Lambert Smith Hampton

BLACK COUNTRY CENTRES STUDY - 2021 UPDATE

for:

The Black Country Authorities

Comprising:

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

Volume 2: Healthchecks

August 2021

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Volume 2: Healthchecks

Appendix 1: Wolverhampton City Centre

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Wolverhampton City Centre Health Check Appraisal

The health check covers the following aspects:

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

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

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

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

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

Figure 1: The Wolverhampton BiD Area

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

Most recently, the city has received funding under the government's Future High Streets Fund (FHSF). The successful bid includes focusing on creating a 'Box Park' food, beverage and events area in Bell Street anchoring the new public realm in the Victoria Street area of the city centre. The FHSF project are also includes public realm improvements around the Civic Halls. Support through the FHSF seeks to build on the strong delivery that is already underway in the city centre, and will enhance and connect an area of the city centre that has, over recent years faced a number of challenges.

Sub-Regional Shopping Hierarchy

Table 1: Sub-Regional Shopping Hierarchy

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

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

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

Table 2: Sub-Regional Hierarchy: Historical Review

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

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

Photographs of Wolverhampton City Centre

Source: © Lambert Smith Hampton

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Diversity of Main Town Centre Uses

Table 3: Number of Units in Wolverhampton (July 2020)

Category	No.	%	UK %*
Convenience	56	7.8%	9.1
Comparison	186	26.1%	27.6
Retail Service	87	12.2%	15.6
Leisure Service	149	20.9%	24.5
Financial and Business Service	72	10.1%	9.3
Vacant	164	23.0%	9
Total			**100%**

Source: Goad survey 7/07/2020
*UK average from the All UK Centres Base % in above Goad survey

Table 4: Composition of Floorspace in Wolverhampton (July2020)

Category	Sq.m	%	UK %*
Convenience	4,998	3.0%	15.4
Comparison	61,650	37.2%	31.9
Retail Service	8,278	5.0%	7.2
Leisure Service	33,176	20.0%	25.7
Financial and Business Service	15,097	9.1%	7.0
Vacant	42,717	25.7%	12.2
Total	**165,915**	**100.0%**	**100%**

Source: Goad survey 7/07/2020
*UK average from the All UK Centres Base % in above Goad survey

Table 5: Number of Units in Wolverhampton (2019)

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

Source: Experian Goad Category Report, September 2019

Table 6: Composition of Floorspace in Wolverhampton (2019)

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

Source: Experian Goad Category Report, September 2019

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Convenience Goods Units

Wolverhampton has a number of convenience retailers including Sainsbury's, Sainsbury's Local, Co-op, and Iceland. There are 57 convenience recorded in the 2020 Goad survey, a loss of one unit since 2019. This represents 7.8% of the total number of units, slightly below the national average of 9.1%. In terms of floorpsace however it is much lower as a proportion – just 3% compared to a national average of 15%. This is reflective of the fact that there is only one supermarket (Sainsbury's) and the sector is dominated by small units. The Experian data has categorised all of the permanent stalls at Wolverhampton Market as individual units, which significantly skews the floorpsace data.

Comparison Goods Units

The 2020 Goad survey reports 186 comparison stores, representing a loss of 3 units since 2019. This accounts for 26.1% of the number of units; only slightly below the national average (27.6%). In terms of floorspace it is significantly above the national average: 27.2% compared to 31.9%. There are some large stores present, as indicated in the summary below. This high proportion above the national average has been maintained since 2019 despite the closure of several department stores and large units. Since the 202 survey was undertaken the historic Beatties (a local department store that was part of the House of Fraser group) has also announced its closure. This landmark building was granted planning permission in March 2021 for conversion to 306 apartments, with retail units on the ground floor.

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

- The highest number of comparison outlets is in the telephone & accessories sub-category (14 units – 2.0% vs 1.3% nationally); followed by ladies & menswear & accessories (15 units 2.1% vs 1.5% nationally) and jewellery, watches & silver shops (11 units – 1.5% vs 1.4% nationally).
- There are 10 charity shop units, though the composite proportion of 1.4% is lower than the national average 2.6%.
- There is a still an over provision in the categories of: department & variety stores despite the loss of two units (now 4 units – 0.6% vs 0.4% nationally); greeting cards (8 units – 1.1% vs 0.6% nationally); toys, games & hobbies (9 units – 1.3% vs 0.7% nationally); other comparison goods (10 units 0.9% vs 0.9% nationally).
- Key fashion multiple retailers include Next, River Island, H&M, New Look, Deichmann and Sportsdrect.com. Department and variety brands include Primark, Marks & Spencer. Non fashion multiples include Poundland, Boots, The Entertainer, Pandora, Superdrug and Wilkinson amongst others. most of which are located in either the Mander Centre or Wulfrun Centre.
- There is no representation across a range of comparison goods categories including: catalogue showrooms, fitted furniture, gardens & equipment, office supplies, photographic & optical and vehicle accessories.
- The independent retailer provision is interspersed across the centre and is characterised by small to medium sized stores selling a variety of goods including gifts/crafts/toys retailers, jewellers, clothing outlets, florists and furniture.
- Significant under representation is seen in the categories of 'chemist & drugstores'; 'clothing general'; 'crafts, gifts, china & glass'; 'ladies wear &

accessories'; and 'hardware & household goods'.

In summary, we consider a good provision of comparison goods provision with representation by major multiples and supported by independent retailers. The above average representations described above are to be expected for a centre of the size and status as Wolverhampton. The large proportionate quantum of comparison goods provision underpins the role of the centre as a key location for this shopping category.

Service Provision

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

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

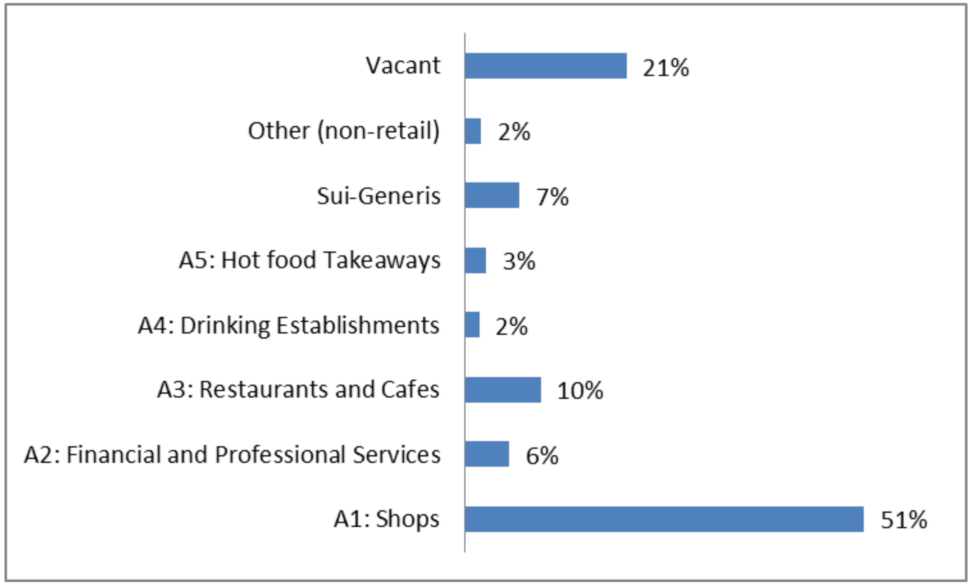
- There are 87 **retail services**, which account for 12.2% of total outlets. This is below the national average of 15.6% and represents the loss of 7 units since 2019. This category is mostly made up of health and beauty outlets (63 units, 5 less than in 2019) and opticians (10 units). Closures in this sector can often be explained by the impact of Coivid19 restrictions.
- With reference to **financial & business services**, there are 72 outlets (4 less than in 2019), which represent 10.1% of total units which is marginally higher than the national average of 9.3%. This category comprises mainly of 19 property services units, 15 retail bank units, 13 legal services units, 7 employment & careers and 7 financial services outlets. Although there have been closures in most of these sectors the centre has maintained all of its retail banks, which is positive.
- There are 149 **leisure services** outlets in the 2020 survey, representing a loss of 8 units since 2019, which is not surprising given the forced closures through most of the year due to Covid-19. Current provision represents 20.9of total provision which is lower than the national average 24.5%. In terms of floorspace this stands at 20.0% which is lower than the national average of 25.7%. Leisure provision is dominated by 40 fast food and take-away outlets, followed by 29 cafes, 21 restaurants, 21 public houses, 11 bars & wine bars and 11 casino & betting offices. A large proportion of these are independent led and spread across the centre. Commercial leisure is seen in the form of Starbucks (Wolverhampton University), Costa, McDonald's Burger King, Yates, Ladbrokes and Coral.
- In summary, the overall level of service provision is comparatively lower than the national average with the leisure service dominating predominantly in the food and beverage category (take-aways, cafes, restaurants, public houses, bars & wine bars). Reductions within this sector can in large part be explained by Covid-19 and associated trading restrictions, and follow the national picture. The analysis shows that Wolverhampton has a smaller service sector (and especially leisure service sector) than one would expect for a centre of its size.

