitative and qualitative data sources and analysis.
- 3.2 In the intervening period, further updates have been undertaken by Goad for certain centres. Furthermore, individual Councils have also provided their own outlet and floorspace data that has been mapped, categorised and analysed based on Goad defined boundaries so as to enable comparisons with previous Goad data. This section of the Addendum therefore highlights some of the key changes based on the most recent available centres survey data.
- 3.3 This Addendum provides an overview covering the following centres:

LPA	Tier 1 Centre	Tier 2 Centre
<b>City of Wolverhampton Council</b>	Wolverhampton City Centre	<ul style="list-style-type: none"> <li>• Bilston</li> <li>• Wednesfield</li> </ul>
<b>Dudley MBC</b>	Brierley Hill (Traditional High Street and Merry Hill Shopping Centre)	<ul style="list-style-type: none"> <li>• Dudley</li> <li>• Stourbridge</li> <li>• Halesowen</li> </ul>
<b>Sandwell MBC</b>	West Bromwich	<ul style="list-style-type: none"> <li>• Blackheath</li> <li>• Cradley Heath</li> <li>• Great Bridge</li> <li>• Oldbury</li> <li>• Wednesbury</li> <li>• Cape Hill</li> <li>• Bearwood</li> </ul>
<b>Walsall</b>	Walsall	<ul style="list-style-type: none"> <li>• Aldridge</li> <li>• Bloxwich</li> <li>• Brownhills</li> <li>• Willenhall</li> <li>• Darlaston</li> </ul>

- 3.4 For Tier-Three Centres, it is understood that BCLA surveys suggest that in general these centres are performing relatively well in terms of the key role they play as local service centres. This would be consistent with smaller centres appearing to have been more resilient to recent economic challenges, with the pandemic lockdowns meaning that many

households worked from home and shopped locally, particularly for food and 'essential' goods, supporting smaller centres with an immediate residential catchment.

### City of Wolverhampton Council: Wolverhampton City Centre

- 3.5 A new Category Goad Report was published for Wolverhampton in May 2022 based on a survey undertaken in January 2022.
- 3.6 The latest Goad report shows that the total number of outlets has only changed marginally (less 4 units) from July 2020 to January 2022.
- 3.7 Overall, between 2020 and 2022, there is a reduction of 4 outlets, although outlets have transitioned between sectors. There has been a reduction of 9 retail service outlets, 5 convenience outlets and 3 financial and business service outlets; a rise of 8 leisure service outlets; and 6 additional vacant outlets.

**Table 3.1: Wolverhampton: Recent Change in Number of Outlets & Floorspace 2019 - 2022**

Category	2019	2019	2020	2020	2022	2022
	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)
Convenience	57	4,989	56	4,998	51	5,045
Comparison	189	64,874	186	61,651	186	61,595
Retail Service	94	8,668	87	8,278	78	7,219
Leisure Service	157	34,393	149	33,176	157	33,436
Financial and Business Service	76	15,496	72	15,097	69	14,502
Vacant	161	40,850	164	42,717	170	46,061
Other Retail	2	167	2	167	1	74
<b>Total</b>	<b>736</b>	<b>169,437</b>	<b>716</b>	<b>166,083</b>	<b>712</b>	<b>167,932</b>

Source: Dates of GOAD Category Reports: 06/09/2019; 07/07/2020 and 20/01/2022;

Category	Change: 2019 -2020		Change: 2020 -22		Change: 2019 -2022	
	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)
Convenience	-1	9	-5	46	-6	56
Comparison	-3	-3,224	0	-56	-3	-3,279
Retail Service	-7	-390	-9	-1,059	-16	-1,449
Leisure Service	-8	-1,217	8	260	0	-957
Financial and Business Service	-4	-399	-3	-595	-7	-994
Vacant	3	1,867	6	3,345	9	5,212
Other Retail	0	0	-1	-93	-1	-93
<b>Total</b>	<b>-20</b>	<b>-3,354</b>	<b>-4</b>	<b>1,849</b>	<b>-24</b>	<b>-1,505</b>

- 3.8 Within these sectors the changes to retail services are mainly a reduction in the number of health & beauty services, of which 7 have closed (reducing the total from 63 to 56 for this category). The rise in the number of leisure services is mostly explained by an increase of 6 fast food take-aways and 3 cafés. In the convenience sector the net loss of 5 outlets is the result of minor changes across many categories.
- 3.9 By way of an additional comparison to the 2019 Goad report there is an overall reduction of 24 units mainly resulting from the loss of retail and financial service outlets. There is also an increase of 9 vacant units over the period to 170 outlets.
- 3.10 Compared to the UK average, the mix of outlets by sector in Wolverhampton is largely similar to the national picture except for having fewer retail service outlets (11.0% compared to 15.8%) and leisure services outlets (22.1% compared to 25.2%). The situation is similar to that in 2020. The reduction in convenience and retail services is different to UK trends, which show very small increases in these sectors. However, Wolverhampton has maintained consistency in the number of comparison outlets whereas the UK has seen a slight decline in this sector.

**Table 3.2: Wolverhampton: Number of Outlets (2022)**

CENTRE	% of Total Outlets			% of Total Floorspace		
	Category	No. Outlets	%	UK Average	Floorspace Sqm	%
Convenience	51	7.16%	9.29%	5,045	3.00%	15.48%
Comparison	186	26.12%	26.93%	61,595	36.68%	30.18%
Retail Service	78	10.96%	15.75%	7,219	4.30%	7.22%
Leisure Service	157	22.05%	25.19%	33,436	19.91%	26.07%
Financial and Business Service	69	9.69%	8.82%	14,502	8.64%	6.65%
Vacant	170	23.88%	13.82%	46,061	27.43%	13.81%
Other Retail	1	0.14%	0.07%	74	0.04%	0.04%
<b>Total</b>	<b>712</b>	<b>100%</b>	<b>100%</b>	<b>167,932</b>	<b>100%</b>	<b>100%</b>

Source: GOAD Category Report Date: 20/01/2022

- 3.11 Wolverhampton has more vacant outlets than the current national average, with a vacancy rate of 23.9% compared to 13.8%. However, the rate in Wolverhampton was only slightly lower in 2020 (23.0%). In addition, there are a number of units identified as vacant by Goad that are subject to regeneration schemes – such as the Civic Halls being in the process of undergoing a significant refurbishment programme.
- 3.12 In terms of floorspace, Wolverhampton shows greater variance to the UK average. It only has 3% of its floorspace in the convenience sector, compared to 15.5% nationally. However, this has been influenced by an important source of convenience provision being the Sainsbury's St Mark's store which was not within the Goad survey area, with the former

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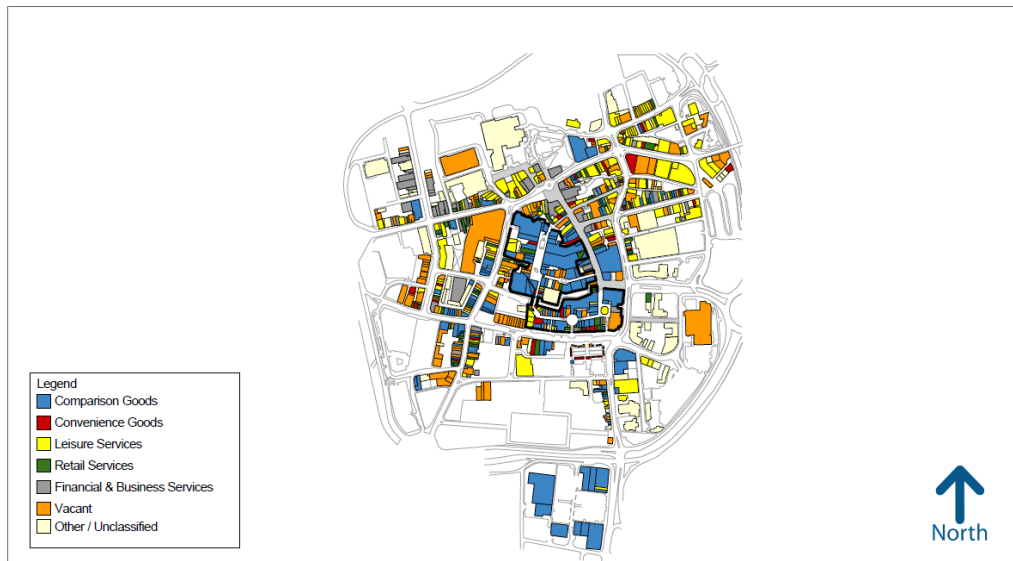
Sainsbury's St George's Parade store being currently vacant and identified as an opportunity for investment, development and regeneration in the Wolverhampton City Centre Area Action Plan and Wolverhampton's 2022 Investment Prospectus<sup>21</sup>. Wolverhampton does have a significantly higher proportion of comparison floorspace (36.7% compared to 30.2%) which is likely to be largely due to its role as a strategic centre. Other noticeable differences reflect trends in outlet numbers, showing less floorspace in the leisure services and retail services. The proportion of vacant floorspace also follows the equivalent trend in outlet numbers.

- 3.13 In terms of the distribution of town centre uses, the figure below shows how the retail uses are distributed across the city centre. This clearly shows two clusters of comparison uses: one is the central core including the Mander Centre and its surroundings; the other is at the St John's Retail Park, which lies on the southern side of the ring road and is included in the Goad survey area. There is a concentration of leisure uses in the north-eastern part of the centre. Other uses are dispersed throughout the centre, as are vacant outlets.
- 3.14 There are a number of regeneration projects and funding streams active for the City Centre, including:
- £150 million investment around the Wolverhampton Interchange and Commercial District including the i9 office development, new station facility and Metro extension,
  - Major refurbishment of the Civic Halls concert venue and associated public realm improvements
  - £25m Towns Fund awarded to Wolverhampton to support the delivery of 10 key projects city-wide, a number of which are in the city centre including Brewers Yard and Arts Park
  - £15.76m secured through the Future High Streets Fund to deliver major public realm transformation including a new box park style offer, event space and new car park
  - the proposed development of a new Learning Quarter involving co location of Library, Adult Education and College provision facilitated by multiple funding sources including a grant of £20m from Levelling Up Fund Round 1 and £5m from Towns Fund,
  - Residential provision in the Canalside Quarter (including at Horseley Fields and Brewers Yard), and enhancements to the Springfield campus.
  - The ambitious 'Wolverhampton Investment Prospectus' was launched in May 2022 at the UK Real Estate, Investment & Infrastructure Forum.

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<sup>21</sup> <https://www.investwolverhampton.com/wolverhampton-vision/index.htm>

**Figure 3.1: Wolverhampton: Distribution of Town Centre Uses (2022)**



Source: Goad Survey: January 2022

3.15 In relation to **major retailers** in 2020 Wolverhampton City Centre accommodated 19 of the largest major retailers, which was considered to be a strong representation. The 2022 Goad survey shows that the centre has retained 17 of these retailers. The closures (Carphone Warehouse and House of Fraser) were both previously known and explained in the 2021 Health Check report, resulting from national closures. Wolverhampton has performed well to retain the remaining national multiples, even though several of these are in the St John's Retail Park.



**Table 3.3: Wolverhampton Experian Goad list of Major Comparison Retailers**

<b>Retailer</b>	<b>July 2020</b>	<b>Jan 2022</b>
Argos	No*	No
Boots the Chemist	Yes	Yes
Burton	No	No
Carphone Warehouse	Yes**	No
Clarks	Yes	Yes
Clintons	Yes	Yes
Debenhams	No	No
Dorothy Perkins	No	No
EE	Yes	Yes
H&M	Yes	Yes
HMV	Yes	Yes
House of Fraser	Yes***	<b>No</b>
John Lewis	No	No
Marks & Spencer	Yes	Yes
Monsoon	No	No
New Look	Yes	Yes
Next	Yes	Yes
O2	Yes	Yes
Primark	Yes	Yes
River Island	Yes	Yes
Sainsbury's	Yes	Yes
Superdrug	Yes	Yes
Tesco Extra	No	No
TK Maxx	No	No
Topman	No	No
Topshop	No	No
Vodafone	Yes	Yes
Waitrose	No	No
Waterstones	Yes	Yes
WHSmith	No	No
Wilkinson's	Yes	Yes
<b>Total</b>	<b>19</b>	<b>17</b>

Notes:

\* Argos has relocated into Sainsbury's St Mark's store outside the city centre's primary shopping area.

\*\* Carphone Warehouse closed since the July 2020 survey and has moved into the Currys PC World store.

\*\*\* House of Fraser has been subject to takeover and a national consolidation following the July 2020 survey. However, in April 2021 Wolverhampton was chosen for their first store under the new 'Frasers' brand.

Source: Goad Surveys: July 2020 & January 2022

### **City of Wolverhampton Council: Bilston Town Centre**

3.16 The new Goad Category Report for Bilston was based on a survey undertaken in September 2021. The most recent Goad survey shows that the centre has lost 7 outlets in the years from 2018-2021, reflecting the Goad mapping being updated to reflect the Bilston High Street public realm and pedestrian linkage improvements. The changes to number of units are split relatively equally across sectors and do not demonstrate significant transitional trends. This is likely to be affected in large part by the Covid-19 pandemic and other national retail trends. Although the total number of outlets declined, the number of vacancies actually reduced between 2018 and 2021 by 3 outlets. Some vacant units are subject to future development proposals – such as the planning permission to rebuild the Lidl Store.

**Table 3.4: Bilston: Change in Number of Outlets & Floorspace 2018-2021**

Category	2018	2018	2021	2021	Change: 2018-2021	
	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)
Convenience	31	14,799	30	15,097	-1	297
Comparison	61	11,789	58	10,368	-3	-1,421
Retail Service	32	3,437	34	3,837	2	399
Leisure Service	42	7,980	40	6,986	-2	-994
Financial and Business Service	14	1,654	14	1,403	0	-251
Vacant	29	3,939	26	3,930	-3	-9
Other Retail	0	0	0	0	0	0
<b>Total</b>	<b>209</b>	<b>43,599</b>	<b>202</b>	<b>41,621</b>	<b>-7</b>	<b>-1979</b>

Source: GOAD Category Reports: 03/05/2018 and 01/09/2021

- 3.17 In terms of national multiples the 2018 Goad survey had recorded 46 national multiples in the centre. The 2021 survey reveals 42 national multiples being present.
- 3.18 A comparison of the number of outlets against the national average shows Bilston has a broadly similar mix of sectors. Bilston does have notably more convenience outlets than average and much more convenience floorspace. This is likely due to its important role as a local service centre, and the floorspace figure reflects the Bilston Market, Lidl and large Morrisons store within the Goad survey area.

**Table 3.5: Bilston: Diversity of Uses of Uses Against National Average**

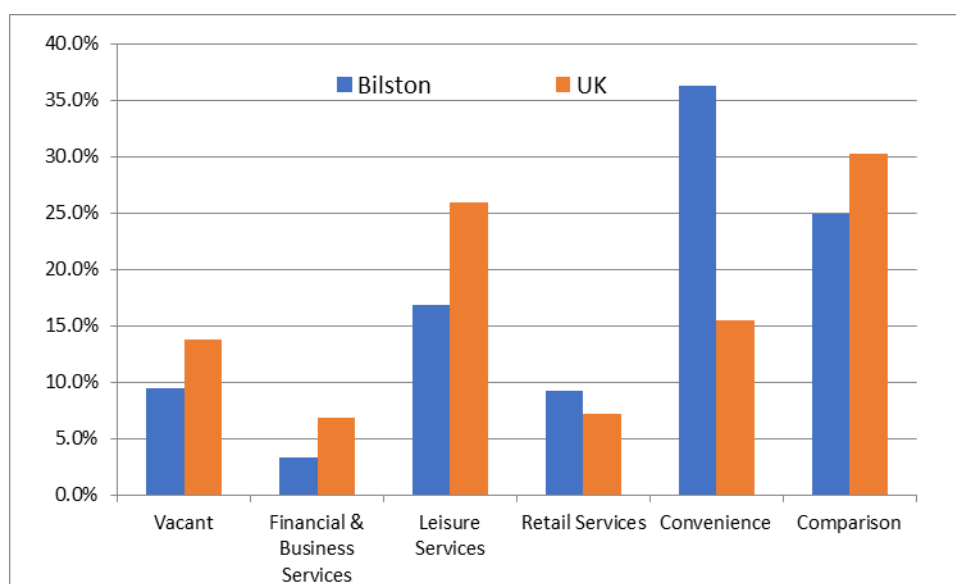
CENTRE	% of Total Outlets			% of Total Floorspace		
	Category	No. Outlets	%	UK Average	Floorspace Sqm	%
Convenience	30	14.85%	9.29%	15,097	36.27%	15.48%
Comparison	58	28.71%	26.93%	10,368	24.91%	30.18%
Retail Service	34	16.83%	15.75%	3,837	9.22%	7.22%
Leisure Service	40	19.80%	25.19%	6,986	16.79%	26.07%
Financial and Business Service	14	6.93%	8.82%	1,403	3.37%	6.65%
Vacant	26	12.87%	13.82%	3,930	9.44%	13.81%
Other Retail	0	0.00%	0.07%	0	0.00%	0.04%
<b>Total</b>	<b>202</b>	<b>100%</b>	<b>100%</b>	<b>41,621</b>	<b>100%</b>	<b>99%</b>

Source: GOAD Category Report Date: 01/09/2021

Experian UK average as at 2022

- 3.19 The floorspace figures also show that Bilston has a comparatively smaller floorspace provision for: comparison goods, leisure and financial & business services.

**Figure 3.2: Bilston: Floorspace Comparison with UK Average (%)**



- 3.20 When compared against the 2018 data there are few changes. Although Bilston lost 3 comparison outlets, the UK average in this sector has declined to a much greater degree, from around 30% to 25% whilst Bilston has remained relatively constant. In fact it is now slightly above the national average for this sector, whereas it was previously slightly below. This is a good performance for a centre the size of Bilston and given national trends in the last three years. On other sectors Bilston has maintained a largely similar position to 2018.
- 3.21 When looking at floorspace comparisons we see that the situation is largely similar to 2018 across all sectors. Bilston is slightly below the national average in the comparison sector in terms of floorspace although slightly above in terms of outlets numbers. This is due to the centre having smaller outlets rather than larger outlets. The vacancy rate was slightly ahead of the national average in 2018 and is now slightly behind it, in terms of outlet numbers. In floorspace terms, it had slightly less vacant floorspace than the UK average in 2018 and now has significantly less. Again, this is another indication of a relatively strong performance over the preceding 3 years.
- 3.22 The distribution of town centre uses shows a typical linear arrangement and does not differ significantly from the situation described in the previous healthcheck.
- 3.23 In addition to the delivery of public realm and accessibility linkages from the High Street towards Bilston Urban Village, there are proposals for a new technical centre at City of Wolverhampton College's nearby Bilston campus that is being facilitated by funding from the West Midlands Combined Authority and Black Country LEP, and making major enhancements to Bilston Market, through funding streams including the Wolverhampton Town Deal.

**Figure 3.3: Bilston: Distribution of Town Centre Uses (2021)**



Source: Goad Survey: September 2021

### **City of Wolverhampton Council: Wednesfield Town Centre**

- 3.24 A new Category Goad Report was published for Wednesfield in September 2021. The previous Health Check report drew from Goad information published for which the survey was undertaken on 31/10/2017.
- 3.25 The most recent Goad survey shows that there has been very little change in the centre for the period 2017-21. Numbers have only changed by one or two outlets in each sector, if at all. The centre has lost only 1 outlet overall and reduced the number of vacancies by two outlets. Correspondingly, the floorspace by sector has changed marginally.

**Table 3.6: Wednesfield: Recent Change in Number of Outlets & Floorspace 2017-2021**

Category	2017	2017	2021	2021	Change: 2017-2021	
	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)
Convenience	12	2,016	11	1,756	-1	-260
Comparison	15	1,997	15	2,471	0	474
Retail Service	15	1,226	16	1,459	1	232
Leisure Service	13	1,997	15	1,997	2	0
Financial and Business Service	7	1,087	6	929	-1	-158
Vacant	11	1,236	9	753	-2	-483
Other Retail	0	0	0	0	0	0
<b>Total</b>	<b>73</b>	<b>9,560</b>	<b>72</b>	<b>9,365</b>	<b>-1</b>	<b>-195</b>

Source: Dates of GOAD Category Reports: 31/10/2017 and 14/12/2021

- 3.26 In terms of national multiples, the 2017 Goad survey recorded 25 national multiples in the centre. The 2021 survey revealed that this number had fallen to 19, indicating a degree of change underneath the headline sector figures.
- 3.27 Comparing the number of outlets with the national average indicates that Wednesfield has slightly fewer comparison outlets and more convenience and retail service outlets. This is to be expected of a smaller centre such as this which performs an important local service function. Therefore, Wednesfield is shown to be a well-balanced centre with a good mix of uses that is not far from the national average.

**Table 3.7: Wednesfield: Diversity of Uses of Uses Against National Average**

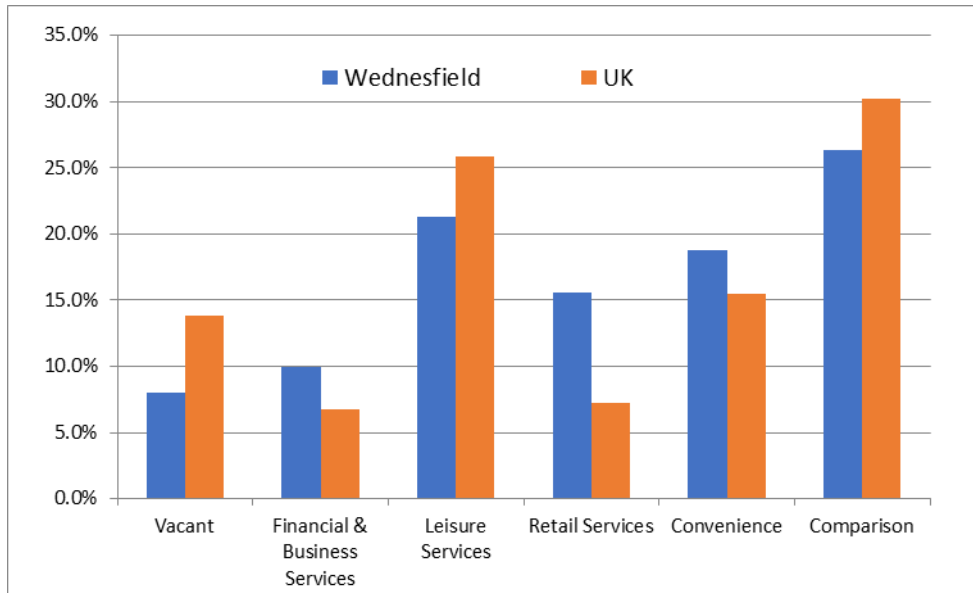
CENTRE Category	% of Total Outlets			% of Total Floorspace		
	No. Outlets	%	UK Average	Floorspace Sqm	%	UK Average
Convenience	11	15.28%	9.29%	1,756	18.75%	15.48%
Comparison	15	20.83%	26.93%	2,471	26.39%	30.18%
Retail Service	16	22.22%	15.75%	1,459	15.58%	7.22%
Leisure Service	15	20.83%	25.19%	1,997	21.33%	26.07%
Financial and Business Service	6	8.33%	8.82%	929	9.92%	6.65%
Vacant	9	12.50%	13.82%	753	8.04%	13.81%
Other Retail	0	0.00%	0.07%	0	0.00%	0.04%
<b>Total</b>	<b>72</b>	<b>100%</b>	<b>100%</b>	<b>9,365</b>	<b>100%</b>	<b>99%</b>

Source: GOAD Category Report Date: 14/12/2021

Experian UK average as at 2022

3.28 Similar trends are seen when looking at floorspace. It is notable that Wednesfield has a lower vacancy rate than the national average and this point is more pronounced when considered in terms of floorspace. This all indicates that Wednesfield has performed relatively well over the last four years.