Proportion of Vacant Street Level Property

The 2020 Goad data shows 164 vacant outlets, 3 more than in 2018. This represents a vacancy level of 23.0%, which is considerably higher than the national average of 9.0. In terms of floorspace this is 25.7% of the total and considerably higher than the national average of 12.2%. With nearly one in four units vacant this is significant. The situation has been getting worse since 2018, in a period when the national situation has been improving (in terms of unit numbers if not floorpsace.

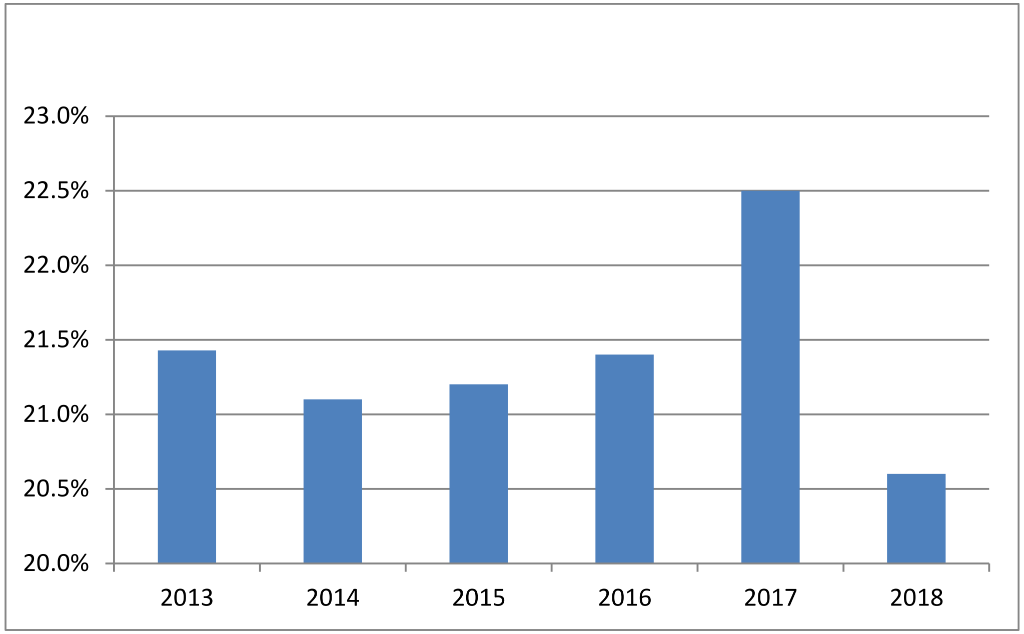
Analysis of the Council's own monitoring information (based on classifying units by Use Class and aligned to the area defined within the Wolverhampton city centre's Area Action Plan (AAP) analyses the 2018 data by use class (NB. note that these are the pre-September 2020 use classes).

Figure 2: Analysis of Wolverhampton City Centre's AAP Frontages



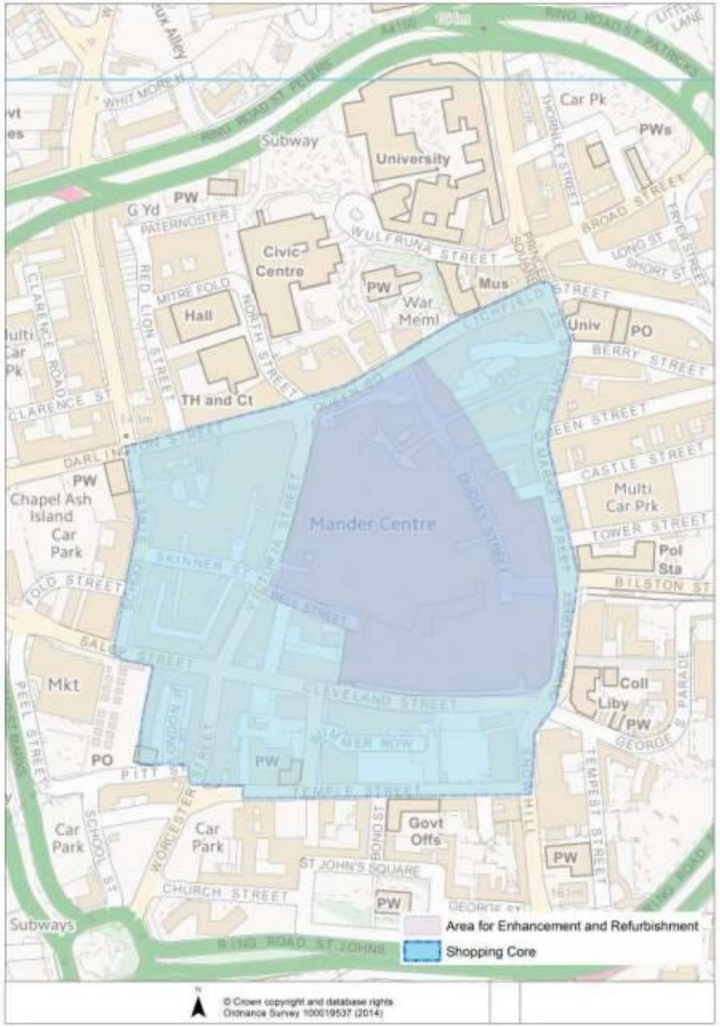
Furthermore, and over a seven year period between 2013 and 2020, the Council's data shows that vacancy rates have stayed above 20% with the current situation exceeding the previous peak of 22.5% (in 2017).

Figure 3: Wolverhampton: Vacancy Rate (2013 – 2018)



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

Figure 4: **Wolverhampton: Shopping Core Character Area Boundary**



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

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Potential for Transition to Residential

Recent changes to planning legislation introduced by Government (22 July 2020) allow for easier transition from town centres uses to residential use. Class MA introduces a new permitted development right to allow for the change of use from Commercial, Business and Service use (Class E) to residential use (Class C3). Under the Town and Country Planning (General Permitted Development) (England) (Amendment) (No.3) Order 2020 (S.I. 2020.No. 756) owners of vacant and redundant buildings of a footprint of up to 1,000 square metres are able to fast-track the planning process for demolishing and rebuilding them as new residential developments within the footprint of the original building, up to a maximum height of 18 metres, including up to 2 storeys higher than the former building.

As a simple 'rule of thumb' indication we have used the current (as provided in this report) extent of vacant floorspace as a basis to estimate how many apartments could potentially be delivered as a maximum. However, there are several limitations in this approach that should be noted. It is considered unlikely that many individual shop units within a high street would be converted to residential on an ad-hoc basis, nor would this approach be generally desirable from a design perspective. Market values are likely to determine to a large degree the distribution of residential conversions/re-developments. A more co-ordinated approach would also lead to a more coherent distribution of town centre and residential uses, which would preserve the critical mass of a town centre core, preserving the continuity of key high street frontages, whilst enabling better sustainable residential environments to come forward. The simple approach outlined here does also not account for more complex transitions, such as the large scale, positive, potential for delivering vertical mixing of uses – with apartments above retail and other active ground floor uses; nor for more comprehensive redevelopment to deliver consolidated areas of new residential development at town centre fringes with larger and higher density apartment blocks, which could deliver a greater density of development. These could be on the site for larger vacant floorspace units (e.g. former large flootprint stores) or other larger 'windfall' sites. Similarly, the current approach does not consider the potential for conversion of office uses to apartments, which could represent a significant additional component of residential transition. For all of these reasons it is recommended that a more considered Urban Capacity Study approach is followed for each centre to reflect a more accurate and desirable approach to residential transition.