**Figure 3.4: Wednesfield: Floorspace Comparison with UK Average (%)**



Source: Goad Category Report, December 2021

- 3.29 The distribution of town centre uses shows a typical linear arrangement and does not differ significantly from the situation described in the previous healthcheck.
- 3.30 Interventions through the Wolverhampton Towns Fund aims to improve Wednesfield High Street by providing environmental enhancements to the public realm, shop fronts and market. The aim is to encourage increased footfall, linked trips and increased dwell-time with improved seating areas which will increase spend per head in the locality. The project budget from the Towns Fund allocation is £3.3 million.
- 3.31 The project also seeks to improve the quality of the current canal-side environment between Wolverhampton city centre Interchange and Wednesfield, which is an underused asset for recreation and local transport. Improvements to the pedestrian and cycle environment will enhance the uptake of active modes of travel between the city centre and Wednesfield town centre, as well as encouraging visitors to Wednesfield town centre through providing improved connections between residential areas and the high street. This will ultimately improve the quality of life of all users.

**Figure 3.5: Wednesfield: Distribution of Town Centre Uses (2021)**



Source: Goad Survey: December 2021

### **Dudley MBC: Brierley Hill**

3.32 This centre incorporates both the traditional High Street and Merry Hill Shopping Centre.

#### **Brierley Hill –Traditional Centre**

3.33 Brierley Hill is located to the south west of Dudley. The analysis of the current retail offer was undertaken by the Council in May 2022 which provided floorspace and outlet data based on the previously defined Goad spatial boundary.

3.34 The table shows the trends in relation to current outlets and floorspace. Currently, comparison and leisure services have the highest representation in terms of floorspace. Convenience goods floorspace is approximately double the UK average whilst comparison goods floorspace is approximately half the proportion the UK average. The floorspace quantum for the retail and leisure service sectors is broadly similar to the UK average. However, the financial and business service sector floorspace is considerably lower than UK average (1.74% v/s 6.65% nationally).

**Table 3.8: Brierley Hill: Diversity of Uses Against National Average**

CENTRE	% of Total Outlets			% of Total Floorspace		
Category	No. Outlets	%	UK Average	Floorspace Sqm	%	UK Average
Convenience	25	14.12%	9.29%	12,530	29.80%	15.48%
Comparison	40	22.60%	26.93%	7,350	17.48%	30.18%
Retail Service	29	16.38%	15.75%	2,760	6.56%	7.22%
Leisure Service	45	25.42%	25.19%	13,510	32.13%	26.07%
Financial and Business Service	11	6.21%	8.82%	730	1.74%	6.65%
Vacant	27	15.25%	13.82%	5,170	12.29%	13.81%
Other Retail	0	0.00%	0.07%	0	0.00%	0.04%
<b>Total</b>	<b>177</b>	<b>100%</b>	<b>100%</b>	<b>42,050</b>	<b>100%</b>	<b>100%</b>

Source: Council Data October 2022

Experian UK average as at 2022

- 3.35 In terms of outlets, convenience and comparison goods and vacant units are above the UK average.
- 3.36 Since 2018, there has been an overall reduction of 3 outlets mostly from comparison retail (some 4 outlets, and a floorspace reduction of some 2,358 sqm). There has been no reduction from 2018 in terms of financial and business services, although decreasing in 2020 to 8 units before increasing back in 2022 to 11 units.

**Table 3.9: Brierley Hill: Change in Number of Outlets & Floorspace 2018-2022**

Category	2018	2018	2020	2020	2022	2022
	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)
Convenience	23	9,708	21	9,634	25	12,530
Comparison	44	9,708	44	10,944	40	7,350
Retail Service	23	2,434	27	2,341	29	2,760
Leisure Service	43	13,815	37	12,867	45	13,510
Financial and Business Service	11	1,496	8	576	11	730
Vacant	36	5,268	42	6,373	27	5,170
Other Retail	0	0	0	0	0	0
<b>Total</b>	<b>180</b>	<b>42,429</b>	<b>179</b>	<b>42,735</b>	<b>177</b>	<b>42,050</b>



Category	Change: 2018 -2020		Change: 2020 -22		Change: 2018 -2022	
	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)
Convenience	-2	-74	4	2,896	2	2,822
Comparison	0	1,236	-4	-3,594	-4	-2,358
Retail Service	4	-93	2	419	6	326
Leisure Service	-6	-948	8	643	2	-305
Financial and Business Service	-3	-920	3	154	0	-766
Vacant	6	1,106	-15	-1,203	-9	-98
Other Retail	0	0	0	0	0	0
<b>Total</b>	<b>-1</b>	<b>307</b>	<b>-2</b>	<b>-685</b>	<b>-3</b>	<b>-379</b>

3.37 Brierley Hill benefits from a raft of planned improvements as part of the following two awards:

- Brierley Hill High Street Heritage Action Zone - £1.8m from Historic England for improvements to the historic areas of the public realm; physical interventions to historic buildings in the high street and for cultural events showcasing the High Street's businesses, culture and rich history
- Future High Street Fund – awarded £10million from the Future High Streets Fund. This will finance key transformation works in Brierley Hill including improving connectivity and integration with the new Metro terminus linking Brierley Hill to Wednesbury, refurbishments to the library and reopening of the public toilets.

3.38 Overall, these initiatives aim to improve connections to transport, access and the 'look and feel' of the town centre. At the time of authoring this report, this includes creating a link from the High Street to the planned Metro line and plans for more seating, planters, trees, parking and cycling facilities. The proposals also include enhancements to the area around the Brier Rose sculpture and the locally listed drinking fountain as well as St Mary's Church.

### **Dudley MBC: Merry Hill**

3.39 Merry Hill is one of the largest shopping centres in the UK. It is a popular destination for shoppers in the West Midlands and beyond, offering a vast range of shops, food and beverage offer as well as leisure activities under one roof.

3.40 The latest available data for Merry Hill was obtained from Experian Goad Category Report, survey dated August 2022. The centre has a total 292 outlets with an overall floorspace of 154,414 sqm. Almost half (46.92%) of all outlets are for comparison goods (137 outlets) which is well above the UK average of 26.93% this is by virtue of its status as a

purpose built shopping centre with a predominance for this type of retailing. Comparison goods retail floorspace represents 64% of the overall floorspace in Merry Hill which is over double the UK average (30.18%).

**Table 3.10: Merry Hill: Diversity of Uses Against National Average**

Merry Hill Category	% of Total Outlets			% of Total Floorspace		
	No. Outlets	%	UK Average	Floorspace Sqm	%	UK Average
Convenience	14	4.79%	9.29%	9,708	6.29%	15.48%
Comparison	137	46.92%	26.93%	98,923	64.06%	30.18%
Retail Service	25	8.56%	15.75%	2,062	1.34%	7.22%
Leisure Service	44	15.07%	25.19%	11,102	7.19%	26.07%
Financial and Business Service	9	3.08%	8.82%	1,988	1.29%	6.65%
Vacant	63	21.58%	13.82%	30,630	19.84%	13.81%
Other Retail	0	0.00%	0.07%	0	0.00%	0.04%
<b>Total</b>	<b>292</b>	<b>100%</b>	<b>100%</b>	<b>154,414</b>	<b>100%</b>	<b>100%</b>

Source: Experian Goad August 2022

- 3.41 The proportion of vacant outlets (63) and floorspace (30,630 sqm) in the centre represents almost a fifth of both outlets (21.58%) and floorspace (19.84%).
- 3.42 There are also 14 convenience goods outlets which equates to 4.79% of the overall outlets and below the UK average of 9.29%.
- 3.43 With reference to floorspace, retail service is almost half the UK average (1.34% compared to 7.22%) and leisure services is also below average (7.19% compared to 26.07%). Convenience goods retail and leisure services occupy approximately 13.5% of the floorspace combined and are both well below the UK average (approximately 42% combined).
- 3.44 Since 2018, there has been an overall reduction of 6 outlets the majority, as would be expected, from the comparison goods sector (20 units, 9,327 sqm).
- 3.45 The data indicates a steady increase in number of vacant outlets (23 outlets between 2018 and 2022) and floorspace (+8,306 sqm between 2018 and 2022) reflecting the structural changes in this sector.

**Table 3.11: Merry Hill: Change in Number of Outlets & Floorspace 2018-2022**

Category	2018	2018	2020	2020	2022	2022
	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)
Convenience	11	7,516	11	10,489	14	9,708
Comparison	157	108,251	151	110,582	137	98,923
Retail Service	28	3,066	29	2,555	25	2,062
Leisure Service	49	11,381	44	10,461	44	11,102
Financial and Business Service	13	2,453	12	2,518	9	1,988
Vacant	40	22,325	47	18,228	63	30,630
Other Retail	0	0	0	0	0	0
<b>Total</b>	<b>298</b>	<b>154,990</b>	<b>294</b>	<b>154,833</b>	<b>292</b>	<b>154,414</b>

Source: Experian GOAD 20/04/18 and 23/05/20 and 01/08/22

Category	Change: 2018 -2020		Change: 2020 -22		Change: 2018 -2022	
	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)
Convenience	0	2,973	3	-781	3	2,193
Comparison	-6	2,331	-14	-11,659	-20	-9,327
Retail Service	1	-511	-4	-493	-3	-1,003
Leisure Service	-5	-920	0	641	-5	-279
Financial and Business Service	-1	65	-3	-530	-4	-465
Vacant	7	-4,097	16	12,402	23	8,306
Other Retail	0	0	0	0	0	0
<b>Total</b>	<b>-4</b>	<b>-157</b>	<b>-2</b>	<b>-419</b>	<b>-6</b>	<b>-576</b>

### Dudley MBC: Dudley

3.46 The analysis of the current provision offer was undertaken by the Council in June 2022 which provided floorspace and outlet data based on the previously defined Goad spatial boundary. The analysis shows:

- The centre has a total of 351 outlets with a combined floorspace of 70,430 sqm – almost half that of Merry Hill (154,414 sqm).
- Comparison goods (93 outlets) account for the highest portion (26.5%), followed by leisure services (70 outlets, 19.94%).
- The centre currently has 64 vacant outlets representing a vacancy rate of 18.23% which is above the UK average of 13.82%.
- In relation to floorspace, comparison goods also occupies the highest proportion (37.16%; 26,170 sqm) which is again higher than the UK average (30.18%).

- The proportion of leisure service floorspace (16.54%) is substantially lower when benchmarked against the national average (26.07%).

**Table 3.12: Dudley: Diversity of Uses Against National Average**

Dudley Category	% of Total Outlets			% of Total Floorspace		
	No. Outlets	%	UK Average	Floorspace Sqm	%	UK Average
Convenience	36	10.26%	9.29%	10,150	14.41%	15.48%
Comparison	93	26.50%	26.93%	26,170	37.16%	30.18%
Retail Service	49	13.96%	15.75%	3,820	5.42%	7.22%
Leisure Service	70	19.94%	25.19%	11,650	16.54%	26.07%
Financial and Business Service	39	11.11%	8.82%	5,590	7.94%	6.65%
Vacant	64	18.23%	13.82%	13,050	18.53%	13.81%
Other Retail	0	0.00%	0.07%	0	0.00%	0.04%
<b>Total</b>	<b>351</b>	<b>100%</b>	<b>100%</b>	<b>70,430</b>	<b>100%</b>	<b>100%</b>

3.47 Since 2018 the following key changes are observed:

- The financial and business sector experienced the most significant change, with a reduction of 12 outlets and loss of 4,360 sqm in floorspace - almost half of that in 2018.
- Although comparison goods outlets decreased by 5 outlets, there was a total reduction in floorspace of 3,420 sqm.
- Vacancies experienced an increase to a total of 13,050 sqm in 2022 up by 3,435 sqm from 2018.

**Table 3.13: Dudley: Change in Number of Outlets & Floorspace 2018-2022**

Category	2018	2018	2022	2022	Change: 2018-2022	
	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)
Convenience	37	10,201	36	10,150	-1	-51
Comparison	98	29,590	93	26,170	-5	-3,420
Retail Service	42	4,125	49	3,820	7	-305
Leisure Service	72	11,362	70	11,650	-2	288
Financial and Business Service	51	9,950	39	5,590	-12	-4,360
Vacant	62	9,615	64	13,050	2	3,435
Other Retail	0	0	0	0	0	0
<b>Total</b>	<b>362</b>	<b>74,843</b>	<b>351</b>	<b>70,430</b>	<b>-11</b>	<b>-4413</b>

Source: Dates of GOAD Category Reports: 16/03/2018 and Council Data October 2022

## Dudley MBC: Stourbridge

3.48 The latest available data for Stourbridge was obtained from the Council in May 2022 based on the previously defined Goad spatial boundary. It details the following:

- The centre has a total of 277 outlets and an overall floorspace quantum of 63,160 sqm.

**Table 3.14: Stourbridge: Diversity of Uses Against National Average**

Stourbridge Category	% of Total Outlets			% of Total Floorspace		
	No. Outlets	%	UK Average	Floorspace Sqm	%	UK Average
Convenience	22	7.94%	9.29%	11,750	18.60%	15.48%
Comparison	74	26.71%	26.93%	19,230	30.45%	30.18%
Retail Service	58	20.94%	15.75%	4,970	7.87%	7.22%
Leisure Service	45	16.25%	25.19%	15,390	24.37%	26.07%
Financial and Business Service	32	11.55%	8.82%	5,780	9.15%	6.65%
Vacant	46	16.61%	13.82%	6,040	9.56%	13.81%
Other Retail	0	0.00%	0.07%	0	0.00%	0.04%
<b>Total</b>	<b>277</b>	<b>100%</b>	<b>100%</b>	<b>63,160</b>	<b>100%</b>	<b>100%</b>

- Comparison goods represent the highest proportion both in terms of outlets (74 outlets; 26.71%) and floorspace (19,230 sqm; 30.45%).
- There are 22 convenience goods outlets (7.94% of the total) representing almost a fifth (18.6%) of the overall floorspace.
- Retail service has the second highest number of outlets (58) though accounting for only 7.9% of the floorspace (4,970 sqm) in the centre.
- The proportion of Leisure Service floorspace (15,390 sqm) accounts for around 25% of the overall space and is similar to the UK average (26%).
- Financial and business services have a higher proportion of outlets (11.55%; national average 8.82%) and floorspace (9.15%; national average 6.65%).
- There are 46 vacant outlets representing a vacancy rate of 16.61% which is higher than the national average of 13.82%.

3.49 Since 2018 the following key changes are observed:

- Comparison goods outlets decreased by 16 (from 90 to 74), with a corresponding reduction in floorspace by some 1,822 sqm.
- Convenience goods has seen a nominal change with outlets decreased marginally by 3 (from 25 to 22).
- Retail service outlets showed the highest increase with an addition of 11 (from 47 to 58).

- Leisure service also experienced substantial change with a decrease in 12 outlets (from 57 to 45) and reduction in floorspace of some 2,243 sqm.
- The proportion of vacant outlets and floorspace almost doubled in outlets from 25 to 46 outlets and floorspace from 3,698 sqm to 6,040 sqm.

**Table 3.15: Stourbridge: Change in Number of Outlets & Floorspace 2018-2022**

Category	2018	2018	2022	2022	Change: 2018-2022	
	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)
Convenience	25	11,734	22	11,750	-3	16
Comparison	90	21,052	74	19,230	-16	-1,822
Retail Service	47	4,459	58	4,970	11	511
Leisure Service	57	17,633	45	15,390	-12	-2,243
Financial and Business Service	36	5,769	32	5,780	-4	11
Vacant	25	3,698	46	6,040	21	2,342
Other Retail	0	0	0	0	0	0
<b>Total</b>	<b>280</b>	<b>64,345</b>	<b>277</b>	<b>63,160</b>	<b>-3</b>	<b>-1,185</b>

### **Dudley MBC: Halesowen**

3.50 The latest available data for Halesowen surveyed by the Council in June 2022 based on the previously defined Goad spatial boundary. It details the following:

- There are a total of 151 outlets in the centre which occupy 31,159 sqm in floorspace.
- Comparison goods outlets represent a third of all outlets (44 outlets; 29.14%).
- In terms of floorspace, both comparison (32.90%) and convenience goods (32.29%) collectively account for two thirds across the centre and substantially above the (collective) national average total across both goods types of 45.66%
- The centre has 23 leisure service outlets (15.23%) and 3,450 sqm of floorspace (around 11%), which is considerably lower than the UK average for both outlets (25.19%) and floorspace (around 26%). Retail and financial and business services have the lowest amount of floorspace (2,120 sqm and 2,859 sqm respectively).
- The proportion of vacant outlets is marginally above the national average (14.57% to 13.82% nationally).

**Table 3.16: Halesowen: Diversity of Uses Against National Average**

Halesowen Category	% of Total Outlets			% of Total Floorspace		
	No. Outlets	%	UK Average	Floorspace Sqm	%	UK Average
Convenience	11	7.28%	9.29%	10,060	32.29%	15.48%
Comparison	44	29.14%	26.93%	10,250	32.90%	30.18%
Retail Service	28	18.54%	15.75%	2,120	6.80%	7.22%
Leisure Service	23	15.23%	25.19%	3,450	11.07%	26.07%
Financial and Business Service	23	15.23%	8.82%	2,859	9.18%	6.65%
Vacant	22	14.57%	13.82%	2,420	7.77%	13.81%
Other Retail	0	0.00%	0.07%	0	0.00%	0.04%
<b>Total</b>	<b>151</b>	<b>100%</b>	<b>100%</b>	<b>31,159</b>	<b>100%</b>	<b>100%</b>

Source: Council Data October 2022

Experian UK average as at 2022

3.51 Since 2018 the following key changes are observed:

- Overall, within the centre the number of outlets decreased by 11 but with a corresponding nominal reduction in floorspace of 456 sqm.

**Table 3.17: Halesowen: Change in Number of Outlets & Floorspace 2018-2022**

Category	2018	2018	2022	2022	Change: 2018-2022	
	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)
Convenience	12	10,154	11	10,060	-1	-94
Comparison	52	9,504	44	10,250	-8	746
Retail Service	27	1,905	28	2,120	1	215
Leisure Service	26	3,642	23	3,450	-3	-192
Financial and Business Service	23	3,066	23	2,859	0	-207
Vacant	22	3,345	22	2,420	0	-925
Other Retail	0	0	0	0	0	0
<b>Total</b>	<b>162</b>	<b>31,615</b>	<b>151</b>	<b>31,159</b>	<b>-11</b>	<b>-456</b>

Source: Dates of GOAD Category Reports: 23/02/2018 and Council Data October 2022

- Overall, there has been no significant change in outlet numbers or floorspace in the centre since 2018 except for comparison goods which saw a reduction by 8 outlets but an increase in overall floorspace.
- Although there was no overall change in the number of vacant outlets there was a reduction in floorspace by 925 sqm.

## Sandwell MBC: West Bromwich

3.52 West Bromwich is the largest town in Sandwell MBC area and is home to a range of amenities, including shopping centres, parks, and cultural attractions. The town centre also features a number of shopping areas, including Queens Square, Kings Square, Astle Park and New Square, which offer a range of shops, restaurants, and cafes. West Bromwich Indoor Market is located off the High Street in Kings Square.

3.53 The latest available Experian Goad data for West Bromwich (March 2022) details the following:

- There are a total of 384 outlets, a third of which are for comparison goods (129 outlets). There is good convenience provision especially in terms of floorspace dominated by the large Tesco Extra.
- Over the period 2018 to 2022, there has been an overall increase of 6 outlets with a total increase of 2,350 sqm of floorspace.
- Comparison goods and retail services both showed an increase of 7 outlets respectively. Retail services witnessed the highest increase in floorspace of 1,644 sqm since 2018.
- Leisure services has the second highest number of outlets (64) accounting for 16.7% of total outlets.

**Table 3.18: West Bromwich: Change in Number of Outlets & Floorspace 2018-2022**

Category	2018	2018	2020	2020	2022	2022
	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)
Convenience	38	21,108	37	21,126	37	21,535
Comparison	122	40,199	124	41,788	129	41,342
Retail Service	44	4,376	51	6,317	51	6,020
Leisure Service	63	15,190	66	17,494	64	15,924
Financial and Business Service	38	8,306	36	7,683	35	7,562
Vacant	72	20,699	68	19,798	68	19,928
Other Retail	1	84	0	0	0	0
<b>Total</b>	<b>378</b>	<b>109,960</b>	<b>382</b>	<b>114,206</b>	<b>384</b>	<b>112,311</b>

Source: Dates of GOAD Category Reports 31/08/2018; 29/09/2020 and 24/03/2022



Category	Change: 2018 -2020		Change: 2020 -22		Change: 2018 -2022	
	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)
Convenience	-1	19	0	409	-1	427
Comparison	2	1,589	5	-446	7	1,143
Retail Service	7	1,942	0	-297	7	1,644
Leisure Service	3	2,304	-2	-1,570	1	734
Financial and Business Service	-2	-622	-1	-121	-3	-743
Vacant	-4	-901	0	130	-4	-771
Other Retail	-1	-84	0	0	-1	-84
<b>Total</b>	<b>4</b>	<b>4,246</b>	<b>2</b>	<b>-1895</b>	<b>6</b>	<b>2,350</b>

- In terms of floorspace of the 112,311 sqm total across the centre; over a third (41,342 sqm) is devoted to comparison goods. Financial and business services floorspace has diminished the most over the four years by some 743 sqm.

**Table 3.19: West Bromwich: Diversity of Uses Against National Average**

CENTRE Category	% of Total Outlets			% of Total Floorspace		
	No. Outlets	%	UK Average	Floorspace Sqm	%	UK Average
Convenience	37	9.64%	9.29%	21,535	19.17%	15.48%
Comparison	129	33.59%	26.93%	41,342	36.81%	30.18%
Retail Service	51	13.28%	15.75%	6,020	5.36%	7.22%
Leisure Service	64	16.67%	25.19%	15,924	14.18%	26.07%
Financial and Business Service	35	9.11%	8.82%	7,562	6.73%	6.65%
Vacant	68	17.71%	13.82%	19,928	17.74%	13.81%
Other Retail	0	0.00%	0.07%	0	0.00%	0.04%
<b>Total</b>	<b>384</b>	<b>100%</b>	<b>100%</b>	<b>112,311</b>	<b>100%</b>	<b>100%</b>

Source: GOAD Category Report Date: 24/03/2022

Experian UK average as at 2022

- There are currently 68 vacant outlets representing a vacancy rate of 17.7% which is above the national average of 13.8%. Many of these vacancies continue to remain within the Queen's Square Centre.
- The distribution of town centre uses does not differ significantly from the situation described in the previous healthcheck. 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.

**Figure 3.6: West Bromwich: Distribution of Town Centre Uses (2022)**



Source: Goad Survey: March 2022

- Prime town centre rents at mid-2022 remain at £269.10/sqm (£25/sq.ft) – same as that reported at the end of 2020. This represents a decrease (28.6%) from £376.74/sqm (£35/sq.ft) at the end of 2018.
- Sandwell Council has successfully secured £25million for West Bromwich as part of the Government's Town's Fund for the borough. The projects are anticipated improve the towns declining retail offer, repurposing surplus accommodation and unlocking large areas of brownfield land for planned regeneration. In February and March 2022, the Government approved the following West Bromwich Town Deal projects<sup>22</sup>:
  - Digital Den (Greets Green Community Enterprise) – located at Woods Lane Community Centre in West Bromwich, this project is supporting children, adults and older people to get online and improve access to jobs.
  - Sandwell Civil and Mechanical Engineering Centre (Sandwell College) – Sandwell MEC will be a new technical campus on West Bromwich High Street, providing opportunities in engineering, advanced manufacturing, civil engineering, construction and hybrid electric vehicles.
  - West Bromwich Urban Greening (Sandwell Council) – improving existing green space and the appearance of the town centre, including new trees, parklets, play space and better links to Sandwell Valley, plus a cultural programme.
  - Town Hall Quarter (Sandwell Council) – the internal and external restoration and renovation of the Grade II-listed West Bromwich Town Hall and Central Library buildings, including a new entrance from West Bromwich High Street. The

<sup>22</sup> Source: Sandwell Council

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investment will transform the Town Hall and Central Library into modern and vibrant facilities, benefitting local people, community groups and third sector organisations.

- Retail Diversification Programme (Sandwell Council) – the delivery of comprehensive regeneration and transformation of West Bromwich town centre. The project includes the relocation and refurbishment of a new indoor market, purchasing and demolition of selected sites to 'kickstart' regeneration opportunities to improve the town's retail offer, deliver new town centre homes and unlock land for planned regeneration.
- West Bromwich Connected (Sandwell Council) – a phased delivery of schemes identified from the Sandwell Cycling and Walking Infrastructure Plan. The project will create new pedestrian links and cycle routes within and to and from the town centre, encouraging more trips to be taken using active travel infrastructure within West Bromwich, across the wider borough and the region. These will assist in reducing congestion, poor air quality, and other health inequalities.
- The six approved West Bromwich Towns Fund projects are anticipated to deliver:
  - 4.5 full-time equivalent jobs
  - 90 temporary jobs
  - 612 learners enrolled onto courses
  - 2 heritage buildings renovated/restored
  - 4 new greenspaces forming one linear park
  - 33 planted trees
  - 11217km of rehabilitated land
  - 7,590km of improved floor space
  - 2km of new cycle ways
  - 2km of new pedestrian paths
  - 2km of resurfaced and improved roads.

### **Sandwell MBC: Blackheath**

3.54 The latest available Experian Goad data for Blackheath (April 2022) details the following:

- The centre in total currently has 166 outlets with a combined floorspace of approximately 30,400 sqm. Since 2018 this represents an increase of 7 units but an overall reduction in floorspace of a marginal 130 sqm.
- The centre currently has 9 vacant outlets showing an improved performance since 2016 when there were 16 vacant outlets.

**Table 3.20: Blackheath: Change in Number of Outlets & Floorspace 2016-2022**

Category	2016	2016	2022	2022	Change: 2016-2022	
	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)
Convenience	17	10,907	20	10,526	3	-381
Comparison	47	7,098	41	7,321	-6	223
Retail Service	30	2,546	40	3,177	10	632
Leisure Service	39	5,407	47	6,355	8	948
Financial and Business Service	10	2,016	9	1,895	-1	-121
Vacant	16	2,555	9	1,124	-7	-1,431
Other Retail	0	0	0	0	0	0
<b>Total</b>	<b>159</b>	<b>30,528</b>	<b>166</b>	<b>30,398</b>	<b>7</b>	<b>-130</b>

Source: Dates of GOAD Category Reports: 10/12/2016 and 11/04/22

- The number of outlets are dominated by leisure service (47), comparison goods (41), and retail service (40). However, in relation to floorspace, convenience has the largest quantum of floorspace with a total of around 10,500 sqm (dominated by the Sainsbury's and Lidl store(s)), with the financial and business service with the lowest amount of floorspace.

**Table 3.21: Blackheath: Diversity of Uses Against National Average**

CENTRE	% of Total Outlets			% of Total Floorspace		
	Category	No. Outlets	%	UK Average	Floorspace Sqm	%
Convenience	20	12.05%	9.29%	10,526	34.63%	15.48%
Comparison	41	24.70%	26.93%	7,321	24.08%	30.18%
Retail Service	40	24.10%	15.75%	3,177	10.45%	7.22%
Leisure Service	47	28.31%	25.19%	6,355	20.90%	26.07%
Financial and Business Service	9	5.42%	8.82%	1,895	6.23%	6.65%
Vacant	9	5.42%	13.82%	1,124	3.70%	13.81%
Other Retail	0	0.00%	0.07%	0	0.00%	0.04%
<b>Total</b>	<b>166</b>	<b>100%</b>	<b>100%</b>	<b>30,398</b>	<b>100%</b>	<b>100%</b>

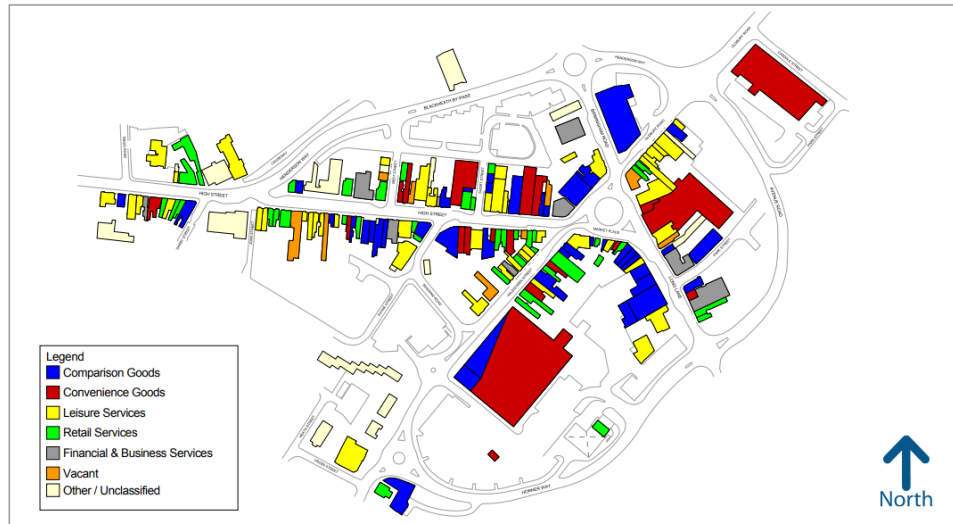
Source: GOAD Category Report Date: 11/04/22

Experian UK average as at 2022

- National multiples account for 30 of the 166 outlets indicating that the centre is primarily independent led. However in terms of floorspace, multiples account for 13,341 sqm or 44% of the total floorspace of 30,398 sqm.

- The distribution of uses below particularly highlights the large floorplates of the convenience stores (Sainsburys and Lidl) as well as Blackheath Market. Retail provision is spread throughout the town centre.

**Figure 3.7: Blackheath: Distribution of Town Centre Uses (2022)**



Source: Goad Survey: March 2022

### **Sandwell MBC: Cradley Heath**

3.55 The latest available Experian Goad data for Cradley Heath (March 2022) details the following:

- The centre in total currently has 126 outlets with a combined floorspace of approximately 24,000 sqm. Since 2018 this represents a marginal decrease of 1 outlet and 700 sqm reduction in floorspace.
- The centre currently has 14 vacant outlets showing an improved performance since 2018 when there were 21 vacant outlets.

**Table 3.22 Cradley Heath: Change in Number of Outlets & Floorspace 2018-2022**

Category	2018	2018	2022	2022	Change: 2018 -2022	
	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)
Convenience	17	11,130	22	11,343	5	214
Comparison	33	3,995	33	5,054	0	1,059
Retail Service	22	1,496	24	1,579	2	84
Leisure Service	27	2,843	25	2,815	-2	-28
Financial and Business Service	7	1,375	8	1,682	1	307
Vacant	21	3,883	14	1,551	-7	-2,332
Other Retail	0	0	0	0	0	0
<b>Total</b>	<b>127</b>	<b>24,722</b>	<b>126</b>	<b>24,025</b>	<b>-1</b>	<b>-697</b>

Source: Dates of GOAD Category Reports: 29/03/2018 and 31/03/22

- The number of outlets are dominated by comparison goods (33). However, in relation to floorspace, convenience has the largest quantum of floorspace with a total of around 11,343 sqm (dominated by the Tesco Extra and Lidl at either end of the High Street), with the financial and business service with the lowest amount of floorspace. Comparison goods floorspace is almost 10% lower than the average, leisure service floorspace is under half the UK average. The composition of vacant floorspace is also half that of the UK average.

**Table 3.23: Cradley Heath: Diversity of Uses Against National Average**

CENTRE	% of Total Outlets			% of Total Floorspace		
	Category	No. Outlets	%	UK Average	Floorspace Sqm	%
Convenience	22	17.46%	9.29%	11,343	47.22%	15.48%
Comparison	33	26.19%	26.93%	5,054	21.04%	30.18%
Retail Service	24	19.05%	15.75%	1,579	6.57%	7.22%
Leisure Service	25	19.84%	25.19%	2,815	11.72%	26.07%
Financial and Business Service	8	6.35%	8.82%	1,682	7.00%	6.65%
Vacant	14	11.11%	13.82%	1,551	6.46%	13.81%
Other Retail	0	0.00%	0.07%	0	0.00%	0.04%
<b>Total</b>	<b>126</b>	<b>100%</b>	<b>100%</b>	<b>24,025</b>	<b>100%</b>	<b>100%</b>

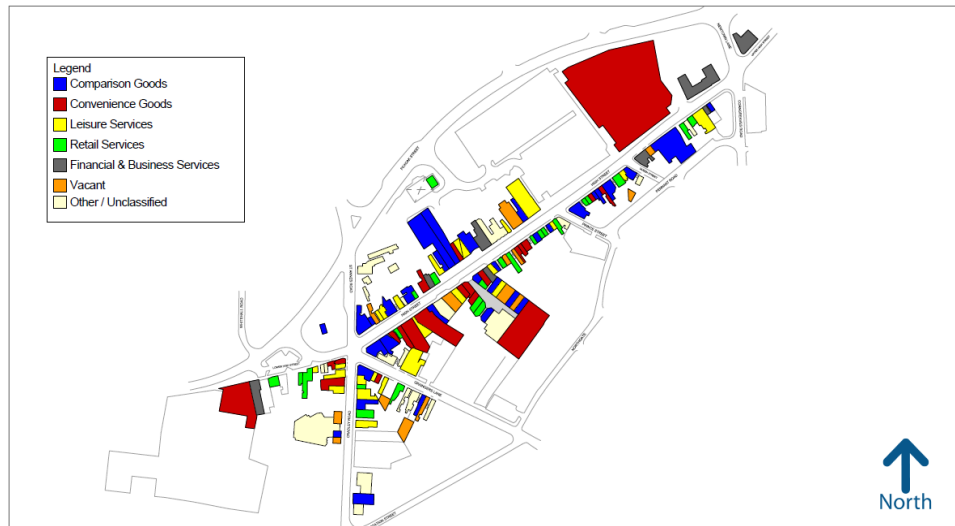
Source: Goad Category Report Date: 31/03/22

Experian UK average as at 2022

- National multiples account for only 10 of the 126 outlets indicating that the centre is primarily independent led. However in terms of floorspace, multiples account for 9,448 sqm or 39% of the total floorspace of 24,025 sqm.

- The distribution of uses below particularly highlights the linear nature of the centre, As with Blackheath the large floorplates of the convenience stores (Sainsburys and Lidl) as well as the Central Market Hall. Retail provision is spread throughout the town centre with a dominance of smaller sized units.

**Figure 3.8: Cradley Heath: Distribution of Town Centre Uses (2022)**



Source: Goad Survey: March 2022

### **Sandwell MBC: Great Bridge**

3.56 The latest available Experian Goad data for Great Bridge (August 2021) details the following:

- The centre in total currently has 87 outlets with a combined floorspace of approximately 13,600 sqm. Since 2018 this represents a marginal increase of 1 outlet and a 260 sqm reduction in terms of floorspace.
- The centre currently has 10 vacant outlets which is an increase to the 7 outlets recorded previously in 2018.

**Table 3.24: Great Bridge: Change in Number of Outlets & Floorspace 2018-2021**

Category	2018	2018	2021	2021	Change: 2018 -2021	
	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)
Convenience	12	2,666	15	2,908	3	242
Comparison	16	3,753	13	3,781	-3	28
Retail Service	20	1,561	19	1,524	-1	-37
Leisure Service	23	2,806	21	2,536	-2	-269
Financial and Business Service	8	1,273	9	1,226	1	-46
Vacant	7	1,774	10	1,598	3	-177
Other Retail	0	0	0	0	0	0
<b>Total</b>	<b>86</b>	<b>13,833</b>	<b>87</b>	<b>13,573</b>	<b>1</b>	<b>-260</b>

Source: Dates of GOAD Category Reports: 29/03/2018 and 19/08/21

- The number of outlets currently are dominated by leisure services (21) followed by retail services (19). However, in relation to floorspace, comparison goods dominates with a total of around 3,800 sqm. Whilst financial and business services has the lowest amount of floorspace (c.1,200 sqm), it is proportionately higher than the national average (9% v/s 6.7% nationally).

**Table 3.25: Great Bridge: Diversity of Uses Against National Average**

CENTRE	% of Total Outlets			% of Total Floorspace		
	Category	No. Outlets	%	UK Average	Floorspace Sqm	%
Convenience	15	17.24%	9.29%	2,908	21.42%	15.48%
Comparison	13	14.94%	26.93%	3,781	27.86%	30.18%
Retail Service	19	21.84%	15.75%	1,524	11.23%	7.22%
Leisure Service	21	24.14%	25.19%	2,536	18.69%	26.07%
Financial and Business Service	9	10.34%	8.82%	1,226	9.03%	6.65%
Vacant	10	11.49%	13.82%	1,598	11.77%	13.81%
Other Retail	0	0.00%	0.07%	0	0.00%	0.04%
<b>Total</b>	<b>87</b>	<b>100%</b>	<b>100%</b>	<b>13,573</b>	<b>100%</b>	<b>100%</b>

Source: GOAD Category Report Date: 19/08/21

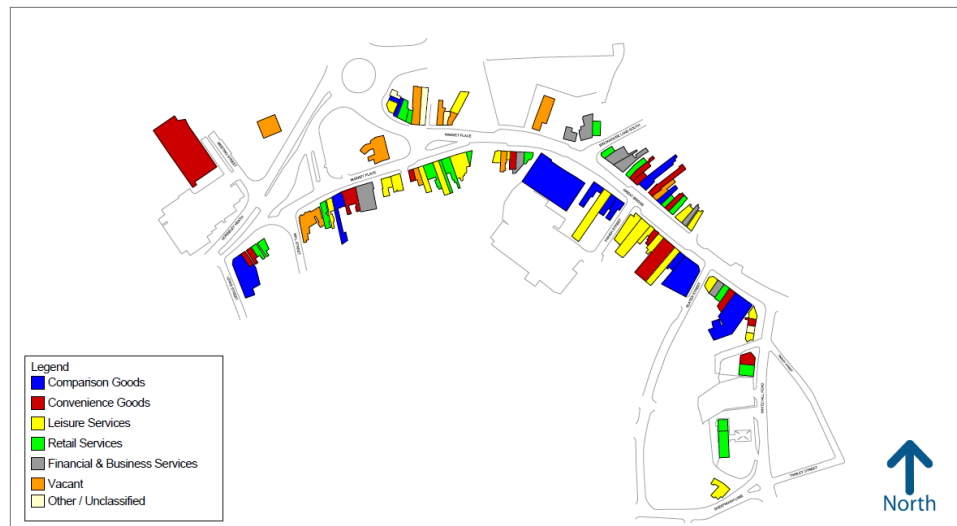
Experian UK average as at 2022

- The proportion of convenience outlets (17.2%) is above the national average (9.3%) whilst proportion of comparison outlets (14.9%) is comparatively less than the national average (26.9%). Proportion of vacant floorspace (11.5%) is also lower than the national average (13.8%). Convenience goods floorspace is around 6% higher and leisure floorspace is approximately 8% lower.



- National multiples account for only 13 of the 87 outlets indicating that the centre is primarily independent led. However in terms of floorspace, multiples account for 4,608 sqm, or over a third, of the total floorspace of 13,573 sqm.
- The distribution of uses below particularly highlights the compact nature of the centre with a broadly even distribution of uses with the Lidl store anchoring the western portion of the centre.

**Figure 3.9: Great Bridge: Distribution of Town Centre Uses (2021)**



Source: Goad Survey: August 2021

### **Sandwell MBC: Oldbury**

3.57 The latest available Experian Goad data for Oldbury (March 2022) details the following:

- The centre in total currently has 95 outlets with a combined floorspace of approximately 25,500 sqm. Since 2016 there has been an increase of 8 outlets and some 2,350 sqm in terms of floorspace. The increase in floorspace is seen across all goods categories except for leisure services.
- The centre currently has 14 vacant outlets which is higher than the 9 reported in 2016.

**Table 3.26: Oldbury: Change in Number of Outlets & Floorspace 2016-2022**

Category	2016	2016	2022	2022	Change: 2016 -2022	
	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)
Convenience	4	10,619	10	10,953	6	334
Comparison	15	2,248	12	2,267	-3	19
Retail Service	22	2,750	22	2,852	0	102
Leisure Service	19	3,382	19	3,270	0	-111
Financial and Business Service	18	2,861	18	3,818	0	957
Vacant	9	1,236	14	2,285	5	1,050
Other Retail	0	0	0	0	0	0
<b>Total</b>	<b>87</b>	<b>23,096</b>	<b>95</b>	<b>25,446</b>	<b>8</b>	<b>2,350</b>

Source: Dates of GOAD Category Reports: 01/12/2016 and 31/03/22

- The number of outlets is dominated by retail services (22). However, in relation to floorspace, convenience goods has the largest quantum of floorspace with a total of around 10,600 sqm (dominated by the Sainsbury's supermarket), with comparison goods having the lowest amount of floorspace.
- The proportion of comparison floorspace (8.9%) is considerably lower than the national average (30.2%); leisure service floorspace is under half the UK average.
- The composition of vacant floorspace is lower than the UK average.

**Table 3.27: Oldbury: Diversity of Uses Against National Average**

CENTRE	% of Total Outlets			% of Total Floorspace		
	Category	No. Outlets	%	UK Average	Floorspace Sqm	%
Convenience	10	10.53%	9.29%	10,953	43.04%	15.48%
Comparison	12	12.63%	26.93%	2,267	8.91%	30.18%
Retail Service	22	23.16%	15.75%	2,852	11.21%	7.22%
Leisure Service	19	20.00%	25.19%	3,270	12.85%	26.07%
Financial and Business Service	18	18.95%	8.82%	3,818	15.01%	6.65%
Vacant	14	14.74%	13.82%	2,285	8.98%	13.81%
Other Retail	0	0.00%	0.07%	0	0.00%	0.04%
<b>Total</b>	<b>95</b>	<b>100%</b>	<b>100%</b>	<b>25,446</b>	<b>100%</b>	<b>100%</b>

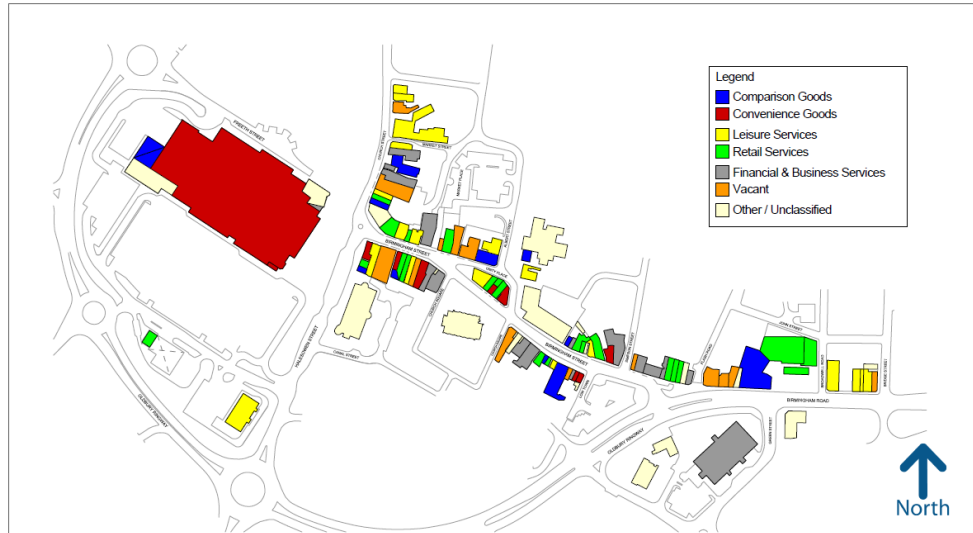
Source: GOAD Category Report Date: 31/03/22

Experian UK average as at 2022

- National multiples account for only 19 of the 95 outlets indicating that the centre is primarily independent led. However in terms of floorspace, multiples account for 12,839 sqm or almost half (50.4%) of the total floorspace of 25,446 sqm.

- There is an even distribution of uses within the compact centre which is dominated by the large Sainsbury's to the west of the centre.

**Figure 3.10: Oldbury: Distribution of Town Centre Uses (2022)**



Source: Goad Survey: March 2022

### **Sandwell MBC: Wednesbury**

3.58 The latest available Experian Goad data for Oldbury (July 2021) details the following:

- The centre in total currently has 178 outlets with a combined floorspace of approximately 34,644 sqm. Since 2017 there has been no change in the number of outlets but in terms of floorspace, this has decreased by 334 sqm.
- The centre currently has 26 vacant outlets which is an improvement to the 27 vacant outlets in 2018

**Table 3.28: Wednesbury: Change in Number of Outlets & Floorspace 2017-2021**

Category	2017	2017	2021	2021	Change: 2017-2021	
	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)
Convenience	21	11,260	21	11,316	0	56
Comparison	51	8,621	49	8,092	-2	-530
Retail Service	35	3,447	33	3,205	-2	-242
Leisure Service	30	5,407	37	6,252	7	845
Financial and Business Service	14	1,719	12	1,050	-2	-669
Vacant	27	4,524	26	4,729	-1	204
Other Retail	0	0	0	0	0	0
<b>Total</b>	<b>178</b>	<b>34,978</b>	<b>178</b>	<b>34,644</b>	<b>0</b>	<b>-334</b>

Source: Dates of GOAD Category Reports: 29/03/2017 and 24/07/2021

- The number of outlets is dominated by comparison goods outlets (49). However, in relation to floorspace, convenience has the largest quantum of floorspace with a total of around 11,300 sqm (dominated by the Morrison's supermarket) with financial and business services having the lowest amount of floorspace.
- The proportion of convenience floorspace (32.7%) is twice the national average (15.5%). Comparison provision by floorspace (23.4%) is lower than the national average (30.2%).
- Vacancy levels by outlets are marginally above the national average (14.6% v/s 13.8%) whilst in terms of floorspace marginally lower (13.7% v/s 13.8%).