Nevertheless, the vacant floorpsace approach has some value in providing broad headline figures for comparative purposes. The calculation is based on the following formula:

- Vacant floorspace total (taken from Table 4 above)
- We have then assumed that 25% of this floorpsace may come forward for residential. This same percentage was used in the recent Cannock Chase District Housing Development Capacity Study [CCDC, March 2021]
- We have assumed that the new residential development will be 3 storey. Most retail buildings in the town centre are 2-3 storey, with the floorspaces in Table 3 (and in Goad surveys) only representing ground shopfloor area. The Permitted Development Rights also allow an increase of up to 3 storeys to the existing building. Three storeys is therefore considered to be a reasonable modest assumption.
- We have subtracted 15% for communal circulation space - this is considered to be a reasonable assumption for an efficient layout.
- We have applied an average apartment size of 65 sq.m. This is based on the English Household Survey (2018) which states that the average mean usable floor area of a converted flat was 65sqm. It also compares consistently to the Nationally Described Space Standards [DCHLG, 2015] which indicates a range between for 51-72 sq.m for 1 and 2 bed apartments.

On this basis it may be estimated that c.**420** apartments could come forward from the 42,717 (gross) sq.m vacant retail floorpsace in Wolverhampton town centre.

Customers' Experience and Behaviour

The household telephone interview survey (HTIS) undertaken in 2019 asked specific questions on respondents' views and perceptions of their local city or town centre. For those whose centre was Wolverhampton City Centre, the overwhelming majority of the respondents visited either one day a week (12.1%); Every two weeks (11.4%); Monthly (17%). Additionally some 4.7% frequented every 2-3 days; 1% frequented every 4-6 days a week and 2.1% daily. Only 17% of those who responded never visited the centre. Additionally of this sample 52% used the centre for household shopping and town centre uses.

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

Table 7: Wolverhampton City Centre: Top 'Likes'

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

Source: HTIS 2019

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

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

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Table 8: Wolverhampton City Centre: Key Improvements

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

Source: HTIS 2019

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

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

Table 9: Wolverhampton City Centre: Top Reasons for Not Visiting

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

Source: HTIS 2019

Retailer Representation

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

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

Table 10: **Category Composition**

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

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

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

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Table 11: Experian Goad list of Major Comparison Retailers

Retailer	July 2019	July 2020
Argos		No*
Boots the Chemist		Yes
Burton		No
Carphone Warehouse		Yes**
Clarks		Yes
Clintons		Yes
Debenhams		No
Dorothy Perkins		No
EE		Yes
H&M		Yes
HMV		Yes
House of Fraser		Yes***
John Lewis		No
Marks & Spencer		Yes
Monsoon		No
New Look		Yes
Next		Yes
O2		Yes
Primark		Yes
River Island		Yes
Sainsbury's		Yes
Superdrug		Yes
Tesco Extra		No
TK Maxx		No
Topman		No
Topshop		No
Vodafone		Yes
Waitrose		No
Waterstones		Yes
WHSmith		No
Wilkinson's		Yes

Source: Goad plan from July 2020

Wolverhampton has 19 of the 31 largest national comparison retailers present. This is considered relatively strong presence for a centre of this size.

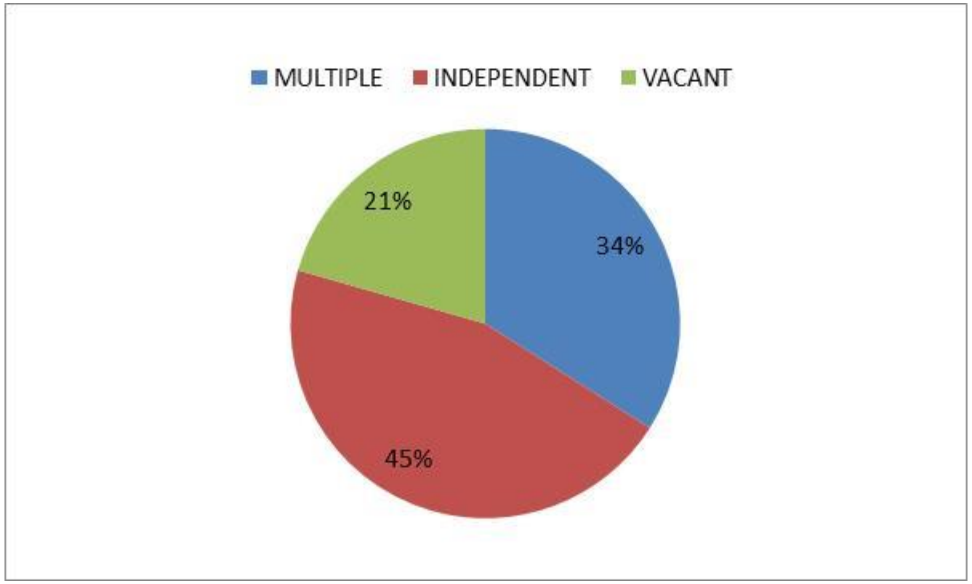
There have been a few closures since the 2019 survey, though these are generally associated with national closures and consolidations in what has been a difficult trading period (e.g. Argos, Debenhams, Carphone Warehouse). Wolverhampton has done well to retain major national stores that have closed in other centres (e.g. HMV, House of Frasers (see ** below)).

* 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' fascia when this opened in the former Debenhams unit.

Figure 5: Wolverhampton: Shopping Core Character Area Multiples vs Independents



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

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Table 12: Wolverhampton City Centre: Operators Seeking Representation

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

Source: The Requirements List

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Accessibility and Pedestrian Footfall

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

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

Wolverhampton benefits from excellent road links both locally and nationally.

Significant road improvements are planned, which will also provide development opportunities and uplift the local economy. Consultation was undertaken in 2020 on options to ease congestion, build new homes and create business space along the A454 road between Wolverhampton and Walsall. This could include building up to 8,000 new homes and creating 12,000 new jobs.

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

Figure 6: **Wolverhampton: Tram**

Source: © Lambert Smith Hampton

Car Parking:

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

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

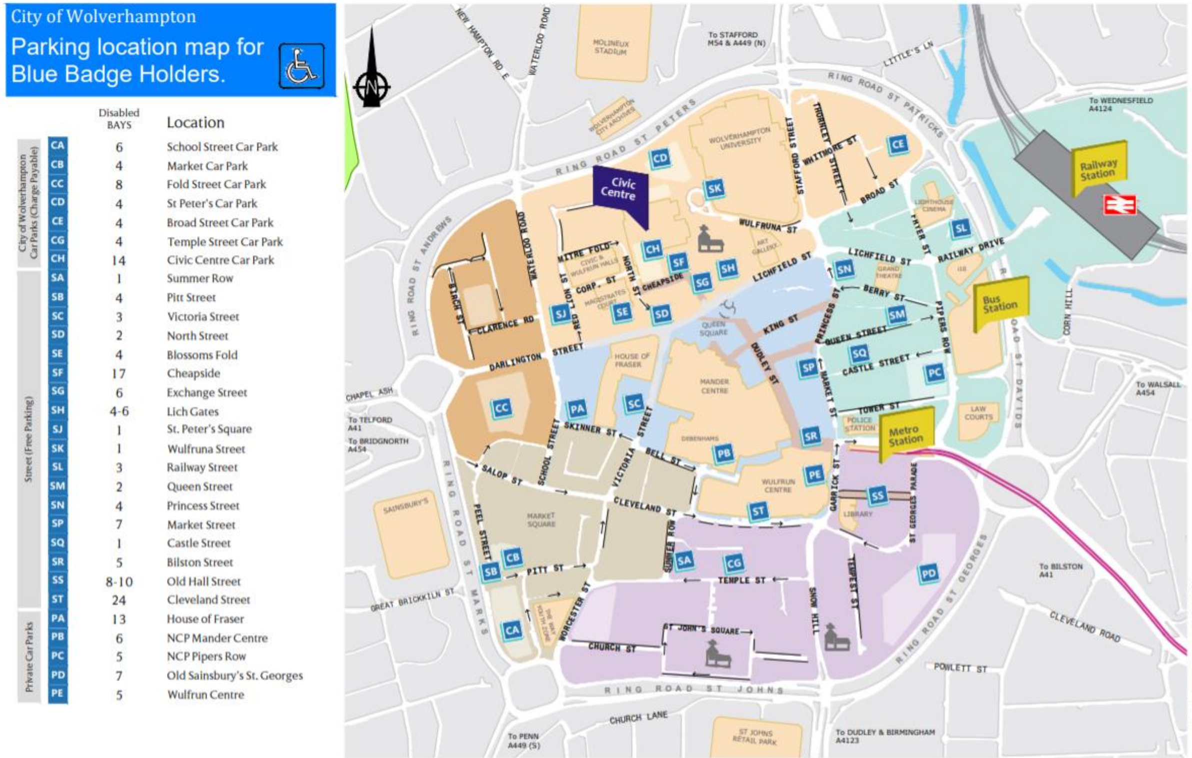
We understand that additional car parking spaces have been introduced at car parks in Bell Street, Temple Street and Tempest Street. These further add to the existing 400 on-street spaces which are free after 6pm. The aim of these is to encourage more drivers to come into the city centre, bringing a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

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

The car parks across Wolverhampton city centre come with their own parking restrictions. There is also on-street parking available in certain areas. Pay and display machines are used for on-street parking bays. Some areas require a Wolverhampton parking permit. On-street parking is divided into two zones. Parking restrictions are in place in both zones from 8.30am to 6pm, 7 days a week. In Zone 1, the parking charges are 60p per 20-minute period with a maximum stay of 2 hours. In Zone 2, the parking charges are 60p per 40-minute period with a maximum stay of 2 hours.

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

Figure 7: Wolverhampton: Blue Badge Parking Provision



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

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

Public Transport:

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

Table 13: Bus Stops and Services in Wolverhampton City Centre

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

Lambert Smith Hampton

Bus Service Routes Wolverhampton

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

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

Figure 8: **Wolverhampton City Centre: Wayfinding**

Source: © Lambert Smith Hampton

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

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

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

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

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

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

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

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

Perception of Safety and Occurrence of Crime

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

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

Figure 10: Crime Statistics 2016 – 2019

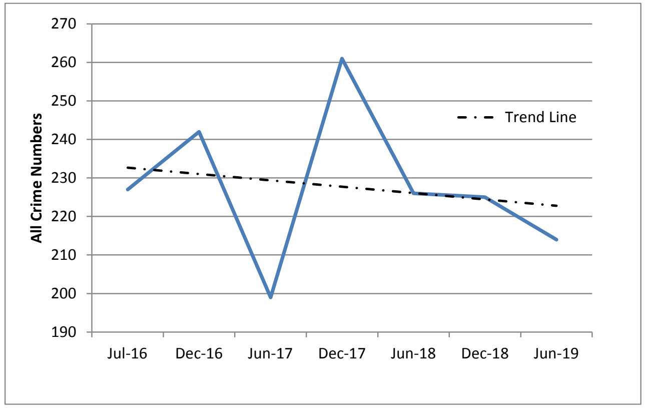


Figure 11: Crime: Area of Coverage

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

Commercial Rents (Promis)

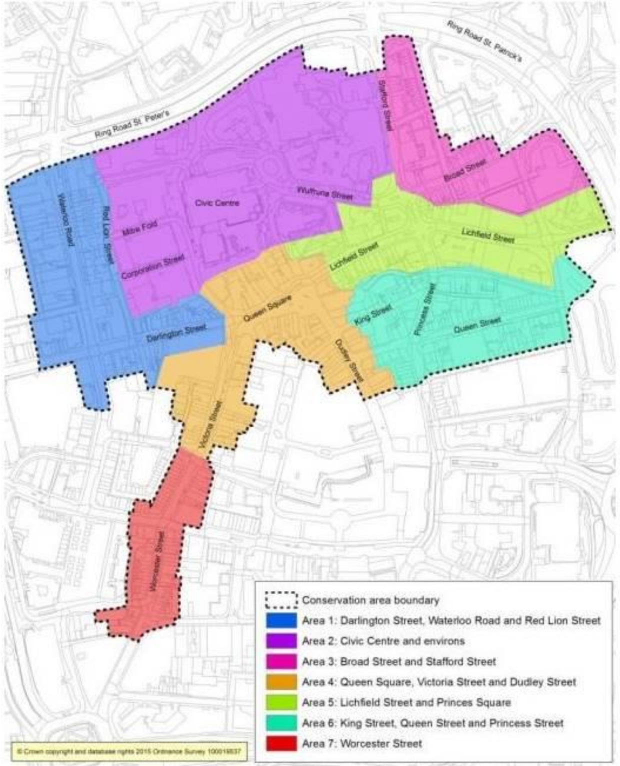
The Promis report (2020) indicates that at the end of 2020 Prime Zone A rents in Wolverhampton achieved £58/sq.ft (compared to £74 nationally). The prime pitch is centred on Dudley Street where the higher levels are likely to be achieved.

The centre was achieving prime town centre yields of 8.25% in 2020, compared to 7.66% nationally, demonstrating less confidence in the local retail market than that found nationally.

Environmental Quality

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

Figure 12: Wolverhampton City Centre: Conservation Area Boundary



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

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

Figure 13: **Wolverhampton City Centre: Public Realm**

Source: © Lambert Smith Hampton

Figure 14: An artist's impression of the planned Victoria Square {FHSF]

Source: Wolverhampton Council

In July 2020 Wolverhampton Council, the University of Wolverhampton and Creative Black Country were accepted onto Actors of Urban Change, a Europe-wide programme which promotes sustainable urban development and will give young people a voice in city development. The first Youth Lab Wolverhampton event, an online drawing workshop has been undertaken. Improvements identified included more colour and greenery, more independent businesses, multi-purpose public spaces, additional places to relax in, walking trails incorporating landmarks, statues and other works of art, the creation of legal graffiti walls and a celebration of Wolverhampton's existing architecture. The results were based on a survey of young people, which will help to shape the vision for Wolverhampton's bid to the Government's Town Fund of up to £25 million.

Wolverhampton's Town Deal Board submitted a final bid for up to £48 million of Government funding to transform the city centre, Bilston and Wednesfield in July 2020. In March 2021, it was announced that Wolverhampton city centre would receive £25m. The centre will also receive £15.76m from the Future High Street Fund. The funding will be used to pedestrianise part of the city centre and is hoped will help the city bounce back from the impact of Covid-19. Work will focus on 38 acres covering Victoria Street, Bell Street, Cleveland Street, Fold Street and the public areas around the Civic Halls (see image above).

Evidence to Barriers to New Businesses and Existing Businesses Expanding

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

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

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

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

Extent of the Evening Economy

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

As previously detailed, the Goad data indicates that there are 149 leisure services outlets dominated by 41 fast food and take away outlets, followed by 26 cafes, 18 restaurants, 19 public houses, 12 bars & wine bars and 8 casino & betting offices. A large proportion of these are independent led and spread across the centre. These facilities provide a broad reference for the evening economy.