**Table 3.29: Wednesbury: Diversity of Uses Against National Average**

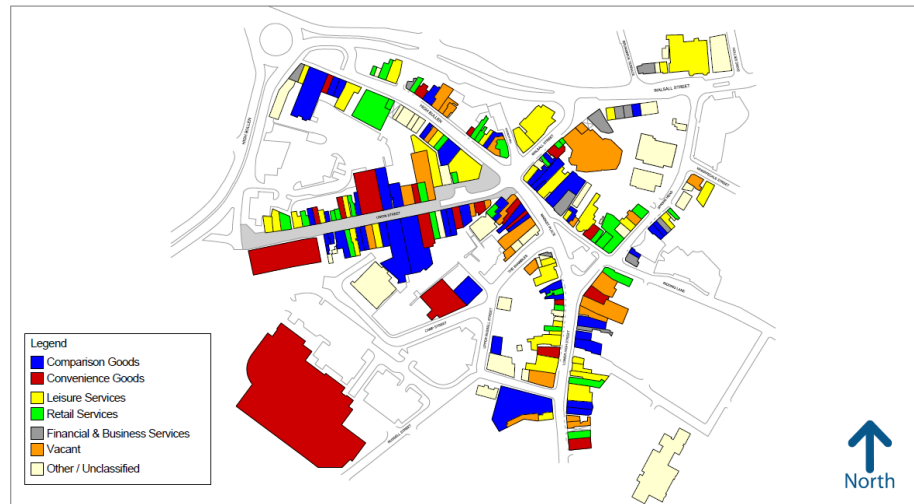
CENTRE	% of Total Outlets			% of Total Floorspace		
	Category	No. Outlets	%	UK Average	Floorspace Sqm	%
Convenience	21	11.80%	9.29%	11,316	32.66%	15.48%
Comparison	49	27.53%	26.93%	8,092	23.36%	30.18%
Retail Service	33	18.54%	15.75%	3,205	9.25%	7.22%
Leisure Service	37	20.79%	25.19%	6,252	18.05%	26.07%
Financial and Business Service	12	6.74%	8.82%	1,050	3.03%	6.65%
Vacant	26	14.61%	13.82%	4,729	13.65%	13.81%
Other Retail	0	0.00%	0.07%	0	0.00%	0.04%
<b>Total</b>	<b>178</b>	<b>100%</b>	<b>100%</b>	<b>34,644</b>	<b>100%</b>	<b>100%</b>

Source: GOAD Category Report Date: 24/07/2021

Experian UK average as at 2022

- National multiples account for only 27 (13%) of the 178 outlets indicating that the centre is primarily independent led. In terms of floorspace, multiples account for 13,471 sqm or 39% of the total floorspace of 34,644 sqm.
- There is an even distribution of across the centre which with the dominance of convenience and comparison to the western portion of the centre.

**Figure 3.11: Wednesbury: Distribution of Town Centre Uses (2021)**



Source: Goad Survey: July 2021

### **Sandwell MBC: Cape Hill**

3.59 The latest available Experian Goad data for Cape Hill (June 2022) details the following:

- The centre in total currently has 217 outlets with a combined floorspace of approximately 38,248 sqm. Since 2017 there has been no change in outlets but a marginal increase in terms of floorspace of 65 sqm.
- The centre currently has 11 vacant outlets which is an improvement to the 16 vacant outlets recorded previously in 2017.

**Table 3.30: Cape Hill: Change in Number of Outlets & Floorspace 2017-2022**

Category	2017	2017	2022	2022	Change: 2017-2022	
	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)
Convenience	42	13,759	46	12,988	4	-771
Comparison	61	12,570	55	13,118	-6	548
Retail Service	41	3,131	47	3,391	6	260
Leisure Service	24	3,019	39	4,301	15	1,282
Financial and Business Service	19	2,165	19	1,905	0	-260
Vacant	16	3,540	11	2,546	-5	-994
Other Retail	0	0	0	0	0	0
<b>Total</b>	<b>203</b>	<b>38,183</b>	<b>217</b>	<b>38,248</b>	<b>14</b>	<b>65</b>

Source: Dates of GOAD Category Reports: 06/04/2017 and 13/06/22

- The number of outlets is dominated by comparison goods outlets (55) as is the floorspace 13,118 sqm closely followed by convenience floorspace of some 12,988 sqm. Financial and business services has the lowest amount of floorspace.
- The proportion of convenience floorspace (34%) is more than double the national average (15.5%). The proportion of comparison floorspace (34.3%) is also higher than the national average 30.2%.
- Vacancy levels by outlets (5.1%) and floorspace (6.7%) are lower than the national average (13.8% respectively).

**Table 3.31: Cape Hill: Diversity of Uses Against National Average**

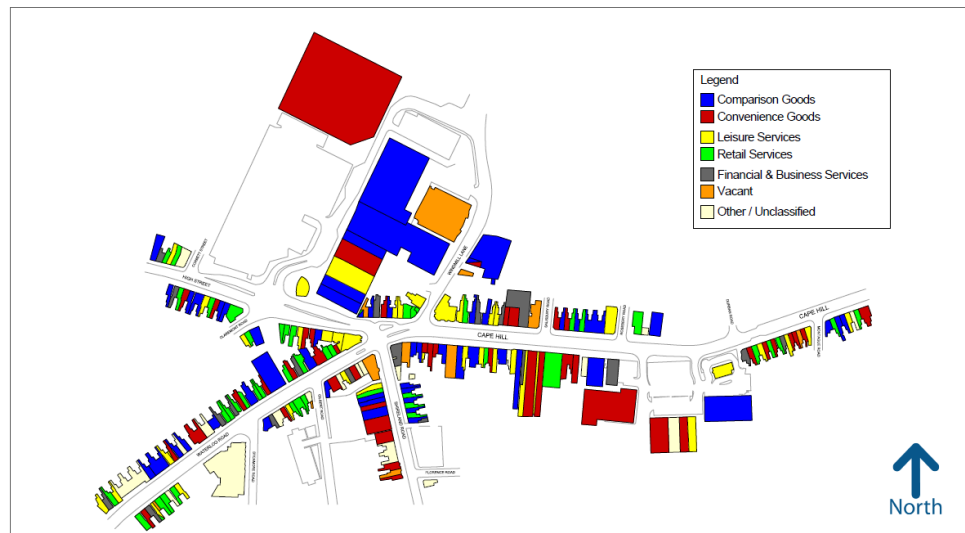
CENTRE	% of Total Outlets			% of Total Floorspace		
	Category	No. Outlets	%	UK Average	Floorspace Sqm	%
Convenience	46	21.20%	9.29%	12,988	33.96%	15.48%
Comparison	55	25.35%	26.93%	13,118	34.30%	30.18%
Retail Service	47	21.66%	15.75%	3,391	8.87%	7.22%
Leisure Service	39	17.97%	25.19%	4,301	11.25%	26.07%
Financial and Business Service	19	8.76%	8.82%	1,905	4.98%	6.65%
Vacant	11	5.07%	13.82%	2,546	6.66%	13.81%
Other Retail	0	0.00%	0.07%	0	0.00%	0.04%
<b>Total</b>	<b>217</b>	<b>100%</b>	<b>100%</b>	<b>38,248</b>	<b>100%</b>	<b>100%</b>

Source: Latest Category Report Date: 13/06/22

Experian UK average as at 2022

- National multiples account for only 9% (20 outlets) of the 217 outlets indicating that the centre is primarily independent led. However in terms of floorspace, multiples account for 16,871 sqm or 44% of the total floorspace of 38,248 sqm.
- There is an even distribution of across the centre which with the dominance of convenience and comparison to the western portion of the centre.

**Figure 3.12: Cape Hill: Distribution of Town Centre Uses (2022)**



Source: Goad Survey: June 2022

### **Sandwell MBC: Bearwood**

- 3.60 The latest available Experian Goad data for Bearwood (June 2022) details the following:
- The centre in total currently has 266 outlets with a combined floorspace of 40,348 sqm. Since 2017 there has been a net increase of 12 outlets and in terms of floorspace a decrease of 446 sqm.
  - The centre currently has 27 vacant outlets which lower than the 33 vacant outlets recorded previously in 2017.

**Table 3.32: Bearwood: Change in Number of Outlets & Floorspace 2017-2022**

Category	2017	2017	2022	2022	Change: 2017-2022	
	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)
Convenience	31	7,042	38	6,819	7	-223
Comparison	57	10,303	54	9,002	-3	-1,301
Retail Service	44	4,459	49	4,775	5	316
Leisure Service	50	9,727	65	11,576	15	1,849
Financial and Business Service	37	4,896	32	4,004	-5	-892
Vacant	33	4,004	27	3,893	-6	-111
Other Retail	2	362	1	279	-1	-84
<b>Total</b>	<b>254</b>	<b>40,794</b>	<b>266</b>	<b>40,348</b>	<b>12</b>	<b>-446</b>

Source: Dates of GOAD Category Reports: 06/04/2017 and 13/06/22

- The number of outlets are dominated by leisure services outlets (65) as is the floorspace quantum of floorspace with a total of around 11,576 sqm with financial and business services having the least amount of floorspace.
- The proportion of convenience floorspace (16.9%) is above the national average (15.5%). Proportion of comparison floorspace (22.3%) is lower than the national average 30.2%.
- Vacancy levels by outlets (10.2%) and floorspace (9.7%) is lower than the national average (13.8% respectively).

**Table 3.33: Bearwood: Diversity of Uses Against National Average**

CENTRE	% of Total Outlets			% of Total Floorspace		
	Category	No. Outlets	%	UK Average	Floorspace Sqm	%
Convenience	38	14.29%	9.29%	6,819	16.90%	15.48%
Comparison	54	20.30%	26.93%	9,002	22.31%	30.18%
Retail Service	49	18.42%	15.75%	4,775	11.84%	7.22%
Leisure Service	65	24.44%	25.19%	11,576	28.69%	26.07%
Financial and Business Service	32	12.03%	8.82%	4,004	9.92%	6.65%
Vacant	27	10.15%	13.82%	3,893	9.65%	13.81%
Other Retail	1	0.38%	0.07%	279	0.69%	0.04%
<b>Total</b>	<b>266</b>	<b>100%</b>	<b>100%</b>	<b>40,348</b>	<b>100%</b>	<b>100%</b>

Source: GOAD Category Report Date: 13/06/22

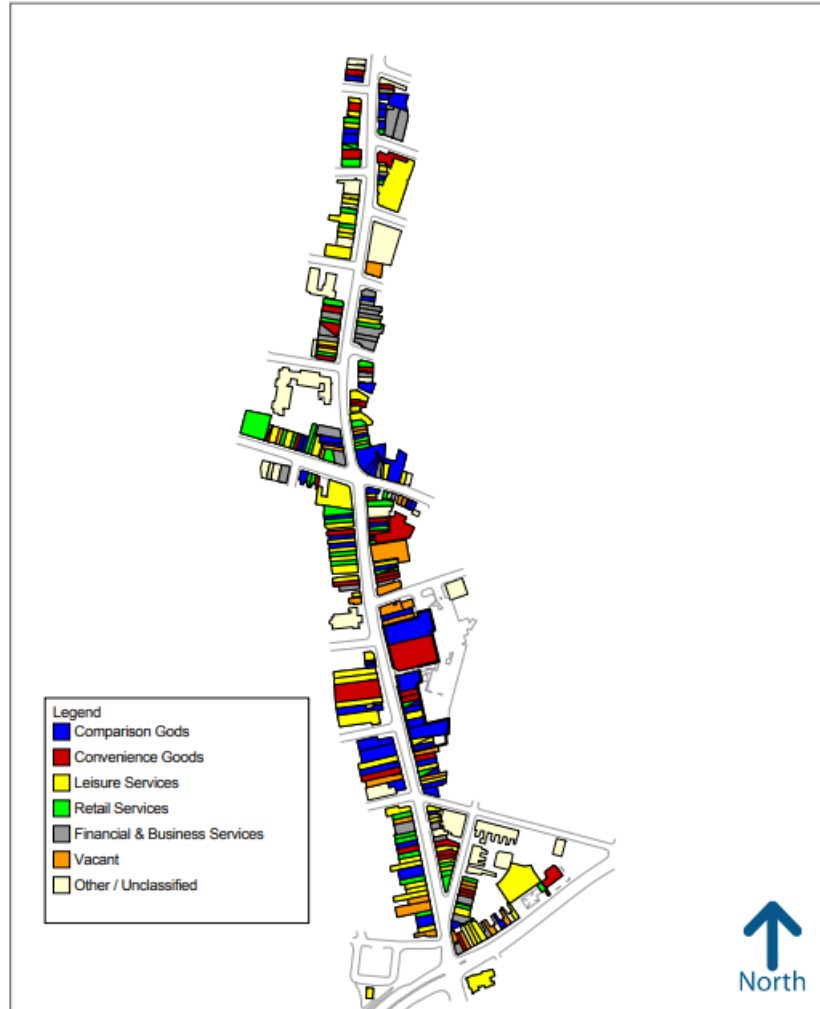
Experian UK average as at 2022

- National multiples account for only 40 (15%) of the 266 outlets indicating that the centre is primarily independent led. However in terms of floorspace, multiples account for 10,200 sqm or 25% of the total floorspace of 40,348 sqm.



- The town centre has a very long linear layout, with comparison and convenience concentrated towards then core and leisure and finance towards the north and south.

**Figure 3.13: Bearwood: Distribution of Town Centre Uses (2022)**



Source: Goad Survey: June 2022

### **Walsall Council: Walsall**

3.61 Walsall is one of the largest town centres in the Black Country area and the largest centre within the Walsall Council area. The town centre is relatively compact and is dominated by the main pedestrianised High Street and Park Street which is lined with a mix of high street chains, independent shops, cafes, and restaurants. Other key streets in the town centre include Bridge Street, which connects Park Street to the bus and train stations, and the historic Lichfield Street. The centre benefits from heritage buildings including the Walsall New Art Gallery and Museum, the Walsall Leather Museum, the Town Hall and St. Matthew's Church.

- 3.62 The shopping areas include the Saddlers Centre and the Old Square Shopping Centre in the town centre and the Crown Wharf Retail Park. Collectively these areas offer a wide range of shops, restaurants, and cafes, as well as a cinema and leisure facilities. Cultural attractions, include the Walsall New Art Gallery and the Walsall Leather.
- 3.63 Transformation of the town is already underway with increased connectivity with new direct trains to London and a commitment to re-open the link to Wolverhampton, plus investment into shopping, leisure, offices, health and education facilities.
- 3.64 Walsall Council has also secured £11.4m from the Future High Street Fund to deliver the Connected Gateway project aimed at improving the connection between the railway and bus stations in the town centre. Furthermore, a total of £47 million was awarded to Walsall from the Government's Towns Fund for both Walsall and Bloxwich town centres. This is aimed at boosting economic growth, improving transport, broadband connectivity and increasing skills. Projects earmarked include the introduction of digital hubs in the heart of Bloxwich as well as one in partnership with the Mercian Trust in Walsall town centre.
- 3.65 The analysis of the current retail offer was undertaken by the Council in October 2022 which provided floorspace and outlet data based on previously defined Goad spatial boundary.

**Table 3.34: Walsall: Diversity of Uses Against National Average**

Walsall	% of Total Outlets			% of Total Floorspace		
	Category	No. Outlets	%	UK Average	Floorspace Sqm	%
Convenience	49	8.89%	9.29%	29,180	19.70%	15.48%
Comparison	106	19.24%	26.93%	37,170	25.09%	30.18%
Retail Service	83	15.06%	15.75%	12,330	8.32%	7.22%
Leisure Service	87	15.79%	25.19%	21,870	14.76%	26.07%
Financial and Business Service	46	8.35%	8.82%	11,450	7.73%	6.65%
Vacant	180	32.67%	13.82%	36,140	24.40%	13.81%
Other Retail	0	0.00%	0.07%	0	0.00%	0.04%
<b>Total</b>	<b>551</b>	<b>100%</b>	<b>100%</b>	<b>148,140</b>	<b>100%</b>	<b>100%</b>

- 3.66 The Council's latest audit details the following:
- There are a total of 551 outlets, of which almost third are vacant (180 units; 32.6%).
  - The vacancy rate of 32.6% is more than double the national average of 13.8%.
  - The proportion of leisure service outlets is considerably lower than the national average (15.8% v/s 25.2% nationally)
- 3.67 Over the period 2018 to 2022, there has been an overall increase of 19 outlets with a total increase of almost 6,000 sqm of floorspace.

**Table 3.35: Walsall: Change in Number of Outlets & Floorspace 2018-2022**

Category	2018	2018	2020	2020	2022	2022
	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)
Convenience	48	29,014	47	30,073	49	29,180
Comparison	135	44,380	119	41,212	106	37,170
Retail Service	67	6,949	83	7,813	83	12,330
Leisure Service	96	24,183	104	28,856	87	21,870
Financial and Business Service	45	8,575	50	9,578	46	11,450
Vacant	141	29,079	145	30,537	180	36,140
Other Retail	0	0	0	0	0	0
<b>Total</b>	<b>532</b>	<b>142,179</b>	<b>548</b>	<b>148,069</b>	<b>551</b>	<b>148,140</b>

Source: Council Data October 2022; Experian GOAD 23/05/20 and 26/09/18

Category	Change: 2018 -2020		Change: 2020 -22		Change: 2018 -2022	
	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)
Convenience	-1	1,059	2	-893	1	166
Comparison	-16	-3,168	-13	-4,042	-29	-7,210
Retail Service	16	864	0	4,517	16	5,381
Leisure Service	8	4,673	-17	-6,986	-9	-2,313
Financial and Business Service	5	1,003	-4	1,872	1	2,875
Vacant	4	1,459	35	5,603	39	7,061
Other Retail	0	0	0	0	0	0
<b>Total</b>	<b>16</b>	<b>5,890</b>	<b>3</b>	<b>71</b>	<b>19</b>	<b>5,961</b>

3.68 Both comparison goods outlets and leisure service both saw a substantial decrease in number of outlets. Vacant outlets increased by 39 outlets as did retail service outlets by 16 outlets.

### **Walsall Council: Aldridge**

3.69 The analysis of the current retail offer in Aldridge was undertaken by the Council in October 2022 which provided floorspace and outlet data based on previously defined Goad spatial boundary. It details the following:

- There are 122 outlets in the centre with a combined floorspace of 21,290 sqm.
- Leisure services have the highest number of outlets (28) closely followed by both comparison goods and retail services with 26 outlets respectively.

**Table 3.36: Aldridge: Diversity of Uses Against National Average**

Aldridge Category	% of Total Outlets			% of Total Floorspace		
	No. Outlets	%	UK Average	Floorspace Sqm	%	UK Average
Convenience	13	10.66%	9.29%	6,150	28.89%	15.48%
Comparison	26	21.31%	26.93%	3,450	16.20%	30.18%
Retail Service	26	21.31%	15.75%	2,650	12.45%	7.22%
Leisure Service	28	22.95%	25.19%	5,260	24.71%	26.07%
Financial and Business Service	17	13.93%	8.82%	1,830	8.60%	6.65%
Vacant	12	9.84%	13.82%	1,950	9.16%	13.81%
Other Retail	0	0.00%	0.07%	0	0.00%	0.04%
<b>Total</b>	<b>122</b>	<b>100%</b>	<b>100%</b>	<b>21,290</b>	<b>100%</b>	<b>100%</b>

Source: Council Data October 2022

Experian UK average as at 2022

- Convenience goods provision has the lowest number of occupied outlets (13) but with the largest quantum of floorspace (6,150 sqm) or almost a third of the total and also almost double the UK average.
- Comparison goods has a total of 3,450 sqm of floorspace which is half that of the UK average.
- Leisure serviced has the second largest amount of floorspace (5,260 sqm) which accounts for around 25% of the centre's floorspace. This is only marginally below the UK average of 26%
- The centre has 12 vacant outlets with a vacancy rate of 9.8% and the associated floorspace of 1,950 sqm (9.2%) both of which are below the UK average (13.8% respectively).

3.70 Since 2017 the key changes identified are:

- The centre now has 2 more recorded outlets and an additional 43 sqm of floorspace.

**Table 3.37: Aldridge: Change in Number of Outlets & Floorspace 2017-2022**

Category	2017	2017	2022	2022	Change: 2017-2022	
	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)
Convenience	14	3,976	13	6,150	-1	2,174
Comparison	29	6,429	26	3,450	-3	-2,979
Retail Service	22	2,443	26	2,650	4	207
Leisure Service	31	5,602	28	5,260	-3	-342
Financial and Business Service	18	2,220	17	1,830	-1	-390
Vacant	6	576	12	1,950	6	1,374
Other Retail	0	0	0	0	0	0
<b>Total</b>	<b>120</b>	<b>21,247</b>	<b>122</b>	<b>21,290</b>	<b>2</b>	<b>43</b>

Source: Dates of GOAD Category Reports: 27/04/2017 and Council Data October 2022

- Whilst the overall total suggests not much change the individually category analysis shows that comparison goods outlets diminished (3 units) and a reduction of 2,979 sqm of floorspace; and convenience goods retail decreased one outlet but with an increase of 2,174 sqm of floorspace.
- Vacant outlets have doubled (from 6 to 12 outlets) whilst vacant floorspace has more than tripled, from 576 sqm to 1,950 sqm.

### **Walsall Council: Bloxwich**

3.71 The analysis of the current retail offer in Bloxwich was undertaken by the Council in October 2022 which provided floorspace and outlet data based on previously defined Goad spatial boundary. It details the following:

- The centre has a total of 156 outlets with a total floorspace of 30,300 sqm.
- The highest proportion of outlets in Bloxwich is represented by retail services (41 outlets) 16.3% of the total and higher than the national average of 15.8%.
- Convenience goods representation is on par with the national average, both in terms of outlets (10.3% v/s UK average of 9.3%) and floorspace (16.7% v/s UK average of 15.5%).
- Comparison goods has the largest quantum of floorspace (8,460 sqm), which is below the national average (27.9% v/s 30.2% respectively).
- Leisure serviced account for 34 outlets (22% of all outlets) and 6,440 sqm of floorspace 21%. Both outlets and floorspace are below the UK average.

**Table 3.38: Bloxwich: Diversity of Uses Against National Average**

Bloxwich Category	% of Total Outlets			% of Total Floorspace		
	No. Outlets	%	UK Average	Floorspace Sqm	%	UK Average
Convenience	16	10.26%	9.29%	5,060	16.70%	15.48%
Comparison	32	20.51%	26.93%	8,460	27.92%	30.18%
Retail Service	41	26.28%	15.75%	4,650	15.35%	7.22%
Leisure Service	34	21.79%	25.19%	6,440	21.25%	26.07%
Financial and Business Service	14	8.97%	8.82%	3,390	11.19%	6.65%
Vacant	19	12.18%	13.82%	2,300	7.59%	13.81%
Other Retail	0	0.00%	0.07%	0	0.00%	0.04%
<b>Total</b>	<b>156</b>	<b>100%</b>	<b>100%</b>	<b>30,300</b>	<b>100%</b>	<b>100%</b>

Source: Council Data October 2022

Experian UK average as at 2022

- The centre has a reasonable representation of finance and business services in terms of outlets and floorspace when compared to the national average.
- The number of vacant outlets is below the national average (12.2% v/s 13.8% national) as is vacant floorspace (7.6%) which is half the national average (13.8%).

3.72 Since 2017, the key changes identified are:

- An increase of 7 outlets and floorspace of some 264 sqm.
- The largest reduction in floorspace terms was for convenience goods (1,406sqm), although overall it was based on the loss of 1 outlet.
- Retail services experienced the largest increase in outlet numbers (11) and corresponding floorspace (1,510sqm).

**Table 3.39: Bloxwich: Change in Number of Outlets & Floorspace 2017-2022**

Category	2017	2017	2022	2022	Change: 2017-2022	
	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)
Convenience	17	6,466	16	5,060	-1	-1,406
Comparison	36	9,095	32	8,460	-4	-635
Retail Service	30	3,140	41	4,650	11	1,510
Leisure Service	37	6,773	34	6,440	-3	-333
Financial and Business Service	13	2,824	14	3,390	1	566
Vacant	16	1,737	19	2,300	3	563
Other Retail	0	0	0	0	0	0
<b>Total</b>	<b>149</b>	<b>30,036</b>	<b>156</b>	<b>30,300</b>	<b>7</b>	<b>264</b>

Source: Dates of GOAD Category Reports: 27/04/2017 and Council Data October 2022

## Walsall Council: Brownhills

3.73 The analysis of the current retail offer in Brownhills was undertaken by the Council in October 2022 which provided floorspace and outlet data based on previously defined Goad spatial boundary. It details the following:

- There are a total of 137 units with an overall floorspace of 27,870 sqm.

**Table 3.40: Brownhills: Diversity of Uses Against National Average**

Brownhills Category	% of Total Outlets			% of Total Floorspace		
	No. Outlets	%	UK Average	Floorspace Sqm	%	UK Average
Convenience	13	9.49%	9.29%	8,060	28.92%	15.48%
Comparison	26	18.98%	26.93%	6,640	23.82%	30.18%
Retail Service	29	21.17%	15.75%	3,130	11.23%	7.22%
Leisure Service	20	14.60%	25.19%	3,310	11.88%	26.07%
Financial and Business Service	8	5.84%	8.82%	830	2.98%	6.65%
Vacant	41	29.93%	13.82%	5,900	21.17%	13.81%
Other Retail	0	0.00%	0.07%	0	0.00%	0.04%
<b>Total</b>	<b>137</b>	<b>100%</b>	<b>100%</b>	<b>27,870</b>	<b>100%</b>	<b>100%</b>

Source: Council Data October 2022

Experian UK average as at 2022

- Convenience and comparison goods have 39 outlets in total; some 28.5% or almost a third of the total number of outlets.
- In terms of floorspace, both convenience (28.9%) and comparison goods (23.8%) account for more than half of the total.
- The proportion of convenience goods floorspace (28.2%) is almost double the national average (15.5%) whilst the proportion for comparison goods (23.8%) is below the national average of 30.2%.
- Retail service (29 outlets) and leisure service (20 outlets) account for around 11% - 12% each. Leisure service has lower proportion of floorspace (11.9%) compared to national average of 26%.
- Financial and business services are both lower than average both by outlets (5.8% v/s 8.8% nationally) and floorspace (3% v/s 6.7% nationally).
- Almost 30% of the outlets in the centre are vacant (41 in total) and over double the UK average of 13.8%. This corresponds to over 21% of the floorspace (5,900 sqm) as being vacant.

3.74 Since 2017, the key changes identified are:

- The centre has 5 more outlets and an increase of 900 sqm in floorspace.
- Vacant outlets and floorspace saw the largest increase (6 outlets and 660s sqm).

- Comparison goods outlets showed the largest reduction (5 outlets and 625 sqm reduction).
- Both retail and leisure services have increased floorspace since 2017.

**Table 3.41: Brownhills: Change in Number of Outlets & Floorspace 2017-2022**

Category	2017	2017	2022	2022	Change: 2017-2022	
	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)
Convenience	11	7,748	13	8,060	2	312
Comparison	31	7,265	26	6,640	-5	-625
Retail Service	28	2,852	29	3,130	1	278
Leisure Service	20	2,954	20	3,310	0	356
Financial and Business Service	7	910	8	830	1	-80
Vacant	35	5,240	41	5,900	6	660
Other Retail	0	0	0	0	0	0
<b>Total</b>	<b>132</b>	<b>26,970</b>	<b>137</b>	<b>27,870</b>	<b>5</b>	<b>900</b>

## Walsall Council: Darlaston

3.75 The analysis of the current retail offer in Darlaston was undertaken by the Council in October 2022 which provided floorspace and outlet data based on previously defined Goad spatial boundary. It details the following:

- There are a total of 82 units with an overall floorspace of 15,750 sqm.

**Table 3.42 Darlaston: Diversity of Uses Against National Average**

Darlaston Category	% of Total Outlets			% of Total Floorspace		
	No. Outlets	%	UK Average	Floorspace Sqm	%	UK Average
Convenience	9	10.98%	9.29%	6,660	42.29%	15.48%
Comparison	15	18.29%	26.93%	2,100	13.33%	30.18%
Retail Service	23	28.05%	15.75%	1,750	11.11%	7.22%
Leisure Service	18	21.95%	25.19%	2,510	15.94%	26.07%
Financial and Business Service	8	9.76%	8.82%	1,370	8.70%	6.65%
Vacant	9	10.98%	13.82%	1,360	8.63%	13.81%
Other Retail	0	0.00%	0.07%	0	0.00%	0.04%
<b>Total</b>	<b>82</b>	<b>100%</b>	<b>100%</b>	<b>15,750</b>	<b>100%</b>	<b>100%</b>

Source: Council Data October 2022

Experian UK average as at 2022

- There are 9 vacant outlets (almost 11% of the total) equating to 1,360sqm of floorspace (8.6% of total) which is below the national average of 13.8% respectively.
- Retail service has the highest proportion of outlets (22 outlets; 28.1% of total).



- Convenience goods outlets (9) occupy the largest amount of floorspace (6,660 sqm) representing 42% of the overall floorspace and above the UK average of 15.5%.
- Comparison goods has 15 outlets (18.3% of the total) and some 2,100sqm of floorspace (13.3%) which is considerably below the national average of 30.2%.
- There are a total of 18 leisure service outlets (22.1% of total) with 2,510 sqm of floorspace (15.9% of total). Both are below the national average of 25.2% (outlets) and 26.9% (floorspace).

3.76 Since 2017, the key changes identified are:

- An overall increase of 3 outlets and 393 sqm of floorspace.
- There was a reduction of vacant outlets (from 16 to 9) and floorspace and by 396 sqm.
- Whilst there was no change in the number of leisure service outlets, there was a reduction in floorspace by 704 sqm.
- There were increases to comparison, convenience and retail service outlets and floorspace.

**Table 3.43: Darlaston: Change in Number of Outlets & Floorspace 2017-2022**

Category	2017	2017	2021	2021	Change: 2017-2021	
	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)
Convenience	6	6,420	9	6,660	3	240
Comparison	12	1,607	15	2,100	3	493
Retail Service	17	1,310	23	1,750	6	440
Leisure Service	18	3,214	18	2,510	0	-704
Financial and Business Service	10	1,050	8	1,370	-2	320
Vacant	16	1,756	9	1,360	-7	-396
Other Retail	0	0	0	0	0	0
<b>Total</b>	<b>79</b>	<b>15,357</b>	<b>82</b>	<b>15,750</b>	<b>3</b>	<b>393</b>

Source: Dates of GOAD Category Reports: 29/03/2017 and Council Data October 2022

### **Walsall Council: Willenhall**

3.77 The analysis of the current retail offer in Willenhall was undertaken by the Council in October 2022 which provided floorspace and outlet data based on previously defined Goad spatial boundary. It details the following:

- There are a total of 183 units with an overall floorspace of 30,980 sqm.

**Table 3.44: Willenhall: Diversity of Uses Against National Average**

Willenhall Category	% of Total Outlets			% of Total Floorspace		
	No. Outlets	%	UK Average	Floorspace Sqm	%	UK Average
Convenience	18	9.84%	9.29%	6,000	19.37%	15.48%
Comparison	42	22.95%	26.93%	7,800	25.18%	30.18%
Retail Service	45	24.59%	15.75%	4,140	13.36%	7.22%
Leisure Service	26	14.21%	25.19%	4,390	14.17%	26.07%
Financial and Business Service	19	10.38%	8.82%	4,080	13.17%	6.65%
Vacant	33	18.03%	13.82%	4,570	14.75%	13.81%
Other Retail	0	0.00%	0.07%	0	0.00%	0.04%
<b>Total</b>	<b>183</b>	<b>100%</b>	<b>100%</b>	<b>30,980</b>	<b>100%</b>	<b>100%</b>

Source: Council Data October 2022

Experian UK average as at 2022

- There are a total of 33 vacant outlets reflecting a vacancy rate of 18% which is higher than the national average of 13.8%.
- Convenience goods (18 outlets; 9.8% of total) is above the national average of 9.3%. By floorspace this equates to a total of 6,000 sqm or 19.4% of the total floorspace and higher than the national average of 15.5%.
- Comparison goods (42 outlets; 23% of total) is below the national average of 26.9% as is the floorspace total of 7,800 sqm or 25.2% which is lower than the national average of 30.2%.
- The centre has the highest number of outlets in the retail service category (45 outlets; 24.6% of the total). This category in terms of floorspace (4,140sqm) or 13.4% national average of 7.2%.
- Leisure service is underrepresented in terms of outlet numbers 26 outlets or 14.2% of the total) and floorspace 4,140 sqm (or 13.4% of total) when compared to the national averages of 25.2% (outlets) and 26.1% (floorspace).
- The centre has 19 financial and business service outlets (10.4% of the total) but whose floorspace 4,080 sqm accounts for 13.2% of the total which is almost double the national average of 6.7%.

3.78 Since 2018, the key changes identified are:

- The centre has gained 4 outlets with an increase in floorspace of some 1,660 sqm.
- Retail service has experienced the most significant increase both in terms of outlets (16) and floorspace (1,483 sqm).
- Comparison goods outlets saw a reduction of 11 outlets but a marginal reduction of 32 sqm of floorspace.

- Leisure service saw a decrease of 5 outlets (and 803 sqm in floorspace) accentuating the low level of representation from 2018.

**Table 3.45: Willenhall: Change in Number of Outlets & Floorspace 2018-2022**

Category	2018	2018	2022	2022	Change: 2018-2022	
	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)
Convenience	22	6,169	18	6,000	-4	-169
Comparison	53	7,832	42	7,800	-11	-32
Retail Service	29	2,657	45	4,140	16	1,483
Leisure Service	31	5,193	26	4,390	-5	-803
Financial and Business Service	17	3,540	19	4,080	2	540
Vacant	27	3,930	33	4,570	6	640
Other Retail	0	0	0	0	0	0
<b>Total</b>	<b>179</b>	<b>29,320</b>	<b>183</b>	<b>30,980</b>	<b>4</b>	<b>1,660</b>

Source: Dates of GOAD Category Reports: 01/08/2018 and Council Data October 2022

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## 4. Quantitative Retail Needs Assessment: Assumptions

- 4.1 This section provides an update on the key assumptions and forecasts underpinning the quantitative need (capacity) assessment for new retail (comparison and convenience goods) floorspace in the BCLA area up to 2039. The assessment updates and supersedes the retail capacity findings identified in the 2020 Centres Study and subsequent 2021 Update.

### Assumptions & Forecasts

- 4.2 The 'baseline' capacity tabulations are set out in **Appendices 2 to 5D (Volume 2)** for convenience goods and **Appendices 6 to 9D (Volume 2)** for comparison goods. The capacity forecasts are based on the most recent population growth projections from Experian, which are derived from the Office of National Statistics' (ONS) 2020-based subnational population projections (released March 2020)<sup>23</sup> and this methodology reflects best practice when undertaking capacity modelling.
- 4.3 The following describes the key steps and assumptions underpinning the retail capacity assessment.

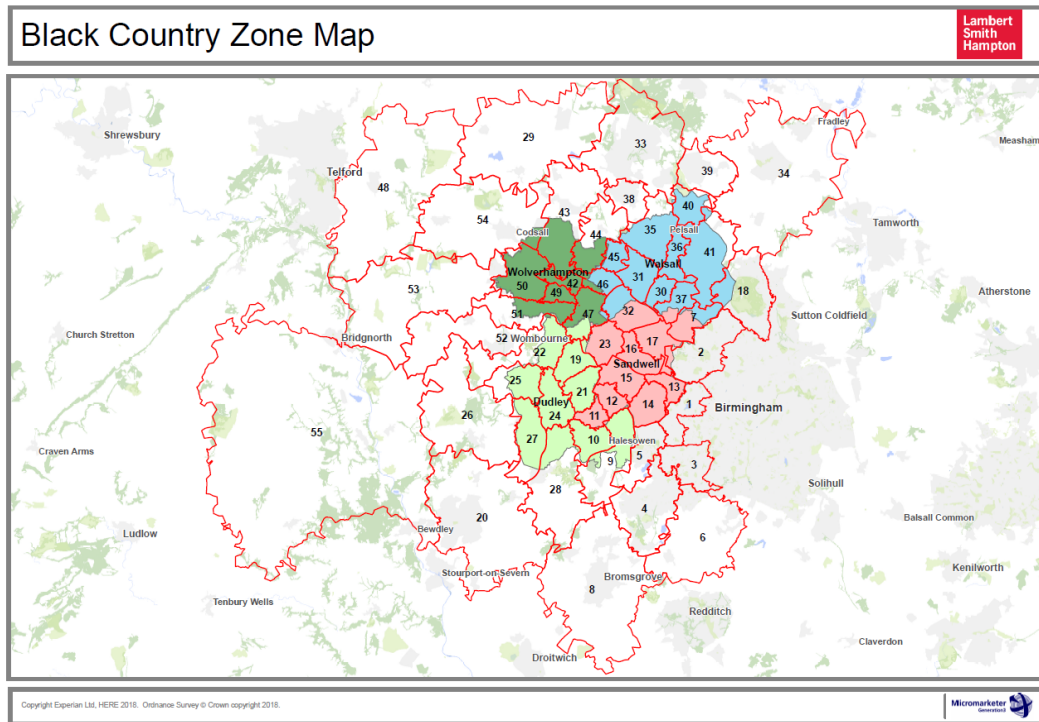
### Study Area and Zones

- 4.4 The Study Area and zones remain the same as that defined under the 2020 Centres Study (as shown below). The study area covers a robust and extensive area, which extends beyond the BCLAs administrative areas in order to reasonably maximise capturing the Black Country's catchment. The study area and number of zones (55) is larger than the previous Black Country Centres Study (GVA Grimley 2009), including as a result of collaboration with South Staffordshire District Council.

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<sup>23</sup> Experian: Retail Planner UK 2021 Release Note

Figure 4.1: Black Country Centres Study: Study Area



## Market Shares

- 4.5 The capacity assessment is underpinned by market shares for stores and centres across the BCLA, which was identified by a Household Telephone Interview Survey (HTIS) conducted by NEMS Market Research (market leaders and the research company of choice in relation to planning policy centres studies) in June and July 2019 to inform the 2020 Centres Study. This was also used in the subsequent 2021 Update. The HTIS covered 5,500 respondents and an additional 550 online surveys were undertaken. This approach is robust and reflects well-established best practice, particularly in terms of the methodology and content of the survey.

## Population Projections

- 4.6 Table 1, (Volume 2, Appendix 2 for convenience goods and Appendix 6 comparison goods) sets out the latest base year (2022) population and projections (to 2024, 2029, 2034 and 2039) sourced from the Experian MMG3 Geographic Information System (MMG3 GIS) for the Study Area.

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- 4.7 Experian's population projections show the Study Area population (Zones 1-55) is forecast to increase by +7.7% (+166,509 people) between 2022 and 2039. The latest growth projections represent an increase of 0.44% per annum (between 2022 and 2039).
- 4.8 In contrast the 2021 Update indicated higher increase of +8.2% (+178,078 people) between 2021 and 2039 but showing the same level of annual increase of 0.44% per annum (between 2021 and 2039).

### **Expenditure per Capita & Special Forms of Trading (SFT)**

- 4.9 Table 3 of **Appendices 2 and 6 (Volume 2)** forecasts the growth in total available convenience goods and comparison goods retail expenditure respectively across the Study Area and zones between 2021 and 2039 (excluding SFT)<sup>24</sup>.
- 4.10 The base year average expenditure figures have been derived from our (MMG3 GIS) and is based on 2020 prices (the 2020 Centres Study was based on 2017 prices and 2021 Update on 2019 prices).
- 4.11 In identifying expenditure per capita, an allowance has been made for the market share of non-store retail sales (i.e. Special Forms of Trading) at the base year and over the forecast period. As with the 2020 Centres Study an allowance for SFT at the base year has been informed by the results of the household telephone interview survey and 'adjusted' to take account of goods sourced from traditional ('physical') retail space based on Experian's latest Retail Planner Briefing Note 19 (January 2022) (see also paragraphs 2.14-2.15).

### **Average Expenditure Growth Forecasts**

- 4.12 The growth in average expenditure per capita levels over period to 2039 has been informed by the forecasts set out in Experian's latest Retail Planner Briefing Note (as described in **Section 2**). Experian's forecasts show for:
- convenience goods – a fall in convenience spend in 2022 (-2%), and annual (per capita) growth over the medium to long term “flatlining” at around +0.1% up to 2040. By way of comparison, the previous studies showed the following:
    - the 2021 Study was based on Experian Retail Planner Briefing Note 18 (October 2020) that forecast a higher fall in convenience spend in 2021 (-6.2%), a +0.2% growth in 2022 and annual (per capita) growth over the medium to long term “at around +0.1% up to 2040.

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<sup>24</sup> Total expenditure is derived by multiplying the population and average expenditure per capita levels together.

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- the 2020 Study was reliant on Experian's Retail Planner Briefing Note 16 (December 2018) that forecast limited growth of +0.1% from 2020 to 2037 and beyond.
  - comparison goods – following growth of 2.1% in 2022, Experian predict that (per capita) growth will settle at around +2.9% per annum on average up to 2040. Comparatively, the previous studies showed the following:
    - the 2021 Study showed negative growth of -8.5% in 2020, a +6.5% growth in 2021; +3.5% growth in 2022 and thereafter +3% per annum growth on average up to 2040
    - the 2020 Study showed growth of +2.6% in 2019 and +2.8% in 2020 and predicted growth of circa +3.3% between 2021 and 2037.

### Total Available Expenditure

4.13 Total available retail expenditure over the period to 2039 show:

- a 8.5% (+£419.6m) growth in total convenience goods expenditure over the period 2022 and 2039 (Table 3, Appendix 2, Volume 2). The 2021 Study forecast a 8.8% (+£394.4m) growth in total convenience goods expenditure between 2021 and 2039. In comparison the 2020 Centres Study forecast an increase of +6.6% (+£464.9m) for the Study Area (Zones 1-55) between 2019 and 2038.
- a 58.8% (+£3,296.9m) growth in total comparison goods expenditure by 2039 (Table 3, Appendix 2, Volume 2). The 2021 Study forecast a 64.3% (+£3,230.8m) growth in total comparison goods between 2021 and 2039. In comparison the 2020 Centres Study forecast an increase of +88.4% (+£5,072.9) across the Study Area (Zones 1-55) between 2019 and 2038.
- The current expenditure forecasts, especially when compared to those in the 2020 Centres Study, are lower. This is a reflection of the initial lower population forecasts as well as lower expenditure projections across both types of goods.

### 'Inflow' (Trade Draw) From Outside Study Area

4.14 We have necessarily made informed judgements with regard to the likely 'inflow' (trade draw) from outside the Study Area drawing from the 2020 Centres Study.

4.15 The 'inflow' of convenience goods expenditure to the main centres and stores from outside the wider Study Area will also be more limited than for comparison goods, as households generally carry out their main food shop at their more local and convenient stores, and do not generally travel longer distances for food purchases.

4.16 Based on the (survey-derived) market analysis and the 'inflow' assumptions, **Table 1, Appendices 5A – 5D (Volume 2)**, set out the revised turnover estimates for convenience

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across the BCLA with estimates for comparison goods turnover presented in **Table 1, Appendices 9A – 9D (Volume 2)**.

### **Planned Commitments & New Development**

- 4.17 In terms of retail commitments, Table 2 in Appendices 5A to 5D (Volume 2) (convenience goods) and Table 2 Appendices 9A to 9D (comparison goods) set out planned retail floorspace identified for both goods types.
- 4.18 This updates the major planned / committed retail schemes across the BCLA area as detailed in the 2020 and 2021 Centres Studies and updated by the BCLA with the latest available information. Commitments that have been built-out since 2019 are accounted for in the modelling work as they would not have been identified by respondents in the Household Survey.
- 4.19 The major planned / committed retail schemes in the City of Wolverhampton LPA area by type of goods are:



**Table 4.1: City of Wolverhampton LPA Area: Commitments: Convenience Goods**

	<b>CENTRE</b>	<b>PLANNING REF</b>	<b>SCHEME</b>	<b>Gross Floorspace (sq m)</b>	<b>Net Floorspace (sq m)</b>
[1]	Wolverhampton - Edge-of-City Centre	16/00598/PAOTH	Interchange: Railway Station - Wolverhampton Railway Station Railway Drive City Centre Wolverhampton West Midlands WV1 1LE	825	193
[2]	Blakenhall District Centre (Dudley Road)	18/00132/FUL	Community Centre: Proposed part change of use from Industrial building to form 4 Retail units.	314	110
[3]	Wolverhampton - Out-of-Centre	13/00871/FUL	Pountney Street, unit shops - Proposed change of use of the existing basement area to create a mixed use development comprising retail units, bar, restaurant, creche and indoor parking   Basement Of Former J W Braithwaite Pountney Street Wolverhampton West Midlands WV2 4HX	1,098	384
[4]	Wolverhampton - Out-of-Centre	16/00678/FUL	Aldi Portobello: Land Between New Street South Street Portobello Wolverhampton West Midlands. Proposed new Food Retail Store (Use Class A1), with associated car parking, servicing and landscaping (amended proposal following earlier approval).	1,505	1,064
[5]	Parkfield Local Centre	19/01048/FUL	Aldi, Parkfield	421	320
[6]	Bilston - 72-84 High St, Bilston.	21/01456/FUL	Lidl, Bilston	2,486	327
[7]	Wolverhampton (Out-of-Centre)	21/00402/FUL	Lidl - Former Quality Hotel Site, 126 Penn Road	1,926	943
<b>TOTAL</b>				<b>8,575</b>	<b>3,341</b>

Notes:

- [1] Under construction in two stages, which will provide 6 units. Assume 33% A1 convenience and gross to net ratio of 70%
- [2] Built-out, unoccupied. Assumed that of the total floorspace 314 sqm permitted the convenience /comparison split will be 50% / 50% and the gross to net ratio applied is 70%.
- [3] One 120sqm unit built out, previously occupied by a comparison operator and now vacant. Assumed that of the total permitted floorspace of 1,098 sqm the convenience /comparison split will be 50% / 50% and netted down using a gross to net factor of 70%.
- [4] Built-out, occupied. Assumed of the 1,254sqm sales area 190sqm max sales area for comparison goods, remaining 1,064sqm is convenience sales area.
- [5] Built-out, Aldi Goldthorn Hill Wolverhampton, WV2 3HP. Extension of existing food retail store (Class A1) with associated alterations to existing car parking, access, servicing & landscaping. Assumed net increase of 320 sqm is for convenience goods.
- [6] Lidl Bilston - Land And Buildings At 72-84 High St WV14 0EZ. Demolition of existing buildings and erection of a retail foodstore (Class E) and two commercial units (Class E) with access, car parking, landscaping and associated engineering works. The Council details that the replacement Lidl store would create an additional 327sqm convenience goods net sales area.
- [7] Lidl - Former Quality Hotel Site, 126 Penn Road (including 42 Oaklands Road And Business Centre) Wolverhampton WV3 0ER Demolition of existing buildings and erection of a Class E limited assortment discount foodstore with associated car parking, access, landscaping and engineering works. Council has detailed resolution to grant planning permission - condition restricts convenience sales area to 943sqm net and comparison goods to 236 sqm net.

**Table 4.2: City of Wolverhampton LPA Area: Commitments: Comparison Goods**

	CENTRE	PLANNING REF	SCHEME	Gross Floorspace (sq m)	Net Floorspace (sq m)
[1]	Blakenhall District Centre (Dudley Road)	18/00132/FUL	Community Centre: Proposed part change of use from Industrial building to form 4 Retail units.	314	110
[2]	Wolverhampton - OTC	19/00349/FUL	Installation of 697sqm mezzanine and elevational changes to Unit F. St Johns Retail Park Church Street City Centre Wolverhampton West Midlands WV2 4SJ	697	600
[3]	Wolverhampton - OTC	13/00871/FUL	Pountney Street, unit shops - Proposed change of use of the existing basement area to create a mixed use development comprising retail units, bar, restaurant, creche and indoor parking   Basement Of Former J W Braithwaite Pountney Street Wolverhampton West Midlands WV2 4HX	1,098	384
[4]	Wolverhampton - OTC	16/00678/FUL	Aldi Portobello: Land Between New Street South Street Portobello Wolverhampton West Midlands. Proposed new Food Retail Store (Use Class A1), with associated car parking, servicing and landscaping (amended proposal following earlier approval).	1,505	190
[5]	Wolverhampton - City Centre	14/00310/FUL	Mander Centre reconfiguration	8,360	3,855
[6]	Wolverhampton - OTC	21/00402/FUL	Lidl - Former Quality Hotel Site, 126 Penn Road	1,926	236
<b>TOTAL</b>				<b>13,900</b>	<b>5,375</b>

Notes:

- [1] Built-out, unoccupied. Assumed that of the total floorspace 314 sqm gross permitted the convenience /comparison split will be 50% / 50% and the gross to net ratio applied is 70%.
- [2] Built-out, occupied. Permission provides for maximum 600sqm mezzanine net sales area.
- [3] One 120sqm unit built out, previously occupied by a comparison operator and now vacant. Assumed that of the total permitted floorspace of 1,098 sqm the convenience /comparison split will be 50% / 50% and netted down using a gross to net factor of 70%.
- [4] Built-out, occupied. 190sqm max sales area for comparison goods.
- [5] Built-out; Demolition of south western corner of Mander Centre fronting Bell Street, to be replaced by a new 8,360 sqm department store unit. Creation of larger retail units at ground floor, construction of a new retail kiosk fronting Woolpack Alley and refurbishment of existing mall. Council provided an uplift of 5,507 sqm gross. Applied gross to net ratio of 70% representing a net increase of 3,855 sqm net.
- [6] Lidl - Former Quality Hotel Site, 126 Penn Road (including 42 Oaklands Road And Business Centre) Wolverhampton WV3 0ER Demolition of existing buildings and erection of a Class E limited assortment discount foodstore with associated car parking, access, landscaping and engineering works. Council has detailed resolution to grant planning permission - condition restricts convenience sales area to 943sqm net and comparison goods to 236 sqm net.