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

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

Digital Infrastructure

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

Wolverhampton's Digital Infrastructure Strategy (2020) outlines the approach to supporting the rollout of full fibre broadband and 5G technologies. The City secured Local Full Fibre Network funding to connect public sector premises to full fibre broadband and commercial rollout is underway supported by barrier busting including a 'dig once' approach whereby ducting is laid during highways works and regeneration and through working with developers at build stage through planning. Three Mobile Network Operators are rolling out 5G in Wolverhampton, all of which have already gone live covering areas of the city initially through upgrading existing telecoms equipment including rooftops and masts but going forward through the use of small cell on street furniture. The Council is upgrading to smart street lights could open up opportunities to explore public WiFi in future as well as support the rollout of small cell technology to support the rollout of 5G.

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

Conclusions

Background to the Wolverhampton City Centre health check appraisal

Wolverhampton is a major city forming a major part of the Black Country and Greater Birmingham region. The city is undergoing a significant change with new investment in a range of sectors that aims to benefit the city centre directly in terms of additional footfall, mixed-use and leisure provision and improvements to the public realm. The city is also a recipient under the government's Future High Streets Fund (c.£15m) and Towns Fund (c.25m) and has an active 'Youth Lab' helping to influence the future form of the centre. It therefore represents a city that is earmarked for future growth and change.

Sub-regional shopping hierarchy

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

Diversity of main town centre uses

The diversity of uses analysis indicates below average representation across all categories of goods and services except for financial services where the provision is marginally higher (10.1% vs 9.3%).

Retailer Representation

The retailer representation across the centre is dominated by the independent sector and it is important to maintain the current level of multiple retailers to retain the attraction and vitality of the centre. The typical size and type of unit also lends towards the independent sector.

Proportion of vacant street level property

Both the Goad data and the Council's own monitoring data indicate a 23% vacancy rate which is very high in the context of the current provision in the centre and the UK average.

Customer's views and behaviour

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

Pedestrian flows
Good pedestrian footfall was observed during the daytime.

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

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

Commercial rents on non-domestic property
Prime Zone A rents in Wolverhampton currently average £58/sq.ft (compared to £74/sq.ft nationally).

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

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

Strengths of Wolverhampton City Centre
- Good mix of national multiples and independent retailers.
- Strong independent led retailer representation.
- There is latent interest from a wide range of operators seeking representation in the centre.
- The city centre is highly accessible with a good level of connectivity which is set to be enhanced further with the Interchange transport hub regeneration programme.

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

Weaknesses of Wolverhampton City Centre

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

Opportunities within Wolverhampton City Centre

- There are several major investment and regeneration opportunities underway within the city centre (Towns Fund, Future High Street Fund).
- Opportunity to increase cycle ridership.
- Prospect to provide high density uses which would aid in increasing footfall and patronage of the centre’s facilities.
- There is the potential to attract more visitors in the afternoon and evening.
- Opportunity to increase more family oriented evening economy.
- Continue to improve on the perception of safety across the centre.

Threats to Wolverhampton City Centre

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

Appendix 2: Brierley Hill

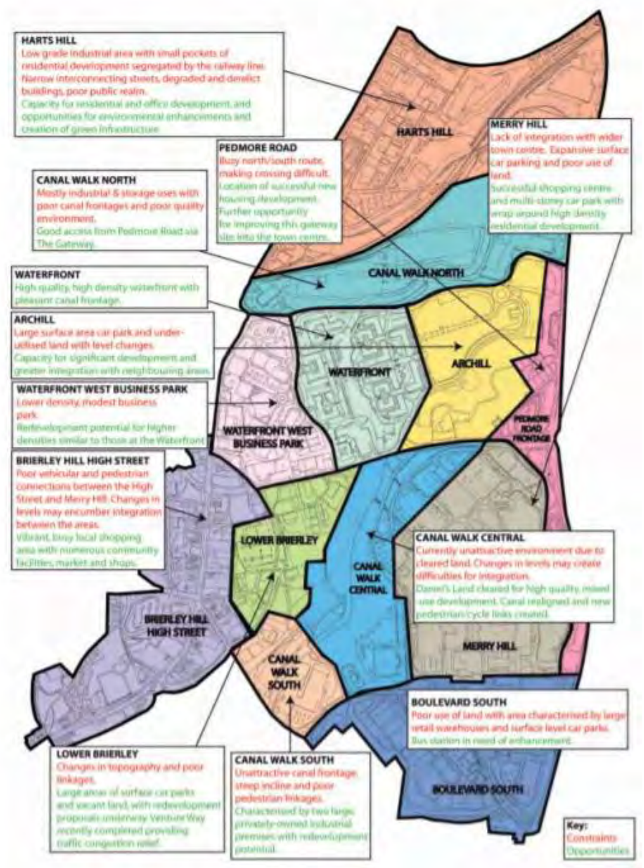
Brierley Hill High Street Health Check Appraisal

The revised health check covers the following aspects:

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

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

Figure 1: Brierley Hill Strategic Centre: AAP



Source: Brierley Hill Area Action Plan, Page 2

Figure 2: Brierley Hill Strategic: Core Strategy

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

Most recently, Brierley High Street has been successfully awarded £10m funding under the government's Future High Streets Fund (FHSF). The bid focuses on proposals to breathe new life to Brierley Hill High Street; to encourage the introduction of more housing to the High Street; an improvement programme for older heritage buildings; improve transport infrastructure and bring in new investment to the town.

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Sub-Regional Shopping Hierarchy

Table 1: Sub-Regional Shopping Hierarchy

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

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

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

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

Table 2: Sub-Regional Hierarchy: Historical Review

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

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

Photographs of Brierley Hill Centre


Memories
TAN-TRUMS


CIDER
TO LET
ALL
ENQUIRIES

Diversity of Main Town Centre Uses

Table 3: Number of Units in Brierley Hill High Street (May 2020)

Category	No.	%	UK %*
Convenience	21	11.7%	9.1
Comparison	44	24.6%	27.6
Retail Service	27	15.1%	15.6
Leisure Service	37	20.7%	24.5
Financial and Business Service	8	4.5%	9.3
Vacant	42	23.5%	9
Total			**100%**

Source: Goad survey 23/05/2020
*UK average from the All UK Centres Base % in above Goad survey

Table 4: Composition of Floorspace in Brierley Hill High Street (May 2020)

Category	Sq.m	%	UK %*
Convenience	9,634	22.5%	15.4
Comparison	10,944	25.6%	31.9
Retail Service	2,341	5.5%	7.2
Leisure Service	12,867	30.1%	25.7
Financial and Business Service	576	1.3%	7.0
Vacant	6,373	14.9%	12.2
Total	**42,735**	**100.0%**	**100%**

Source: Goad survey 23/05/2020
*UK average from the All UK Centres Base % in above Goad survey

Table 5: Number of Units in Brierley Hill High Street (April 2018)

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

Source: Experian Goad Category Report, April 2018

Table6: Composition of Floorspace in Brierley Hill High Street (April 2018)

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

Source: Experian Goad Category Report, April 2018

NB. It should be noted that non-essential shops were closed in the Black Country from 26 March 2020 to 15 June 2020, as part of the Covid-19 lockdown restrictions, and so were closed at the time of the Goad survey (23 May 2020). However, the survey results appear to suggest that retail units were included, even if temporarily closed.

Convenience Good Units

There are 21 convenience units, according to the 2020 Goad survey, representing around 12% of the total number of units (higher than the 9% UK average). There has been a loss of 2 units since 2018 and a relatively small level of associated convenience good floorspace. In terms of floorspace this equates to 22.5%, which is well above the national average of 15.4%. Brierley Hill High Street has a number of key convenience retailers including an Asda Superstore, Iceland and Farmfoods. According to GOAD there are 7 convenience stores, 2 grocers. 1 Convenience Tobacco Newsagent (CTN) outlets, two frozen food outlets, 1 baker, 1 market, 2 butchers, 1 heath food outlets, 1 supermarket and 3 off license outlets

Comparison Good Units

According to the 2020 Goad Category Report, there are 44 comparison goods retailers located within Brierley Hill High Street trading from a total floorspace of 10,944 sqm. The number of outlets represents 24.6% of total units in the centre, which is below the national average of 27.6%. The current floorspace provision represents 22.5% of total floorspace in the centre, which is significantly below the national average of 31.9%. The number of comparison goods stores has not changed since 2018, which can only be considered positively, given that the national average proportion of these units within centres declined 2 percentage points over the same period.