4.20 The major planned / committed retail schemes in the Dudley MBC area by type of goods are:

**Table 4.3: Dudley MBC LPA Area: Commitments: Convenience Goods**

CENTRE	PLANNING REF	SCHEME	Gross Floorspace (sq m)	Net Floorspace (sq m)
Dudley-Town Centre	P18/0590	Demolition, remodelling and remediation; redevelopment to allow: retail, service and leisure accommodation (use classes A1, A2, A3, A4, A5, D2); student accommodation (Use Class C2); dwelling houses (C3); hotel accommodation (C1); offices (B1a); non-residential institution uses (D1); car showroom (sui generis) taxi rank; public space; highways, access and pedestrian connectivity works; car parking; landscaping; associated works (outline, all matters reserved)	2,322	1,625
Lye-Out-of-Centre	P15/0845	Former Clarkson Place Unit, Thorns Road, Lye, DY5 2LD; Erection of retail store (Aldi) (A1) with associated car parking and landscaping.	1,554	1,003
Dudley-Out-of-Centre	P20/1428	Unit 10 Castle Mill Works: change of use from B2/B8 to Members Retail Warehouse Club	1,977	1,143
Kingwinsford-Out-of-Centre	P19/0352	Former petrol filling station, Stream Rd, Kingswinford; Erection of a new convenience store and associated parking	233	163
<b>TOTAL</b>			<b>6,086</b>	<b>3,934</b>

Notes:

- [1] A1 shops (food): maximum 2,322 sqm , netted down by 70%.
- [2] Built-out, Council states 1,554 sq m of gross A1 retail floorspace and some 1,254 sq m net. The net floorspace figure is broken down into 1,003 sqm net convenience goods and 251 sqm net for comparison goods.
- [3] Built-out, Unit 10 Castle Mill Works: change of use from B2/B8 to Members Retail Warehouse Club. Dudley Council has provided a gross retail area of 1,977 sqm and net retail floorspace area of some 1,143 sqm.
- [4] Under construction; Erection of a new convenience store and associated parking. Dudley Council has provided a gross retail area of 233 sqm and a net retail floorspace area of some 163 sqm.

**Table 4.4: Dudley MBC LPA Area: Commitments: Comparison Goods**

	CENTRE	PLANNING REF	SCHEME	Gross Floorspace (sq m)	Net Floorspace (sq m)
[1]	Dudley - Town Centre	P18/0590	Demolition, remodelling and remediation; redevelopment to allow: retail, service and leisure accommodation (use classes A1, A2, A3, A4, A5, D2); student accommodation (Use Class C2); dwelling houses (C3); hotel accommodation (C1); offices (B1a); non-residential institution uses (D1); car showroom (sui generis) taxi rank; public space; highways, access and pedestrian connectivity works; car parking; landscaping; associated works (outline, all matters reserved)	4,180	2,926
[2]	Lye-Out-of-Centre	P15/0845	Former Clarkson Place Unit, Thorns Road, Lye, DY5 2LD; Erection of retail store (Aldi) (A1) with associated car parking and landscaping.	1,554	251
[3]	Brierley Hill - Edge of	P21/1786	Unit B2 The Boulevard, Merry Hill: installation of a mezzanine floor	998	977
<b>TOTAL</b>				<b>6,732</b>	<b>4,154</b>

Notes:

- [1] A1 shops (non-food): maximum 4,180 sqm gross netted down by a ratio of 70%.
- [2] Planning Statement accompanying application provides 1805 sq m of gross A1 retail floorspace and some 1,254 sq m net. The net floorspace figure is broken down into 1,003 sqm net convenience goods and 251 sqm net for comparison goods.
- [3] Proposed plan accompanying application shows 998 sqm gross area and 977 sq m net sales area.

4.21 The major planned / committed retail schemes in the Sandwell MBC area by type of goods are:

**Table 4.5: Sandwell MBC LPA Area: Commitments: Convenience Goods**

	CENTRE	PLANNING REF	SCHEME	Gross Floorspace (sq m)	Net Floorspace (sq m)
[1]	West Bromwich-Town Centre	DC/13/56479	3 Bull Street West Bromwich Ringway West Bromwich B70 6EU. mixed use development including retail, restaurant and five apartments.	300	210
[2]	West Bromwich-Town Centre	DC/16/59740	Proposed mixed use development consisting of 4 No. ground floor commercial units with 49 No. apartments above with undercroft car parking to rear and cycle and refuse storage   Car Park Victoria Street West Bromwich	295	103
[3]	West Bromwich-Edge of Town Centre	DC/18/62210	Staples Limited Tildasley Street West Bromwich B70 9SJ. Proposed variation of condition 1 of planning permission DC/18/62210 (Proposed change of use to supermarket (Class A1), external alterations including new store access, loading bay extension, trolley bay canopy, and alterations to car park and landscaping) to remove loading bay extension and replace with rear access ramp and new ramp to customer service entrance.	1,973	1,052
[4]	Great Bridge-Town Centre	DC/15/58596	87 Whitehall road and land adjacent to West Bromwich, Great Bridge. 2 No. retail units with 2 No. two bedroom flats above and two storey building comprising of 8 No. two bedroom flats with associated parking.	150	105
[5]	Oldbury Town Centre-Edge of Centre	DC/17/61306	9 Oldbury Green Retail Park Oldbury Ringway Oldbury B69 3DD. Proposed installation of mezzanine floor.	465	326
[6]	Cradley Heath - Town Centre	DC/17/61336	Land Adj 149 Halesowen Road Cradley Heath B64 6HX. Proposed 2 storey building comprising of 3 shops at ground floor with 2 No. one bedroom flats above and associated parking (revised application - DC/17/60463).	128	90
[7]	Wednesbury - Out-of-Centre	DC/15/57967	Johal Supersave 90 Oxford Street Wednesbury WS10 0PY - replacement shop with five apartments above	203	142
[8]	Smethwick Local Centre - Town Centre	DC/15/58733	Site Of 2 To 4 Cape Hill Smethwick. Proposed three storey development comprising of 3 No. retail units at ground floor and 6 No. 2 bed apartments at first and second floor.	202	141
[9]	Tipton Local Centre-In-Centre	DC/17/60958	Lidl UK & Car Repairs & Testing Centre 119 Horseley Heath Tipton DY4 7AH. Demolition of existing buildings and proposed construction of a replacement foodstore with associated access, parking, cycle parking, landscaping, and associated works.	262	183
[10]	Smethwick Local Centre - Town Centre	DC/20/64854	15 Tollhouse Way; Smethwick; B66 1HJ. Proposed demolition of derelict garage and erection of 3 storey building to create 3 No. commercial ground floor units and 6 No. apartments above.	182	64
[11]	Wednesbury Town Centre	DC/20/64006	41 Lower High Street; Wednesbury; WS10 7AJ. Proposed change of use of the former Barclays Bank into a shop (Class A1) at ground floor and self-contained flats (Class C3) on first and second floors with external alterations to windows and doors.	207	145
[12]	Out-of-Centre: Gorse Farm Road	DC/19/63758	The Red Admiral; 52 Gorse Farm Road; Great Barr; B43 5LR. Proposed demolition of existing public house and erection of 1 No. single storey retail building (Class A1) with associated car parking and plant area.	366	256
[13]	Tipton Local Centre-In-Centre	DC/19/63355	Unit 12 - 16; Unity Walk; Tipton; DY4 8QL. Proposed change of use to shops (Class A1).	425	149
[14]	Oldbury Town Centre	DC/19/63208	Former Perrott Arms; 2 Birmingham Road; Oldbury; B69 4ED. Proposed change of use and two storey rear extension to create 3 No. shops at ground floor and 2 No. one bedroom flats above.	205	72
[15]	Cradley Heath - Town Centre	DC/20/63941	Jays Bar 3 Graingers Lane Cradley Heath B64 6AH. Proposed change of use from a public house (Class use A4) to 3 No. retail units (Class use A1).	123	86
[16]	West Bromwich-Town Centre	DC/21/65782	9B Astle Park West Bromwich B70 8NS. Proposed change of use to retail (Class E(a)).	555	389
[17]	Tipton Local Centre-Out-of-Centre	DC/18/62117	The Sportsman, St Marks Road, Tipton. Proposed re-development and extension of existing Public House to provide new Class A1 local food store along with associated car parking and servicing.	404	280
[18]	Tipton Local Centre-In-Centre	DC/19/63355	Unit 12 - 16 Unity Walk Tipton DY4 8QL. Proposed change of use to shops (Class A1).	430	151
<b>TOTAL</b>				<b>6,875</b>	<b>3,943</b>

Notes:

- [1] Assumed gross to net ratio of 70% and that all the floorspace is for convenience goods.  
 [2] Assumed gross to net ratio of 70% and that 50% of the floorspace is for A1 convenience goods and that 50% is for A3 uses.  
 [3] Aldi application, as per planning and retail statement net sales area of 1,315. It is assumed that of this 80% of all the floorspace is for convenience good and that remainder 20% is for comparison goods.  
 [4] Assumed gross to net ratio of 70% and that all the floorspace is for convenience goods.  
 [5] Assumed gross to net ratio of 70% and that all the floorspace is for convenience goods.  
 [6] Assumed gross to net ratio of 70% and that all the floorspace is for convenience goods.  
 [7] Assumed gross to net ratio of 70% and that all the floorspace is for convenience goods.  
 [8] Assumed gross to net ratio of 70% and that all the floorspace is for convenience goods.  
 [9] Assumed gross to net ratio of 70% and that all of the net additional floorspace proposed is for convenience goods.  
 [10] Assumed gross to net ratio of 70% and that 50% of the floorspace is for convenience goods and that 50% is for comparison goods.  
 [11] Assumed gross to net ratio of 70% and that all the floorspace is for convenience goods.  
 [12] Assumed gross to net ratio of 70% and that all the floorspace is for convenience goods.  
 [13] Assumed gross to net ratio of 70% and that 50% of the floorspace is for convenience goods and that 50% is for comparison goods.  
 [14] Assumed gross to net ratio of 70% and that 50% of the floorspace is for convenience goods and that 50% is for comparison goods.  
 [15] Assumed gross to net ratio of 70% and that all the floorspace is for convenience goods.  
 [16] Assumed gross to net ratio of 70% and that all the floorspace is for convenience goods.  
 [17] Assumed that all the floorspace is for convenience goods.  
 [18] Assumed gross to net ratio of 70% and that 50% of the floorspace is for convenience goods and that 50% is for comparison goods.

**Table 4.6: Sandwell MBC LPA Area: Commitments: Comparison Goods**

	CENTRE	PLANNING REF	SCHEME	Gross Floorspace (sq m)	Net Floorspace (sq m)
[1]	West Bromwich-Edge-of-Town Centre	DC/18/62210	Staples Limited Tildasley Street West Bromwich B70 9SJ. Proposed variation of condition 1 of planning permission DC/18/62210 (Proposed change of use to supermarket (Class A1), external alterations including new store access, loading bay extension, trolley bay canopy, and alterations to car park and landscaping) to remove loading bay extension and replace with rear access ramp and new ramp to customer service entrance.	1,973	263
[2]	Great Bridge Town Centre	DC/18/61411	Poundland Unit 1 Great Bridge Retail Park Great Bridge Street West Bromwich B70 0EN. Proposed installation of new mezzanine floor for retail area (290m2 gross floor area).	290	203
[3]	Smethwick Local Centre - Town Centre	DC/20/64854	15 Tollhouse Way; Smethwick; B66 1HJ. Proposed demolition of derelict garage and erection of 3 storey building to create 3 No. commercial ground floor units and 6 No. apartments above.	182	64
[4]	Oldbury Town Centre- Out-of-Centre	DC/20/64517	Former Toys R Us; Wolverhampton Road, Oldbury. Proposed demolition of existing entrance, sub-division of existing retail unit (Class A1) together with external alterations, new shop frontage and cladding, mezzanine floor in Unit 1, creation of ancillary external garden centre area for Unit 2,	564	395
[5]	Tipton Local Centre-In-Centre	DC/19/63355	Unit 12 - 16; Unity Walk; Tipton; DY4 8QL. Proposed change of use to shops (Class A1).	425	149
[6]	Oldbury Town Centre	DC/19/63208	Former Perrott Arms; 2 Birmingham Road; Oldbury; B69 4ED. Proposed change of use and two storey rear extension to create 3 No. shops at ground floor and 2 No. one bedroom flats above.	205	72
[7]	Tipton Local Centre-In-Centre	DC/19/63355	Unit 12 - 16 Unity Walk Tipton DY4 8QL. Proposed change of use to shops (Class A1).	430	151
[8]	Out-of-Centre: Wolverhampton Road	DC/20/64517	Former Toys R Us, Wolverhampton Road, Oldbury. Proposed demolition of existing entrance, sub-division of existing retail unit (Class A1) together with external alterations, new shop frontage and cladding, mezzanine floor in Unit 1, creation of ancillary external garden centre area for Unit 2, construction of extension to form new unit for assembly and leisure use (Class D2), and construction of a standalone cafe/drive-thru restaurant, with associated landscaping and alterations to existing car park and internal vehicle circulation.	2,386	1,670
<b>TOTAL</b>				<b>6,455</b>	<b>2,966</b>

Notes:

- [1] Aldi application, as per planning and retail statement net sales area of 1,315. It is assumed that of this 80% of all the floorspace is for convenience good and that remainder 20% is for comparison goods.
- [2] The gross floorspace is 290 sqm to which a gross to net ratio of 70% has been applied.
- [3] Assumed gross to net ratio of 70% and that 50% of the floorspace is for convenience goods and that 50% is for comparison goods.
- [4] The gross floorspace for the proposed garden centre is 564 sqm to which a gross to net ratio of 70% has been applied.
- [5] Assumed gross to net ratio of 70% and that 50% of the floorspace is for convenience goods and that 50% is for comparison goods.
- [6] Assumed gross to net ratio of 70% and that 50% of the floorspace is for convenience goods and that 50% is for comparison goods.
- [7] Assumed gross to net ratio of 70% and that 50% of the floorspace is for convenience goods and that 50% is for comparison goods.
- [8] The gross floorspace is 2,386 sqm to which a gross to net ratio of 70% has been applied.

4.22 The major planned / committed retail schemes in the Walsall Council area are:

**Table 4.7: Walsall LPA Area: Commitments: Convenience Goods**

	CENTRE	PLANNING REF	SCHEME	Gross Floorspace (sq m)	Net Floorspace (sq m)
[1]	Willenhall Town Centre-In-Centre	18/0438	Proposed demolition of existing class A1 retail (Budgens) store. Erection of new class A1 retail store (Aldi) with associated amendments to access.	1,831	195
[2]	Birchills Local Centre	18/0460	15 Old Birchills, Walsall, WS2 8QH. Change of Use from A4 to A1 (Costcutter) with external installation of plant and machinery to accommodate internal refrigeration.	292	204
[3]	Brownhills Town Centre	17/1629	Land Between 75-85 High Street, Brownhills. New 2.5 storey development of 3 commercial units and 3 x 1 bed flats	171	60
[4]	Darlaston (Out-of-Centre)	18/1494	Demolition of existing petrol station and construction of new shop and forecourt to include 3 x new pump islands, canopy including parking	230	121
<b>TOTAL</b>				<b>2,524</b>	<b>580</b>

Notes:

- [1] Built-out, the net additional floorspace proposed is 278sqm gross (Existing: 1,553 sqm and proposed 1,831 sqm); the applied gross to net ratio of 70% and that all of this space is for convenience goods.
- [2] Built-out, assumed gross to net ratio of 70% and that all the floorspace is for convenience goods.
- [3] Assumed gross to net ratio of 70% and that 50% of the floorspace is for convenience goods and that 50% is for comparison goods.
- [4] Built-out, Council has stated that net new convenience goods space amounts to 121 sqm.

**Table 4.8: Walsall LPA Area: Commitments: Comparison Goods**

	CENTRE	PLANNING REF	SCHEME	Gross Floorspace (sq m)	Net Floorspace (sq m)
[1]	Brownhills Town Centre	17/1629	Land Between 75-85 High Street, Brownhills. New 2.5 storey development of 3 commercial units and 3 x 1 bed flats	171	60
<b>TOTAL</b>				<b>171</b>	<b>60</b>

Notes:

- [1] Assumed gross to net ratio of 70% and that 50% of the floorspace is for convenience goods and that 50% is for comparison goods.

4.23 The turnover of the above is discounted from residual expenditure in order to estimate net residual expenditure from which forecast new retail floorspace is identified (as detailed in the next section).

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## 5. Retail Needs Assessment: 2022 Update

- 5.1 This section sets out the updated results of the quantitative need (capacity) for new retail floorspace (comparison and convenience goods) under Class E(a) (former use class A1) across the BCLA over the period to 2039. The results update the capacity findings of both the 2020 Centres Study and subsequent 2021 Update. It also updates the population projections, expenditure forecasts and commitments.

### Methodology

- 5.2 The update is based on the CREAT<sup>e</sup> model and draws on the most up to date population and average retail (convenience and comparison goods) expenditure reviewed in **Section 4**. The forecasts are presented for the individual BCLA with breakdowns by centres and locations (tier-one strategic centres, tier-two town centres<sup>25</sup>, tier-three district and local centres and finally out-of-centre locations). As emphasised in our previous reports, any potential out-of-centre 'capacity' does not support the need for future out-of-centre provision, but should be subject to the national and local 'centres first' policy steer.
- 5.3 The capacity forecasts will enable the BCLA to test the strategic options for the spatial distribution of any new retail-led development to 2039 and make informed policy choices about where any forecast need should be met in accordance with the advice set out in NPPF paragraph 86(d). The potential inclusion in Local Plans of any retail targets and any allocations of sites to meet any identified need will depend on a range of key considerations, including the suitability, viability and availability of sites in or on the edge of existing centres.
- 5.4 It has necessarily been assumed for the purpose of this strategic capacity assessment that the BCLA's (convenience and comparison goods) retail market is in 'equilibrium' at the base year. In other words we assume that existing centres and stores are broadly trading in line with appropriate 'benchmark' turnover levels at the base year and based on adjusted market shares for new store openings. Therefore, any residual expenditure available to support new retail floorspace within the study area over the period to 2039 is derived from the difference between the forecast growth in 'current' (survey-derived) turnover levels; and the growth in 'benchmark' turnovers based on applying year-on-year 'productivity' ('efficiency') growth rates to all existing and new retail floorspace. This is an established, reasonable and robust approach to inform a study and plan of this nature and scope and has been used in other similar planning contexts such as the evidence retail studies for

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<sup>25</sup> Including Walsall's District Centres



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Oxford City Council (adopted June 2020) and Milton Keynes City Council (adopted March 2019)<sup>26</sup>.

- 5.5 For all existing and new convenience floorspace we have assumed an annual average 'productivity' growth rate of 0.3% from 2023 onwards to 2039. Corresponding annual productivity growth for comparison floorspace is higher, ranging from 2.2% (2023) to 2.4% (2024-28) and 2.9% (2029 and onwards to 2039). These growth rates have been informed by Experian's latest Briefing Note 19 (January 2022).
- 5.6 As with the 2021 update, we advise the BCLA that the greatest weight should be placed on the short-term forecasts (carried out up to a five year period), which can also assist with Development Management decisions. This is because adjustments to long term trends (such as in the economic, demographic, consumer demand and retail property market) could influence key assumptions and forecasts of potential retail capacity. For example, the pandemic illustrated the rapid changing pace in consumer behaviour and the current cost of living crisis will also impact patterns further. As discussed previously, a higher growth in non-store retail sales (i.e. online sales) than forecast by Experian would reduce the capacity for new retail floorspace over time even further. Whilst capacity forecasts covering a shorter period of time are more certain, notwithstanding this, and also consistent with the NPPF, account should also necessarily be taken of the forecast growth over a longer period (at least ten years ahead) as set out below.

### Retail Capacity Forecasts

- 5.7 In order to robustly assess the potential capacity for new convenience goods floorspace up to 2039 we have necessarily tested the same two trading scenarios as per the 2020 and 2021 Centres Studies:
- **'Superstore format' trading scenario** – assuming the residual expenditure could support one of the 'top 6' foodstore operators (i.e. Tesco, Sainsbury's, Asda, Morrisons, Waitrose and Marks & Spencer), which together could achieve an average sales density of approximately £12,500 per sqm in 2022 (2020 prices); and
  - **'Supermarket/discounter' trading scenario** – assuming the residual expenditure is taken up by a supermarket (e.g. Co-op, Budgens, etc.) trading at a slightly lower average sales level of circa £7,000 per sq.m in 2022.
- 5.8 For comparison goods it is assumed that new floorspace will achieve average sales levels of circa £6,000 per sqm in 2022.

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<sup>26</sup> The 'productivity' growth rates are based on Experian's latest Retail Planner Briefing Note 19 (January 2022). However, it should be noted that individual centres, stores and shopping facilities will be capable of achieving higher and/or lower annual 'productivity' growth depending on a range of trading factors (including the size, quality and type of retail floorspace).

- 5.9 As stated previously, it has been assumed that the local retail market is in 'equilibrium' at the base year, which is a robust approach to this type of assessment. Any further available quantitative, or qualitative evidence indicating whether retail locations at the local level are significantly over and/ or under trading could help inform future policy considerations in Local Plans beyond the scope of the BCP, particularly Development Management decisions.
- 5.10 The baseline average sales levels for all new and existing convenience and comparison goods floorspace will experience a year-on-year growth in turnover 'efficiency' (floorspace 'productivity') levels in line with the latest forecasts set out in Experian's Retail Planner Briefing Note 19 (Figures 3a and 3b).

### City of Wolverhampton LPA Area: Capacity Forecasts

- 5.11 The following sets out the convenience and comparison goods capacity forecasts for the main centres and stores in the City of Wolverhampton LPA area. The detailed capacity tabulations for convenience and comparison goods are set out in Appendix 5A and 9A (Volume 2) respectively.

#### Convenience Capacity

- 5.12 Table 3 (**Appendix 5A, Volume 2**) sets out the total residual capacity for new convenience goods floorspace and the table below summarises the convenience goods capacity for the main centres and stores over the period to 2039.

**Table 5.1: City of Wolverhampton LPA Area: Convenience Goods Capacity (Net sqm) Forecasts by Location**

CENTRE TYPE	STORE FORMAT							
	Foodstore Format (sqm net)				Local Supermarket/ Deep Discounter Format (sqm net)			
	2024	2029	2034	2039	2024	2029	2034	2039
<b>Residual Expenditure (after Commitments) (£m)</b>	<b>-£30.7</b>	<b>-£25.2</b>	<b>-£19.4</b>	<b>-£12.7</b>	<b>-£30.7</b>	<b>-£25.2</b>	<b>-£19.4</b>	<b>-£12.7</b>
Strategic Centre    Wolverhampton	-102	12	128	257	-183	21	229	459
Town Centre        Bilston	-261	-201	-139	-72	-465	-358	-249	-129
Wednesfield	2	5	9	13	3	10	16	24
District & Local Centres	-253	-150	-46	69	-451	-269	-82	123
Out-of-Centre	-1,834	-1,644	-1,450	-1,236	-3,274	-2,935	-2,589	-2,207
<b>CITY OF WOLVERHAMPTON COUNCIL AREA</b>	<b>-2,448</b>	<b>-1,977</b>	<b>-1,498</b>	<b>-969</b>	<b>-4,371</b>	<b>-3,531</b>	<b>-2,675</b>	<b>-1,730</b>

- 5.13 As with the all previous assessments, the capacity findings across both foodstore formats indicates no identified LPA area-wide capacity up to 2039.
- 5.14 In terms of the various locations:

- The ‘Strategic Centre’ of Wolverhampton City Centre - no forecast in the short term with vary nominal amount to 2029 and over the 10+ years to 2034 between 128 sqm net and 229 sqm net. Over the long term to 2039 some 257 sqm to 459 sqm net is identified. This need could be met through e.g. infill development, change of use applications and/or extensions to existing stores, without the need to identify larger comprehensive development at in-centre or edge-of-centre sites.
- The ‘Town Centres’ of Bilston and Wednesfield - no overall forecast capacity.
- The ‘District & Local Centres’ – shows a very modest capacity forecast albeit over the long term to 2039 (of some 69 sqm to 123 sqm net). Again, this could easily be met through e.g. infill development, change of use applications and/or extensions to existing stores, without the need to identify larger comprehensive development at in-centre or edge-of-centre sites
- The out-of-centre category shows no identified capacity over the forecast period to 2039.

### **Comparison Capacity**

5.15 Table 3 (**Appendix 9A, Volume 2**) sets out the total LPA area-wide capacity for new comparison goods floorspace after allowing for the turnover of all known commitments. Tables 4-8 disaggregate this total capacity by centre.

5.16 The table below summarises the comparison goods capacity for the main centres and stores and shows no overall identified capacity over the period to 2039. There is very modest floorspace capacity over the longer term to 2039 within the town and district centres (some 104 sqm net collectively) which could be met e.g. through change of use applications and/or extensions to existing stores, without the need to identify larger comprehensive development at in-centre or edge-of-centre sites.

**Table 5.2: City of Wolverhampton LPA Area: Comparison Goods Capacity (Net sqm) Forecasts by Location**

<b>CENTRE TYPE</b>		<b>2024</b>	<b>2029</b>	<b>2034</b>	<b>2039</b>
<b>Residual Expenditure (after Commitments) (£m)</b>		<b>-£23.0</b>	<b>-£27.0</b>	<b>-£30.5</b>	<b>-£22.8</b>
Strategic Centre	Wolverhampton	-2,737	-2,822	-2,771	-1,989
Town Centre	Bilston	-23	-35	-28	81
	Wednesfield	-5	-8	-6	18
District & Local Centres		-48	-54	-51	4
Out-of-Centre		-847	-884	-862	-528
<b>CITY OF WOLVERHAMPTON COUNCIL AREA</b>		<b>-3,661</b>	<b>-3,803</b>	<b>-3,717</b>	<b>-2,414</b>

## Dudley MBC LPA Area: Capacity Forecasts

5.17 The following sets out the convenience and comparison goods capacity forecasts for the main centres and stores in the Dudley MBC LPA area. The detailed capacity tabulations for convenience and comparison goods are set out in **Appendix 5B** and **9B (Volume 2)** respectively.

### Convenience Capacity

5.18 Table 3 (**Appendix 5B, Volume 2**) sets out the total residual capacity for new convenience goods floorspace after allowing for the turnover of all known commitments. Tables 4-8 disaggregate this total capacity for the 'strategic centre' (i.e. Brierley Hill); 'town centres' (i.e. Dudley, Stourbridge & Halesowen), collectively the smaller 'district & local centres' and the 'out-of-centre' retail floorspace.

5.19 The table below summarises the convenience goods capacity for the main centres and stores over the period to 2039.

**Table 5.3: Dudley MBC LPA Area: Convenience Goods Capacity (Net sqm) Forecasts by Location**

CENTRE TYPE	STORE FORMAT							
	Foodstore Format (sqm net)				Local Supermarket/ Deep Discounter Format (sqm net)			
	2024	2029	2034	2039	2024	2029	2034	2039
<b>Residual Expenditure (after Commitments) (£m)</b>	<b>-£29.0</b>	<b>-£22.5</b>	<b>-£15.6</b>	<b>-£7.7</b>	<b>-£29.0</b>	<b>-£22.5</b>	<b>-£15.6</b>	<b>-£7.7</b>
Strategic Centre Brierley Hill (Traditional High St +Merry Hill)	27	85	145	210	47	152	258	376
Town Centre Dudley	-1,031	-1,009	-987	-963	-1,840	-1,802	-1,763	-1,720
Stourbridge	36	117	198	288	65	208	354	515
Halesowen	20	64	108	158	36	114	194	282
District & Local Centres	52	167	285	414	93	299	508	739
Out-of-Centre	-1,413	-1,185	-953	-697	-2,523	-2,116	-1,702	-1,245
<b>DUDLEY MBC AREA</b>	<b>-2,308</b>	<b>-1,761</b>	<b>-1,205</b>	<b>-590</b>	<b>-4,122</b>	<b>-3,145</b>	<b>-2,151</b>	<b>-1,053</b>

5.20 The global capacity findings for both the '*superstore format*' and new '*supermarket/discounter format*' indicate no capacity for new convenience goods floorspace until 2039.

5.21 The strategic centre (comprising the Traditional High Street and Merry Hill) shows a nominal quantum over the 10+ year period to 2034 of some 145 sqm net and 258 sqm net. This need could be through infill development, change of use applications and/or extensions to existing stores, without the need to identify larger comprehensive development in-centre or edge-of-centre sites.

5.22 Within the town centres of Stourbridge and Halesowen as well as the district & local centres there is identified capacity (between 860 sqm net and 1,536 sqm net) collectively over the period to 2039. This could support two small format foodstores or a discount store by 2039. However as recognised in the previous 2021 Update, there is a specific qualitative need for a large anchor foodstore to serve Dudley Town Centre which would potentially absorb this capacity. The out-of-centre category shows no identified capacity over the forecast period to 2039.

### **Comparison Capacity**

5.23 Table 3 (**Appendix 9B, Volume 2**) sets out the total LPA area-wide capacity for new comparison goods floorspace after allowing for the turnover of all known commitments. The table below summarises the comparison capacity for the main centres and stores over the period to 2039. It shows no overall capacity to 2039 after allowing for all known commitments. Very modest quantum is identified over the long term by 2039 with the town centres of Stourbridge, Halesowen and the district and local centres (collectively some 235 sqm net). As it is recognised that there is a specific qualitative need for a large anchor foodstore to serve Dudley Town Centre, comparison goods retail provision is likely to be a part of the overall offer that is likely to absorb this capacity.

**Table 5.4: Dudley MBC LPA Area: Comparison Goods Capacity (Net sqm) Forecasts by Location**

<b>CENTRE TYPE</b>	<b>2024</b>	<b>2029</b>	<b>2034</b>	<b>2039</b>
<b>Residual Expenditure (after Commitments) (£m)</b>	<b>-£20.3</b>	<b>-£24.6</b>	<b>-£27.2</b>	<b>-£11.1</b>
Strategic Centre Brierley Hill (Traditional High St +Merry Hill)	-986	-1,157	-1,054	514
Town Centre Dudley	-1,979	-1,993	-1,984	-1,853
Stourbridge	-28	-43	-34	98
Halesowen	-22	-33	-27	77
District & Local Centres	-17	-26	-21	60
Out-of-Centre	-194	-208	-200	-73
<b>DUDLEY MBC AREA</b>	<b>-3,227</b>	<b>-3,461</b>	<b>-3,319</b>	<b>-1,177</b>

### **Sandwell MBC LPA Area: Capacity Forecasts**

5.24 The following sets out the convenience and comparison goods capacity forecasts for the main centres and stores in the Sandwell MBC LPA area. The detailed capacity tabulations for convenience and comparison goods are set out in **Appendix 5C and 9C (Volume 2)** respectively.

## Convenience Capacity

- 5.25 Table 3 (**Appendix 5C, Volume 2**) sets out the total residual capacity for new convenience goods floorspace after allowing for the turnover of all known commitments. Tables 4-8 disaggregate this total capacity for the 'strategic centre' (i.e. West Bromwich); 'town centres' (i.e. Blackheath, Cradley Heath, Great Bridge, Oldbury, Wednesbury, Cape Hill & Bearwood), collectively the smaller 'district & local centres' and the out-of-centre retail floorspace.
- 5.26 The table below summarises the convenience goods capacity for the main centres and stores over the period to 2039.

**Table 5.5: Sandwell MBC LPA Area: Convenience Goods Capacity (Net sqm) Forecasts by Location**

CENTRE TYPE		STORE FORMAT							
		Foodstore Format (sqm net)				Local Supermarket/ Deep Discounter Format (sqm net)			
		2024	2029	2034	2039	2024	2029	2034	2039
<b>Residual Expenditure (after Commitments) (£m)</b>		<b>-£28.2</b>	<b>-£21.2</b>	<b>-£13.8</b>	<b>-£5.5</b>	<b>-£28.2</b>	<b>-£21.2</b>	<b>-£13.8</b>	<b>-£5.5</b>
Strategic Centre	West Bromwich	-1,306	-1,240	-1,172	-1,097	-2,333	-2,214	-2,092	-1,958
Town Centre	Blackheath	18	57	97	141	32	102	173	252
	Cradley Heath	-35	12	59	112	-63	21	106	199
	Great Bridge	-3	63	132	207	-6	113	235	369
	Oldbury	-265	-224	-182	-136	-473	-399	-325	-242
	Wednesbury	-34	-7	20	51	-61	-13	36	90
	Cape Hill	21	68	116	169	38	122	208	302
	Bearwood	11	36	61	89	20	64	110	160
District & Local Centres		-367	-294	-220	-138	-655	-525	-392	-246
Out-of-Centre		-284	-134	18	186	-507	-240	32	332
<b>SANDWELL MBC AREA</b>		<b>-2,244</b>	<b>-1,662</b>	<b>-1,070</b>	<b>-415</b>	<b>-4,007</b>	<b>-2,968</b>	<b>-1,910</b>	<b>-741</b>

- 5.27 The global capacity findings for both the '*superstore format*' and new '*supermarket/discounter format*' indicate no capacity for new convenience goods floorspace over the period to 2039.
- 5.28 The capacity identified for individual centres collectively over the 10+ year period to 2034 is between 504 sqm (foodstore format) and 899 sqm net (discount format). By 2039 this increases to 791 sqm (foodstore format) and 1,705 sqm net by 2039 (discount format). Potentially this could support one small, large format foodstore by 2034. However, this could also be met through infill development, change of use applications and/or extensions to existing stores, without the need to identify larger comprehensive development in-centre or edge-of-centre sites.

### Comparison Capacity

5.29 Table 3 (**Appendix 9C, Volume 2**) sets out the total LPA area-wide capacity for new comparison goods floorspace after allowing for the turnover of all known commitments. Tables 4-8 disaggregate this total capacity by centre. The table below summarises the comparison capacity for the main centres and stores over the period to 2039.

**Table 5.6: Sandwell MBC LPA Area: Comparison Goods Capacity (Net sqm) Forecasts by Location**

CENTRE TYPE		2024	2029	2034	2039
<b>Residual Expenditure (after Commitments) (£m)</b>		<b>-£13.0</b>	<b>-£15.7</b>	<b>-£17.5</b>	<b>-£8.1</b>
Strategic Centre	West Bromwich	-240	-273	-253	50
Town Centre	Blackheath	-11	-16	-13	37
	Cradley Heath	-3	-4	-3	9
	Great Bridge	-112	-117	-114	-66
	Oldbury	-69	-86	-76	79
	Wednesbury	-13	-20	-16	45
	Cape Hill	-7	-10	-8	23
	Bearwood	-9	-14	-11	32
District & Local Centres		-191	-196	-193	-149
Out-of-Centre		-1,423	-1,480	-1,446	-920
<b>SANDWELL MBC AREA</b>		<b>-2,076</b>	<b>-2,215</b>	<b>-2,131</b>	<b>-861</b>

5.30 The table shows no capacity to 2039 after allowing for all known commitments. As with convenience goods, the modest capacity identified for individual centres up to 2039 (collectively some 274m sqm net) could easily be met through infill development, change of use applications and/or extensions to existing stores, without the need to identify larger comprehensive development in-centre or edge-of-centre sites.

### Walsall LPA Area: Capacity Forecasts

5.31 The following sets out the convenience and comparison goods capacity forecasts for the main centres and stores in the Walsall LPA area based on an analysis of population, expenditure and turnover growth over the forecast period, and the predicted trading performance of all known retail commitments. The detailed capacity tabulations for convenience and comparison goods are set out in **Appendix 5D and 9D (Volume 2)** respectively.

## Convenience Capacity

- 5.32 Table 3 (**Appendix 5D, Volume 2**) sets out the total residual capacity for new convenience goods floorspace after allowing for the turnover of all known commitments. Tables 4-8 disaggregate this total capacity for the 'strategic centre' (i.e. Walsall); 'town centres' (i.e. Bloxwich, Brownhills, Aldridge, Willenhall, Darlaston), collectively the smaller 'district & local centres' and the 'out-of-centre' retail floorspace.
- 5.33 The table below summarises the convenience goods capacity for the main centres and stores over the period to 2039.

**Table 5.7: Walsall LPA Area: Convenience Goods Capacity (Net sqm) Forecasts by Location**

CENTRE TYPE		STORE FORMAT							
		Foodstore Format (sqm net)				Local Supermarket/ Deep Discounter Format (sqm net)			
		2024	2029	2034	2039	2024	2029	2034	2039
<b>Residual Expenditure (after Commitments) (£m)</b>		<b>-£4.1</b>	<b>£0.9</b>	<b>£6.2</b>	<b>£12.2</b>	<b>-£4.1</b>	<b>£0.9</b>	<b>£6.2</b>	<b>£12.2</b>
Strategic Centre	Walsall	35	113	192	279	63	202	343	499
Town Centre	Bloxwich	15	49	83	120	27	87	148	215
	Brownhills	-31	18	67	121	-55	32	120	217
	Aldridge	21	66	113	164	37	119	202	294
	Willenhall	-150	-103	-56	-3	-268	-184	-99	-6
	Darlaston	15	48	81	118	27	85	145	212
District & Local Centres		-167	-140	-112	-81	-299	-250	-200	-145
Out-of-Centre		-67	20	108	206	-120	36	194	368
<b>WALSALL MBC AREA</b>		<b>-329</b>	<b>70</b>	<b>477</b>	<b>926</b>	<b>-587</b>	<b>125</b>	<b>851</b>	<b>1,653</b>

- 5.34 The capacity findings under the '*superstore format*' shows a capacity of 477 sqm net over the 10+ year period to 2034 (which could support up to one small, large format foodstore) rising to 926 sqm net for new convenience goods floorspace by 2039 after taking into account all known commitments (which could support up to two small format large foodstores).
- 5.35 Turning to the forecast capacity for new '*supermarket/discounter format*' floorspace, the table shows a forecast capacity of 851 sqm net over the 10+ year period to 2034 and 1,653 sqm net by 2039 (supporting one discount store).
- 5.36 In terms of the strategic centre of Walsall, the identified capacity is some 192 sqm net by 2034 rising to 279 sqm net by 2039. Under the '*supermarket/discounter format*' the identified capacity is some 343 sqm net by 2034 rising to 499 sqm net by 2039.
- 5.37 The capacity that has been identified for the other centres and locations is as follows:
- Town centres: Cumulatively 521 sqm net by 2039 (up to one small format store foodstore).
  - The smaller 'district & local centres' show no identified capacity.



- The 'out-of-centre' floorspace generates a capacity of up to 108 sqm in 2034 and 206 sqm net by 2039 under the 'superstore' format. Whilst under the 'supermarket/discounter' format the identified capacity is 194 sqm net by 2034 rising to 368 sqm net by 2039. It should be emphasised that any out-of-centre 'capacity' does not support the need to plan for any future out-of-centre provision, but capacity should be subject to the national and local 'centres first' policy steer (see paragraphs 5.42 below). The quantum of any forecast capacity identified could easily be met through infill development, change of use applications and/or extensions to existing stores, without the need to identify larger comprehensive development in-centre or edge-of-centre sites.

### Comparison Capacity

5.38 Table 3 (Appendix 5D, Volume 2) sets out the total LPA area-wide capacity for new comparison goods floorspace after allowing for the turnover of all known commitments. Tables 4-10 disaggregate this total capacity by centre. The table below summarises the comparison capacity for the main centres and stores over the period to 2039.

**Table 5.8: Walsall LPA Area: Comparison Goods Capacity (Net sqm) Forecasts by Location**

CENTRE TYPE		2024	2029	2034	2039
<b>Residual Expenditure (after Commitments) (£m)</b>		<b>-£1.3</b>	<b>-£2.1</b>	<b>-£2.0</b>	<b>£5.3</b>
Strategic Centre	Walsall	-101	-153	-122	352
Town Centre	Bloxwich	-10	-15	-12	36
	Brownhills	-46	-50	-48	-17
	Aldridge	-13	-19	-15	44
	Willenhall	-10	-14	-11	33
	Darlaston	-3	-5	-4	12
District & Local Centres	-4	-6	-5	15	
Out-of-Centre	-26	-39	-31	90	
<b>WALSALL MBC AREA</b>		<b>-213</b>	<b>-302</b>	<b>-248</b>	<b>564</b>

5.39 The table shows no forecast capacity (after allowing for all known commitments) to 2034. Capacity emerges by 2039 of some 564 sqm net with the strategic centre of Walsall accounting for the majority 352 sqm net. This could easily be met through infill development, change of use applications and/or extensions to existing stores, without the need to identify larger comprehensive development in-centre or edge-of-centre sites.

## BCLA Area Summary

5.40 In terms of the BCLA area overall and after accounting for all known commitments there is no identified convenience or comparison goods capacity overall within the BCLA area.

**Table 5.9: BCLA Area: Aggregated Convenience Goods Capacity (Net sqm) Forecasts**

LPA	Foodstore Format (sqm net)				Local Supermarket/ Deep Discounter Format (sqm net)			
	2024	2029	2034	2039	2024	2029	2034	2039
<b>Wolverhampton</b>	-2,448	-1,977	-1,498	-969	-4,371	-3,531	-2,675	-1,730
<b>Dudley</b>	-2,308	-1,761	-1,205	-590	-4,122	-3,145	-2,151	-1,053
<b>Sandwell</b>	-2,244	-1,662	-1,070	-415	-4,007	-2,968	-1,910	-741
<b>Walsall</b>	-329	70	477	926	-587	125	851	1,653
<b>TOTAL: BCLA AREA</b>	<b>-7,329</b>	<b>-5,331</b>	<b>-3,296</b>	<b>-1,048</b>	<b>-13,087</b>	<b>-9,519</b>	<b>-5,885</b>	<b>-1,871</b>

**Table 5.10: BCLA Area: Aggregated Comparison Goods Capacity (Net sqm) Forecasts**

LPA	2024	2029	2034	2038
<b>Wolverhampton</b>	-3,661	-3,803	-3,717	-2,414
<b>Dudley</b>	-3,227	-3,461	-3,319	-1,177
<b>Sandwell</b>	-2,076	-2,215	-2,131	-861
<b>Walsall</b>	-213	-302	-248	564
<b>TOTAL: BCLA AREA</b>	<b>-9,178</b>	<b>-9,781</b>	<b>-9,417</b>	<b>-3,888</b>

5.41 Despite showing no capacity, this does not preclude facilitating any further future investment and improvements to the strategic, town, district or local centres.

## Strategic Allocations

5.42 The 2020 Centres Study assessed the potential net effect of Strategic Allocations (detailed overleaf).

**Table 5.11: Strategic Allocations by LPA: Retail**

**LPA: Wolverhampton**

**Wolverhampton City Centre Area Action Plan (adopted 2016):**

Goods Type / Sector	Policy Ref	Quantum (sqm Gross)	Quantum (sqm net)	Delivery Date
Comparison	Policy CC1	35,000	N/A	by 2026
Convenience	Policy CC1	12,000	N/A	by 2026

**LPA: DUDLEY**

**Brierley Hill Strategic Centre Area Action Plan (adopted August 2011)**

Goods Type / Sector	Policy Ref	Quantum (sqm Gross)	Quantum (sqm net)	Delivery Date
Comparison	Policy 66	6,500	N/A	by 2021
Comparison	Policy 67	2,000	N/A	by 2021
Convenience	Policy 3	4,600	3,000	N/A
Convenience	Policy 7	3,000	2,000	N/A

**Dudley Town Centre AAP (adopted March 2017)**

Goods Type	Policy Ref	Quantum (sqm Gross)	Quantum (sqm net)	Delivery Date
Comparison	Policy 15	15,000	N/A	by 2026
Convenience	Policy 15	N/A	5,000	by 2026

**Walsall Town Centre Area Action Plan (adopted January 2019)**

Goods Type	Policy Ref	Quantum (sqm Gross)	Quantum (sqm net)	Delivery Date
Comparison	Policy AAPS2	6,000	N/A	End of 2026
Convenience	Policy AAPS2	1,500	N/A	End of 2026

- 5.43 Based on the capacity figures identified in this assessment, if these targets were implemented in full, capacity would be eroded further.
- 5.44 Other sources that could cause trade diversion / leakage from the Black Country's centres and thus reduce capacity further, would include any large retail schemes outside the Black Country's administrative area.

**Summary**

- 5.45 The NPPF (paragraph 86d) is clear that local planning authorities should plan to meet the need for new retail and town centre uses by "*looking at least **ten years ahead***". The PPG also states that given the uncertainty in forecasting long-term retail trends and consumer behaviour, assessments "*...may need to focus on a limited period (such as the next five years) but will also need to take the lifetime of the plan into account and be regularly reviewed*"<sup>27</sup>. Therefore, whilst greater weight should be placed on forecasts over the next

<sup>27</sup> Planning Practice Guidance on Town Centres and Retail: Paragraph: 004 Reference ID: 2b-004-20190722

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five to ten-years, we have also assessed the potential capacity for new retail floorspace to 2039, to help inform the BCLA's longer term plan-making and strategies.