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

- There is an over provision of charity shops (8). This is equivalent to 4.4% of total outlets compared with national average of 1.9%, which suggests a possible vulnerability.
- Overprovision by outlets is also seen across the categories of ‘electrical and other durable goods’ ‘florists’ (2 units - 1.1% vs 0.6 % nationally); ‘footwear’ (2 units - 1.1% vs 0.6% nationally); ‘furniture general’ (5 units – 2.8% vs 0.7% nationally); ‘hardware and household goods’ shops (5 units - 2.8% vs 1.3% nationally); ‘textile & soft furnishing’ (2 units - 1.1% vs 0.6% nationally).
- There are none of the 31 largest national multiples present in the centre, though there are other multiple brands, including Poundland Savers, Home Bargains and Card Factory. The independent offer is characterised by small independent stores selling a variety of goods including a florist, wedding dresses, footwear and carpets. This situation is largely unchanged since 2018.
- There is no representation across a range of comparison goods categories including: childrenswear & infants wear, menswear & accessories, gardening and equipment stores, leather and travel goods, office supplies or vehicle accessories.
- Under representation is seen in the categories of ‘crafts, gifts, china and glass’); ‘jewellery, watches & silver’ ladies & menswear accessories ‘toiletries, cosmetics & beauty products’ ‘toys, games & hobbies’.

In summary, we consider the proportionately lower quantum of comparison goods floorspace is reflective of the larger choice and provision at the nearby Merry Hill

Shopping Centre. The current provision serves to satisfy the High Street's immediate local catchment.

Service Provision

Service businesses are defined by Experian Goad as including retail, professional and financial services and leisure services. As Table(s) 4 and 4 and show that in combination these categories comprise 72 service outlets. These represent 40.3% of all units, which is below the national average of 49.4%. However, the associated floorspace provision of 39.9% is higher than the national average (36.9%).

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

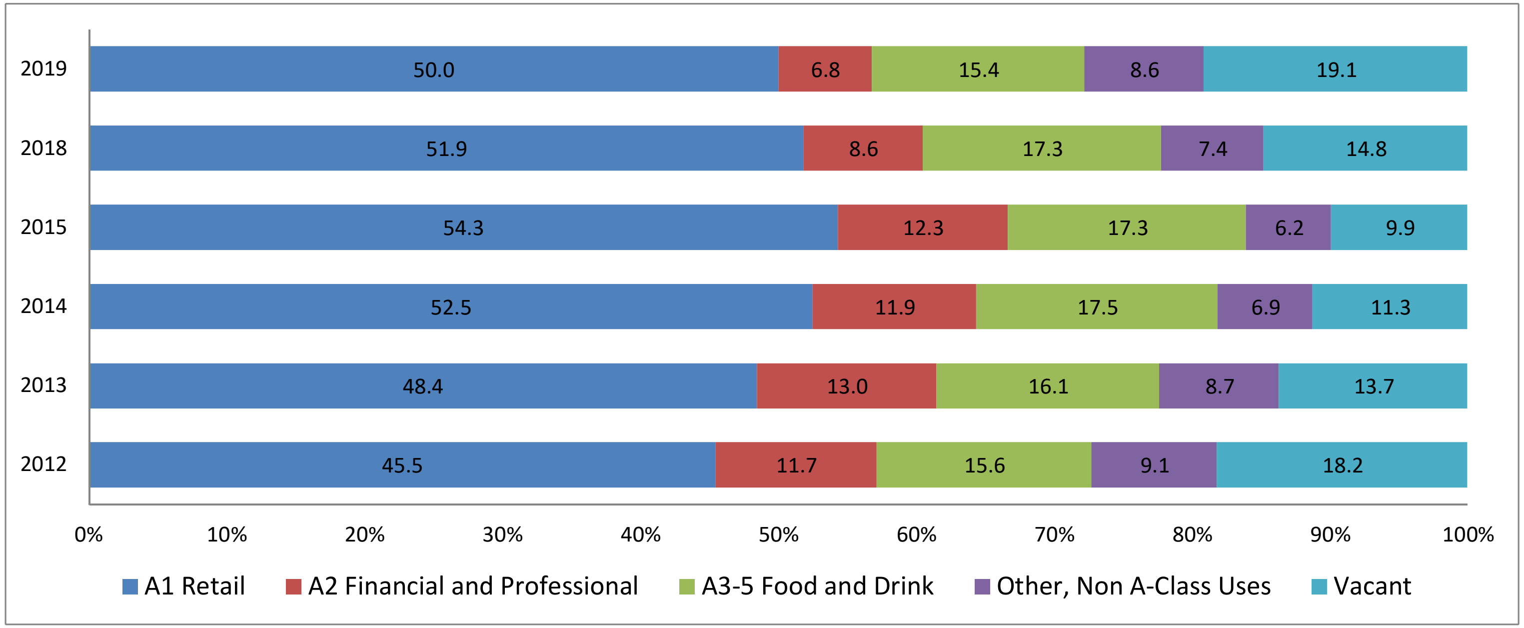
- There are 27 **retail services**, which account for 15.1% of total outlets. This is below the national average of 15.6%. This category is heavily dominated by health and beauty outlets (22 units). This sector has increased with 4 additional outlets opening since 2018;
- With reference to **financial and business services**, there are 8 outlets, which represent 4.5% of total units which is well below the national average of 9.3%. Three units in this sector have closed since 2018, which is significant and reflects wider consolidation of financial services nationally since 2018. This category comprises 4 property services units and a mix of other uses;
- There are 37 **leisure services** outlets, which represent 20.7% of total provision and is marginally lower than the national average 24.5%. There has been a loss of 6 leisure units since 2018, which is perhaps not surprising given the Covid-19 pandemic, In terms of floorspace this stands at 30.1% which remains significantly higher than the national average of 25.7%. Leisure provision is dominated by 14 fast food and take away outlets, followed by 4 restaurants, 5 cafes, 3 public houses, 3 bingo and amusement outlets, 4 sports & leisure facilities, 1 casinos & betting offices, 2 clubs, 0 disco/dance/nightclubs. The losses have been in restaurants (2 closed), public houses (1), casinos (1), nightclubs (2). There are no bars & wine bars, cinemas or theatres or hotels/guest houses. The provision of these outlets is independent led and spread across the centre. Commercial leisure is seen in the form of the Mecca Bingo outlet and Coral betting at opposite ends of the High Street and this sector has withstood closures
- In summary, we consider there low service provision for retail and financial services but a strong leisure service provision. The latter is dominated by fast food and take-away provision.

Proportion of Vacant Street Level Property

The 2020 Goad data indicates that Brierley Hill has 42 vacant outlets. This, unfortunately, represents an increase of 6 units since 2018. This equates to a vacancy level of 23.5%, which is considerably higher than the national average of 9%. With around 1 in 4 units vacant, this is a considerable issue for the centre, and impacts on its appearance and impression and shows significant vulnerability. The vacant floorspace comprises 14.9% of the total floorspace which is again higher than the national average of 12.2%.

Analysis of the Council's own monitoring information (aligned to the Council's defined area of Brierley Hill High Street and based on classifying units by Use Class) shows that the rise in vacancy levels is a continuing trend, since 2015.

Figure 3: **Analysis of Dudley MBC Healthcheck Data for Brierley Hill High Street**



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

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Potential for Transition to Residential

Recent changes to planning legislation introduced by Government (22 July 2020) allow for easier transition from town centres uses to residential use. Class MA introduces a new permitted development right to allow for the change of use from Commercial, Business and Service use (Class E) to residential use (Class C3). Under the Town and Country Planning (General Permitted Development) (England) (Amendment) (No.3) Order 2020 (S.I. 2020.No. 756) owners of vacant and redundant buildings of a footprint of up to 1,000 square metres are able to fast-track the planning process for demolishing and rebuilding them as new residential developments within the footprint of the original building, up to a maximum height of 18 metres, including up to 2 storeys higher than the former building.

As a simple 'rule of thumb' indication we have used the current (as provided in this report) extent of vacant floorspace as a basis to estimate how many apartments could potentially be delivered as a maximum. However, there are several limitations in this approach that should be noted. It is considered unlikely that many individual shop units within a high street would be converted to residential on an ad-hoc basis, nor would this approach be generally desirable from a design perspective. Market values are likely to determine to a large degree the distribution of residential conversions/re-developments. A more co-ordinated approach would also lead to a more coherent distribution of town centre and residential uses, which would preserve the critical mass of a town centre core, preserving the continuity of key high street frontages, whilst enabling better sustainable residential environments to come forward. The simple approach outlined here does also not account for more complex transitions, such as the large scale, positive, potential for delivering vertical mixing of uses – with apartments above retail and other active ground floor uses; nor for more comprehensive redevelopment to deliver consolidated areas of new residential development at town centre fringes with larger and higher density apartment blocks, which could deliver a greater density of development. These could be on the site for larger vacant floorspace units (e.g. former large flootprint stores) or other larger 'windfall' sites. Similarly, the current approach does not consider the potential for conversion of office uses to apartments, which could represent a significant additional component of residential transition. For all of these reasons it is recommended that a more considered Urban Capacity Study approach is followed for each centre to reflect a more accurate and desirable approach to residential transition.

Nevertheless, the vacant floorpsace approach has some value in providing broad headline figures for comparative purposes. The calculation is based on the following formula:

- Vacant floorspace total (taken from Table 4 above)
- We have then assumed that 25% of this floorpsace may come forward for residential. This same percentage was used in the recent Cannock Chase District Housing Development Capacity Study [CCDC, March 2021]
- We have assumed that the new residential development will be 3 storey. Most retail buildings in the town centre are 2-3 storey, with the floorspaces in Table 3 (and in Goad surveys) only representing ground shopfloor area. The Permitted Development Rights also allow an increase of up to 3 storeys to the existing building. Three storeys is therefore considered to be a reasonable modest assumption.
- We have subtracted 15% for communal circulation space - this is considered to be a reasonable assumption for an efficient layout.
- We have applied an average apartment size of 65 sq.m. This is based on the English Household Survey (2018) which states that the average mean usable floor area of a converted flat was 65sqm. It also compares consistently to the Nationally Described Space Standards [DCHLG, 2015] which indicates a range between for 51-72 sq.m for 1 and 2 bed apartments.

On this basis it may be estimated that c.**60** apartments could come forward from the 6,373 (gross) sq.m vacant retail floorpsace in Brierley Hill town centre.

Customers' Experience and Behaviour

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

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

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

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

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

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

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

Table 6: Brierley Hill Town Centre: Key Opportunities

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

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

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

Table 7: Brierley Hill Centre: Reasons for Not Visiting

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

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Retailer Representation

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

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

Table 9: Category Composition

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

In May 2020 the centre had none of the 31 top major national comparison retailers present (see table 10 below).

Table 10: Experian Goad list of Major Comparison Retailers

Retailer	May 2020
Argos	No
Boots the Chemist	No
Burton	No
Carphone Warehouse	No
Clarks	No
Clintons	No
Debenhams	No
Dorothy Perkins	No
H&M	No
HMV	No
EE	No
House of Fraser	No
John Lewis	No
Marks & Spencer	No
New Look	No
Next	No
O2	No
Primark	No
River Island	No
Superdrug	No
TK Maxx	No
Topman	No
Topshop	No
Vodafone	No
Waterstones	No
WHSmith	No
Wilkinsons	No

Source: 2020 Goad survey

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

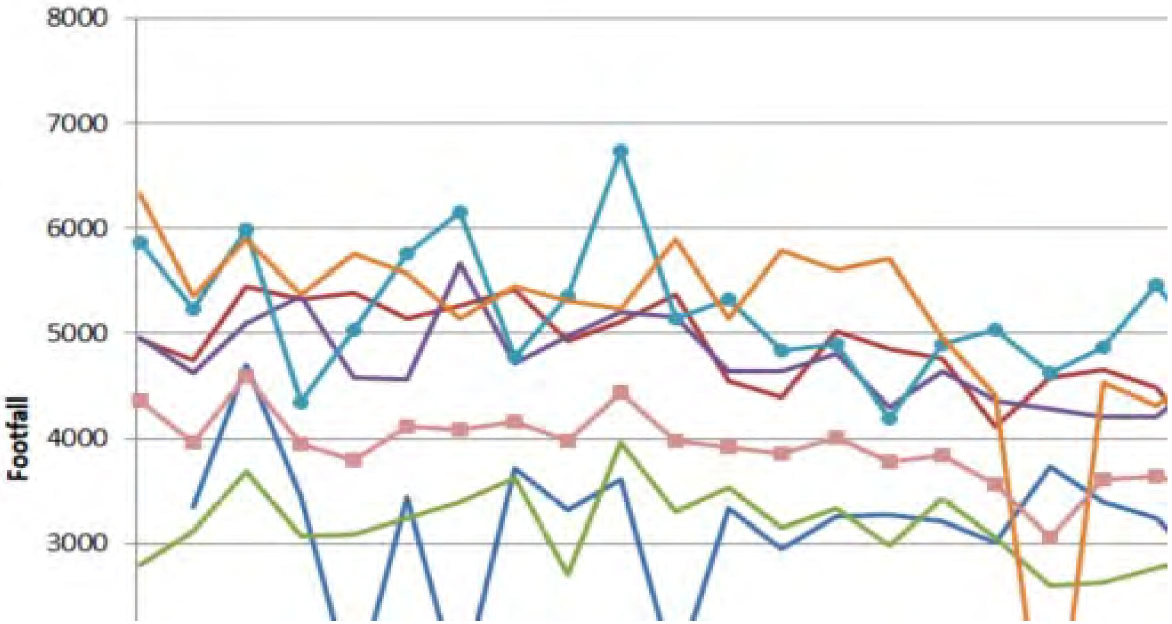
Accessibility and Pedestrian Footfall

Our observation of pedestrian flows in 2019 indicated a strong flow along The Moor Centre and over the intersection with Moor Street to the High Street particularly towards the library and Home Bargains. Additional significant footfall was observed along takeaways and restaurants leading to Talbot Road and Brierley Civic Hall.

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

Footfall data in 2020 and 2021 to date is considered unrepresentative due to the impacts of Covid-19 and associated restrictions.

Figure 4: Pedestrian Footfall by Day of Week (2017)



Accessibility

Road Access:

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

Car Parking:

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

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

Table 11: Car Park Charges

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

Public parking provision is provided at the following locations:

- Cottage Street Car Park - 25 spaces (no Disabled Bays) – Long Stay (Tariff type: Major – Long Stay)
- Little Cottage Street Car Park - 78 spaces (6 Disabled Bays) – Long Stay (Tariff type: Major – Long Stay)
- Chapel Street Car Park - 8 spaces (1 Disabled Bay) – Free parking
- Level Street Car Park - 57 spaces (4 Disabled Bays) – Long Stay (Tariff type: Major – Long Stay)
- Bank Street Zones 2 & 3 Car Park - 98 spaces (3 Disabled Bays) – Long Stay (Tariff type: Major – Long Stay)
- Bank Street Zone 1 Car Park - 37 spaces (3 Disabled Bays) – Long Stay (Tariff type: Major – Long Stay)

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

Private parking provision is found at:

- Insight House Car park - 50 spaces

Other parking provision is found at:

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

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

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

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

Table 12:Bus Stops and Services on Brierley Hill Street

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

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

Connectivity is likely to improve further with the plans for the Wednesbury to Brierley Hill Midlands Metro Line (part of the HS2 West Midlands connectivity package). The Metro extension has recently moved a step closer with utility investigation works having begun in Dudley signalling the start of works to bring the project to extend the West Midlands Metro from Wednesbury to Brierley Hill via Dudley. The Metro extension, which will run from the existing line at Wednesbury through Dudley to Brierley Hill, as well as the Portersfield, Interchange and Institute of Technology are all part of a wider regeneration of Dudley town centre. Key to the transformation will be works to the High Street to improve connectivity and integration with the new Metro terminus linking Brierley Hill to Wednesbury. The Moor Centre will be improved and the town library refurbished, while public toilets will again be reopened in the town centre. The route will operate every six minutes at peak time. This will assist in the potentially bringing in more footfall from surrounding communities.