- 5.46 As shown, there is no quantitative requirement for the BCLA to identify and allocate new sites for retail development over the ten-year period up to 2032 or over the longer term to 2039. Any capacity for individual centres must be seen in the context of the global capacity. This does not preclude facilitating any further investment or improvements to strategic, town, district or local centres (including making any relevant adjustments to centre boundaries), through plans and strategies/ regeneration schemes beyond the strategic policies of Local Plans.
- 5.47 We re-emphasise our advice in the 2020 Centres Study (e.g. para 9.84), particularly that there is not sufficient capacity to justify including floorspace targets in the strategic policies of Local Plans. A robust policy approach should therefore be adopted, especially development management policies in accordance with the NPPF (paragraphs 86 - 91), to enable the assessment and determination of future proposals that are not in a centre and not in accordance with an up-to-date development plan.
- 5.48 The lack of capacity particularly emphasises the importance of the sequential test and having a locally set threshold for the undertaking of NPPF impact tests, to ensure that edge and/ or out-of-centre proposals avoid causing any significant adverse impacts on centres. Locally set thresholds are adopted by many LPAs (such as London Borough of Havering; Oxford City Council; Milton Keynes City Council); including the existing Black Country Core Strategy (BCCS) threshold of 200sqm (gross). The impact test threshold of 280sqm (gross) for edge and out-of-centre proposals included in the draft BCP would be a reasonable adjustment to the BCCS and reflects the national figure at which stores can be regarded as performing a local function and are also exempt from Sunday trading restrictions (as set out in the 2020 study and 2021 update). The sensitivity testing of proposals with impact tests proportionate to their scale and nature could be informed by further analysis through the Development Management process where relevant, including e.g. any evidence of specific over/ under-trading, and quantitative/ qualitative information, such as relating to the vitality and viability of, and planned investment in, centres. As emphasised in our 2020 Centres Study (paragraph 9.84, 9.113), where individual Councils bring forward plans (such as AAPs / SADs), then the framework provided by the strategic policies of Local Plans may be augmented with a more specific policy steer that could be informed by further evidence.
- 5.49 Given the capacity findings, if any capacity for new retail floorspace should emerge in the future it is likely to be towards the end/beyond 2039 and will have been updated through a plan review. Any such capacity should be directed to the existing network of centres. Councils should explore through tier-two plans identifying a suitable site/sites in and/or on the edge of existing centres, including supporting the repurposing of extensions to, existing

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provision and/or adjusting centre boundaries to meet any forecast need (with a view of at least 10 years), in accordance with the “town centre first” approach detailed in national, and supported in sub-regional and local plan policy and guidance, to ensure the future vitality, viability and regeneration of centres. This could include addressing any specific qualitative need, such as to provide a large anchor foodstore to serve Dudley Town Centre.

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## 6. Office Market

- 6.1 The effect of the pandemic was acutely felt in the office sector as the nation was asked to stay at home. In 2021 the effects started to fade as a return to offices began and at the start of 2022 there was the beginning of some level of consistency. In October 2022, daily office occupancy averaged close to 30% nationally, after levels nearer to 25% had been the norm earlier in the year<sup>28</sup>.
- 6.2 In 2022, the office market has been impacted by high cost inflation and rising finance costs. According to our own research, whilst take-up is only likely to match 2021 levels, the year has seen an improving depth to activity. Rising activity has highlighted the importance of quality provision. The pandemic's legacy of increased hybrid working is pushing occupiers in ever greater numbers to exchange quantum for quality. The pressure to do so has also strengthened on the back of unprecedented rises in energy costs with the added business case for occupying environmentally efficient buildings.
- 6.3 The focus on quality has been reflected emphatically in rental levels, with the delivery of best-in-class product driving a step-change in prime headline rents across a host of regional centres in 2022. Conversely, this emphasis on quality provision points to potentially accelerated rates of obsolescence for 'ordinary'/'poorer' quality space.
- 6.4 The move to quality space is demonstrated regionally by the Birmingham City Centre office market. LSH research indicates that up to third quarter of 2022, Grade 'A' space accounted for a record 74% share of total take-up in 2021, while 2022 at the time of writing this report is on course to post a similar result. The focus on quality over quantum has emerged as a key theme, with several high quality developments providing ample opportunity for occupiers to upgrade; examples including Two Chamberlain Square, 103 Colmore Row and One Centenary Way. Grade 'A' take-up has pushed the city's prime headline rent through the £431/sqm (£40/sq ft) barrier.
- 6.5 However, the provision of new-builds and refurbishments is slowing markedly. High build costs and a sudden pricing correction have stymied developer appetite, meaning new construction starts are forecast to be few and far between in 2023. With an increasing focus on Environmental, Social & Governance (ESG)<sup>29</sup> credentials and staff wellbeing, occupiers may struggle to find a solution to match their ambitions in the near future.

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<sup>28</sup> 'Under Pressure' LSH regional Office 2022 Report (November 2022)

<sup>29</sup> ESG – Environmental, Social & Governance setting a standard to measure a business's impact on society, the environment, and how transparent and accountable it is.

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- 6.6 Major employers are taking widely different approaches to the return to the office. Most companies are navigating a middle ground where hybrid working has been adopted, but an increased level of office attendance is encouraged.
- 6.7 For occupiers in regional UK cities seeking to bring workers back to the office in greater numbers, commuting times may be a less significant obstacle than they are, for example, in London. To build on this advantage, firms will need to provide attractive office environments that encourage workers to actively choose to come in to the office.
- 6.8 As detailed in the '2021 Black Country Centres Study Update', the office market in the BCLA received a significant boost in 2021 when the Government decided to create a second headquarters based in Wolverhampton City Centre for the Department for Levelling Up, Housing and Communities (DLUHC). The chosen headquarters building was i9. The i9 development was completed despite the recent economic challenges, opened in 2021 and is currently fully let. It is the first office building in the Black Country to be awarded a 'WiredScore Gold' certification in recognition of its digital connectivity and infrastructure. It is also 'BREEAM' Excellent rated to guarantee the long-term sustainability of the building and lower any potential impact on the surrounding environment.
- 6.9 The office market in Wolverhampton City Centre has been successfully kick-started with the delivery of the i9 development that emerged following the success of the i10 complex on the opposite side of Railway Drive at the Interchange in the City Centre, with both being delivered by the Council and property developer, Ion. This provides the opportunity to continue to expand the commercial-led office cluster to deliver regeneration.
- 6.10 The infrastructure investment in place in Wolverhampton City Centre will help enhance the significant benefit of being just 15 minutes away from Birmingham by train. The redevelopment of the railway station and the extension of the Midland Metro as part of the Interchange scheme make the centre a more attractive place for business.
- 6.11 The Council's current strategic aspirations for a developing office market are included in a new 'Wolverhampton Investment Prospectus'<sup>30</sup> that was launched in May 2022 at the UK Real Estate, Investment & Infrastructure Forum. In this document the Council aspires to the growth of the Interchange Commercial District to deliver grade 'A' office space on strategic sites at the heart of an integrated regional road, rail and tram hub. This can provide a catalyst to support further investment through the delivery of a complementary mix of uses.
- 6.12 Current office rents in Wolverhampton stand at £114.64/sqm (£10.65/sqft) with a market yield of 8.7% (yields having positively moved in from 11.5% in 2012)<sup>31</sup>. In comparison, as

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<sup>30</sup> Wolverhampton Investment Prospectus (2022) <https://www.investwolverhampton.com/ukreiff/index.htm>

<sup>31</sup> Source: Co-Star

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stated previously, the equivalent for Birmingham City Centre for prime Grade 'A' space has increased to £431/sqm (£40/sq ft) with prime yields at a keen 4.5%<sup>32</sup>.

- 6.13 It is the case that when comparing new centre-based office space Wolverhampton City Centre now performs strongly within the Black Country. The key competition in terms of geography will be Birmingham City Centre with its critical mass and associated infrastructure.
- 6.14 As occupiers focus more on the ESG agenda this may necessitate a movement from older stock. Hence this will be an exercise for the wider BCLA sub-region to determine how more organic levels of demand can facilitate bringing forward new office developments. For both Wolverhampton and other Black Country centres to compete with other larger centres is also dependent on how older stock is retrofitted to satisfy green and ESG credentials. Furthermore, the hybrid working trends described earlier will also affect any demand and market interest.
- 6.15 In our opinion, as the office landscape is changeable, consistent with the 2020 and 2021 reports, we continue to urge caution in predicting the scale of future office development. As office uses will continue to be an important element of centres and future new provision will be market-led, it will be important to help facilitate a supply of a choice of potential sites to provide a catalyst for office clusters, attracting future investment jobs and regeneration. Policies through Tier-Two plans, such as a "reservoir approach" when looking at site-specific supply in centres and supporting offices as part of a wider mix of uses in centres can help facilitate further office growth and contribute to the strategic priorities for the Black Country. We maintain this is a reasonable continuing policy approach.
- 6.16 We understand the BCLA has separately commissioned Warwick Economics and Development (WECD) to update the Black Country Economic Development Needs Assessment (EDNA).
- 6.17 The 2021 EDNA indicated that the Black Country was anticipating an additional 5,538 Full Time Equivalent (FTE) jobs requiring 66,456 sqm to 2039. In the '2021 Black Country Centres Study Update' we had reported that the British Council for Offices (BCO) recommended space standard at the time was 8 sqm to 10 sqm (86 sqft to 108 sqft) for each workspace, not including breakout space or amenity areas. Whilst this was generous, this has subsequently increased further with the BCO reporting a standard of between 10 sqm to 12 sqm (108 sqft to 129 sqft) for the post-pandemic world of work. This accounts for the rise in people working from home and hot-desking when in the office, while simultaneously ensuring the workspace meets modern employers' requirements to promote productivity and wellbeing, as well as targets to minimise carbon emissions. This

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<sup>32</sup> PMA Promis (November 2022)



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will have an impact on any office space quantum but will depend on the end occupier. Professional, scientific and technical services, for example, will accommodate their staff differently to, for example, utilities.

## 7. Commercial Leisure Trends

7.1 As previously described, the Government's reform of the Use Classes Order came into effect on 1<sup>st</sup> September 2020. The table below summarises the impact of these reforms on the classification of the main food and beverage, commercial leisure and cultural uses.

**Table 7.1: 2020 Use Classes Order Update**

Original Use Class <sup>(1)</sup> :	Revised Use Class <sup>(2)</sup> :	Use:	Description:
Class A3	Class E (b)	Restaurants and cafés:	Defined as selling food and drink for consumption on the premises.
Class A4	Sui Generis	Drinking establishments:	Includes public houses, wine bars or other drinking establishments (but not night clubs), and drinking establishments with expanded food provision
Class A5	Sui Generis	Hot food takeaways:	Defined as the sale of hot food for consumption off the premises.
Class D1	Class F.1	Non-residential institutions:	Includes art galleries (other than for sale or hire) and museums.
Class D2	Sui Generis	Leisure/Recreation (indoor/outdoor)	Cinemas, music and concert halls, bingo and dance halls
Class D2	Class E (d)		Gymnasiums or area for indoor recreations.
Class D2	Class F.2		Indoor or outdoor swimming baths, skating rinks and outdoor sports/recreations.
Sui Generis	Sui Generis	A use on its own	Theatres, nightclubs, casinos

(1) Town and Country Planning (Use Classes) Order 1987 (as amended)

(2) Revised Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020 (SI 2020 No.757).

7.2 Parts A and D of the original Schedule to the Use Classes Order have been removed, with Use Classes A1, A2, A3, parts of D1 and D2 subsumed into new Use Class E. Changes of use within this new Class E do not constitute development.

7.3 In terms of leisure expenditure, The table below shows the most recent leisure spend projections by Experian Business Strategies (EBS) as set out in Retail Planner Briefing Note 19 (January 2022).

**Table 7.2 Leisure Spend and Projections (year-on-year growth %)**

	2017	2018	2019	2020	2021	2022	2023	2024-28	2029-40
Leisure Spend Growth (%)	1.3	-1.8	1.1	-37.2	21.9	24.1	1	1.1	0.9

7.4 Following a dramatic -37.2% fall in leisure spend per head in 2020, Experian forecast a return to growth in 2022 (+24.1%). Average yearly growth is then forecast to settle at

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approximately +1.1% over the period 2024-2028 and +0.9% over the long term (2029-2040). This growth in leisure spend is higher than the long term trend of -2.4% per annum over the period 1997-2020. Any further dampening of growth rates over the short to medium term will have implications for the viability of existing leisure businesses and the demand for new space.

- 7.5 Retail, hospitality and leisure have been among the hardest hit sectors during the pandemic forcing many businesses to quickly adapt their business models to accommodate extraordinary trading conditions. Whilst it is too soon to assess the impact on footfall and sales, both, will take time to get back close to pre-pandemic levels. By way of example, the 'Eat Out to Help Out' initiative was a significant success in the summer of 2020 which boosted the sector through a 50% discount to customers being underwritten by the UK Government. Success in the future will be contingent on type and location of destination. For example major city centres and tourism destinations where commuters and tourists are a driver of footfall and spending are likely to recover slowly. According to Springboard<sup>33</sup>, 2021 saw an increase in footfall to Food & Beverage outlets to 27.3% in 2021 from 22% in 2020. Visits to hospitality outlets rose significantly as restrictions were lifted and the vaccination programme rolled forward.
- 7.6 It is anticipated that the post-pandemic demand for commercial leisure is unlikely to decline. However there is the likelihood that there will be an increase in business failures and closures during 2022/23 due to the impact of:
- increasing inflation resulting in a decrease in spending;
  - the rise in the energy price cap; and
  - a rise in National Insurance Contributions.
- 7.7 Consumer leisure spending indicates a fragile recovery due to the impact of the pandemic on sales; profit margins and as rising debts deepen. The sector is dependent on the availability of disposable income which in turn is dependent on broader economic recovery and prevailing consumer confidence. A downturn will suppress consumer spending on leisure. Furthermore from 1 April 2022, hotels, restaurants and other hospitality firms have had to start paying business rates again, as well as VAT at the full rate of 20%, following the reduction to 5% at the start of the pandemic and later 12.5%.
- 7.8 Although the UK appears to be emerging from the pandemic, to somewhat of normality, many consumers are still wary of social interaction. Foodservices are likely to cater to this more, with meal kits and digital cooking. It is also predicted that there will be a greater focus on convenient healthy food and drink as people are reconnecting with their health, as the pandemic caused many to turn to convenient comfort food. Therefore, food

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<sup>33</sup> Springboard's Annual Review: The Year That Was 2021 (February 2022)

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consumption will become digital, tailored around personalised preferences through apps and smartphones which may enable consumers to take more control of their food and what matters most to them such as the ingredients, ethics, pricing and carbon footprint.

- 7.9 **Food and Beverage** consumers are now seeking more clarity and transparency to inform their decisions, for example in the UK, 48% of consumers believe buying British produce is important; or brands that are more climate-friendly and ethical. Consumers now want more novel experiences that amplify the flavours, colours, textures, aromas and interactivity that food and drink can provide. Flexible spaces are becoming more popular with restaurants creating multifunctional and meaningful spaces, imaginatively using food, drink and foodservice venues as places where consumers can spend time, express themselves and meet new people.
- 7.10 The **cinema** sector was hit particularly hard during the pandemic as a result of multiple lockdowns. This increased the number of people watching films via online streaming services. In broad terms the cinema market will continue to compete with streaming services as the optimum place to see films. The market size, measured by revenue, of the cinema industry is estimated at £1.0bn in 2022<sup>34</sup>. The number of people that choose to visit the cinema is the most significant factor in industry revenue and profit levels. Higher numbers of cinema admissions increase box office revenue and support higher concession stands sales. In 2022-23, cinema admissions are forecast to rise, presenting an opportunity for the industry.
- 7.11 Overall cinema attendance is now returning to pre-pandemic levels and there are now signs of renewed confidence in cinemagoing and the sectors growing recovery. Odeon in particular are beginning to rethink the cinema experience with a refurbishment programme which will convert a cinema into “Odeon’s Luxe” format which intends to deliver enhanced audio-visuals, luxury seating and a bar area.
- 7.12 Regarding the **Health and Fitness**, many market commercial gyms were forced to close in 2020 and early 2021. Following the lifting of lockdown restrictions there was resurgence in activity and usage. During this time there were dramatic growths in other areas of the industry, such as online training and home equipment, however the industry is already rebounding and these trends are not expected to continue. The pandemic has nevertheless left a legacy with shifts to alternative workout routines, and the role of technology. Overall, gym memberships decreased by 4.7% from 10.4 million in 2019 to 9.9 in 2022 and market value was down by 4.3% to £4.9 billion from £5.1 billion in 2019<sup>35</sup>. In broad terms, the UK industry is building back to pre-pandemic levels – 631 clubs closed,

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<sup>34</sup> IBISWorld Industry Statistics Cinemas in the UK - Market Size 2011–2029 (Updated June 2022)

<sup>35</sup> The Leisure Database Company “State of the Fitness Industry Report UK (2022)”

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but 455 opened – and with 7,063 currently operating this represents a reduction of 176 from 2019.

- 7.13 The industry is expected to recover, benefiting from more health consciousness along with government initiatives targeted at encouraging physical activity. Consumers are taking better care of their own wellbeing and they are expected to maintain and even increase their levels of exercise. Like other sectors, further growth and trends relate to technologically connected equipment, inclusive fitness, and mind-body programs and practices.
- 7.14 In relation to **hospitality**, the pandemic has instigated a shift in society, one which appears to have bolstered the idea of staycations. Choosing to stay closer to home for holidays is now justified also for environmental reasons and budgeting concerns. However, the hospitality industry has also experienced a more indirect and subtle shift in terms of hygiene protocols and the growth in contactless technologies. More than ever, consumers are now acutely aware of sustainability, health and wellbeing.
- 7.15 Furthermore, due to the seismic shift in remote and hybrid working, many hospitality venues are being used as make-shift offices for ‘bleisure’ (business and leisure) travellers. Hotels, for example, can capitalise on this trend and adapt their offer, providing ample plug sockets, free high speed Wi-Fi and good coffee. It is expected that the hospitality industry will become more digitalised, thanks to the more widespread use of technology-assisted options, such as mobile check-in, contactless payments, voice control and biometrics.
- 7.16 Consistent with the 2021 Centres Study Update, whilst there is a prospect of growth based on demand within commercial leisure sectors within the Black Country, conditions are yet to return to more stable long-term levels, and future demand for leisure space will be dependent on market interest.

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## 8. Conclusions

- 8.1 This report provides an update on the quantitative need for new retail (comparison and convenience goods) floorspace in the BCLA area and its centres over the period to 2039. The findings update the results of the '2020 Black Country Centres Study' and the '2021 Black Country Centres Study Update'. It also provides a summary update of key changes to the healthchecks for the 'Tier 1' and 'Tier 2' Centres and the leisure and office market sector.
- 8.2 Although retail will remain a key part of their overall offer, vitality and viability - helping to generate trips, footfall and spend – it is recommended that the strategic policies in Local Plans provide a basis for the policies and strategies to be developed for each centre to help promote greater flexibility and diversity, so that they can respond more effectively and rapidly to future trends. The UK retail sector may be profoundly changed, but the hastening of trends such as the move to town centre living and demand for new retail experiences may ultimately breathe new life into high streets. LSH anticipates that the trends that are likely to emerge include:
- **Survival of the most adaptable retailers** - Retailers that have survived the economic challenges may find that their market positions are strengthened, including as a result of a reduction in competition. Those in the best position to prosper may include strong high street names with a good mix of online and in-store operations. Local independent and artisan retailers may also be able to prosper by tapping into consumer demand for new retail experiences.
  - **Potential for retail to residential conversions** - With new housing delivery high on the UK government's agenda, some landlords and developers may take the opportunity to re-purpose struggling retail properties into residential units, but as detailed in paragraphs 2.37-44 previously, the nature, location and extent of this is likely to be mainly influenced by market conditions.
  - **From goods provision to services provision** - With town centre catchment populations increasing, demand will grow for a wider range of high street amenities to serve local communities such as education, healthcare facilities, dentists, hairdressers and beauticians.
  - **Enhanced retail experiences** – In order to support the diversification of, and attract consumers back to, the high street in the post-pandemic world, this could take the form of providing unique experiences that cannot be replicated online or at home, for example by encouraging the growth of pop-up shops, independent eateries and experiential retailers, as well as more pedestrian and cycle friendly environments, green spaces and meeting places. Local authorities and other stakeholders may need to help facilitate this, such as through environmental improvements to centres.

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- **Growing need for local retail provision** - Smaller walkable local and neighbourhood centres serving local communities may ultimately benefit from the changing geography of retail demand and as hybrid working continues.
  - **Technology** - Centres will have to become 'smart' and make use of technology so that they are aligned with how customers shop and engage with brands. Flexibility and innovation will be essential to ensure the high street remains relevant for consumers. Providing free Wi-Fi and online promotions to attract shoppers, tracking footfall and developing new high street apps and town websites will be essential. It means town centre shops will be able to better understand the needs of their customers that will help them adjust their opening times, offer digital promotions to encourage people in at quieter times. This will help towns understand their strengths, support community activities, help and aid businesses and bring a fresh vibrancy.
- 8.3 In terms of the 'accessibility' element of Draft Black Country Plan Policy CEN2 part 8 for Strategic Centres, in addition to our overview in the Centres Study 2020, we understand car parking considerations are addressed in the Aecom Black Country Parking Study.
- 8.4 The retail capacity assessment update is again underpinned by robust evidence, most up-to-date data inputs and forecasts, including:
- the latest ONS-based population projections for the Study Area and study zones;
  - the most recent base year estimates for convenience and comparison goods expenditure (2020 prices) by zone as derived from Experian;
  - the latest forecast growth rates for retail expenditure, Special Forms of Trading (SFT) and floorspace 'productivity' informed by the latest Retail Planner Briefing Note 19 (January 2022) published by Experian Business Strategies (EBS); and
  - the estimated turnover of all commitments in the BCLA.
- 8.5 Based on the key baseline assumptions that the retail market is in 'equilibrium' at the base year (2022) and that market shares remain constant over the study period (which is appropriate for a study of this nature and scope), the analysis shows that there is no capacity for new retail (convenience and comparison goods) floorspace over the period to 2039 as shown below, this is with the exception of Walsall, for which the evidence points to some potential modest additional capacity post 2029 in both foodstore and local supermarket/deep discounter formats.

**Table 8.1: BCLA Area: Aggregated Convenience Goods Capacity (Net sqm) Forecasts**

LPA	Foodstore Format (sqm net)				Local Supermarket/ Deep Discounter Format (sqm net)			
	2024	2029	2034	2039	2024	2029	2034	2039
<b>Wolverhampton</b>	-2,448	-1,977	-1,498	-969	-4,371	-3,531	-2,675	-1,730
<b>Dudley</b>	-2,308	-1,761	-1,205	-590	-4,122	-3,145	-2,151	-1,053
<b>Sandwell</b>	-2,244	-1,662	-1,070	-415	-4,007	-2,968	-1,910	-741
<b>Walsall</b>	-329	70	477	926	-587	125	851	1,653
<b>TOTAL: BCLA AREA</b>	<b>-7,329</b>	<b>-5,331</b>	<b>-3,296</b>	<b>-1,048</b>	<b>-13,087</b>	<b>-9,519</b>	<b>-5,885</b>	<b>-1,871</b>

**Table 8.2: BCLA Area: Aggregated Comparison Goods Capacity (Net sqm) Forecasts**

LPA	2024	2029	2034	2038
<b>Wolverhampton</b>	-3,661	-3,803	-3,717	-2,414
<b>Dudley</b>	-3,227	-3,461	-3,319	-1,177
<b>Sandwell</b>	-2,076	-2,215	-2,131	-861
<b>Walsall</b>	-213	-302	-248	564
<b>TOTAL: BCLA AREA</b>	<b>-9,178</b>	<b>-9,781</b>	<b>-9,417</b>	<b>-3,888</b>

- 8.6 The NPPF requires that: “...*planning policies and decisions should support the role that town centres play at the heart of communities, by taking a positive approach to their growth, management and adaptation*” (paragraph 86). The NPPF supports the need to maintain and enhance the long term vitality and viability of town centres first, as the most appropriate and sustainable locations for new investment and development.
- 8.7 Overall, and as with the previous assessments, our conclusions remain the same in that the BCLA need to plan for less, not more retail floorspace over the next 5-10 years and beyond, with an emphasis on repurposing and diversifying the high street. As there is even less capacity than identified in 2020, this re-emphasises our advice in the 2020 Centres Study, particularly that there is not sufficient capacity to justify including floorspace targets in the strategic policies of Local Plans, and given this, the importance of having a locally set threshold for the undertaking of NPPF impact tests.