It was announced in January 2021 that Ultra-Light Rail Partners has won a £60,000 Innovate UK grant to develop a feasibility study and design for a 120-passenger biomethane-powered vehicle with a focus on Covid-19 safety. One idea would be to extend the existing Stourbridge Shuttle service from Stourbridge town centre to Brierley Hill.

Dudley Council are reportedly keen to revamp the part of the Smestow Valley line which runs through the Borough to ensure it is used as much as possible, particularly during winter. Furthermore, given the significant housing developments coming forward in the Tansey Green area the route also provides a sustainable link back into Dudley borough and particularly Brierley Hill Strategic Centre, whilst also potentially providing improved walk/cycle access to the nearby Pensnett

Trading Estate. [Express & Star, 28/09/2020].

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

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

Perception of Safety and Occurrence of Crime

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

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

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

Figure 5: Crime Statistics 2016 – 2019

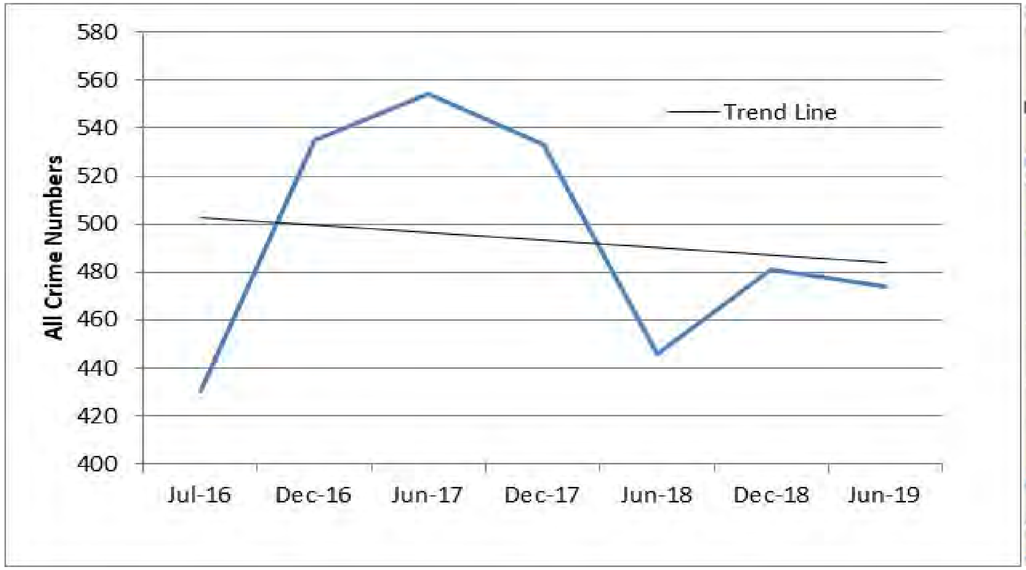


Figure 6: Area of Coverage

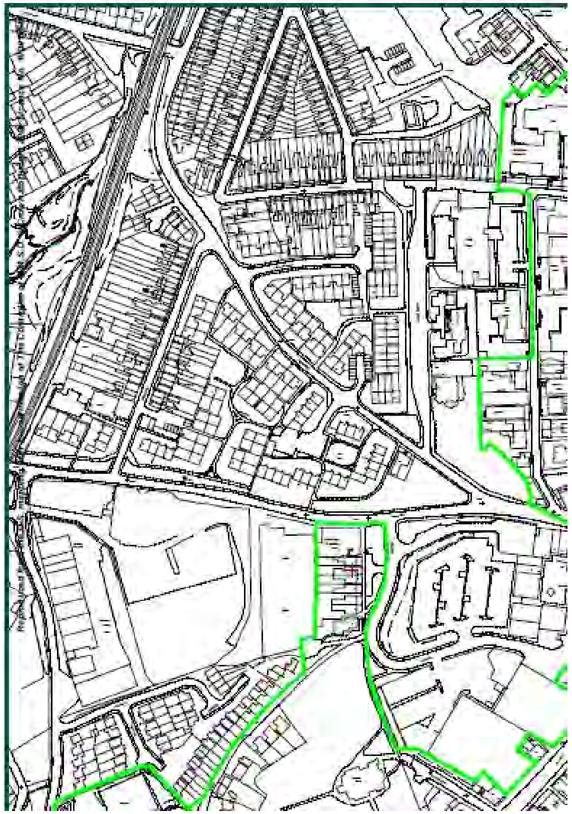
Commercial Rents

Not available.

Environmental Quality - Brierley Hill High Street

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

Figure 7: Brierley Hill High Street Conservation Area Boundary



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

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

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

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

In 2021 The successful Future High Streets Fund bid for Brierley Hill was announced, which will see £10 million investment into the town. Dudley Council also submitted a £25 million bid to Government under the Towns Fund Bid for a University Park in Dudley.

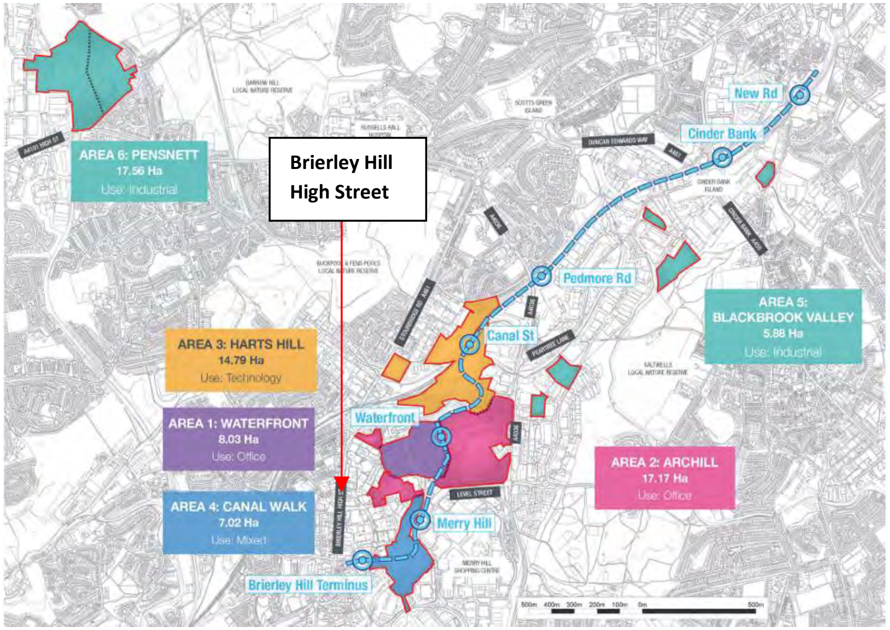
Key to the transformation will be works to the High Street to improve connectivity and integration with the new Metro terminus linking Brierley Hill to Wednesbury. The Moor Centre will be improved and the town library refurbished, while public toilets will again be reopened in the town centre. The funding also allows for development of long-term vacant land known as ‘Daniel’s Land’, located between the Brierley Hill Health and Social Care Centre and the Dudley canal which faces down toward Merry Hill. Part of the plan will be to deliver 270 homes on and close to the High Street to encourage improved footfall and visitor spending.

Lambert Smith Hampton

Brierley Hill: Evidence to Barriers to New Businesses and Existing Businesses Expanding

A review of the local rating list in 2019 shows that for retail premises fronting the High Street the rateable (expressed in price per sqm) the tone varies from £50/sqm to £225/sqm depending on location. As the profile of the centre is very much independent led, the higher level of £225/sqm together with rents and other fixed costs in owning a physical space may be a potential barrier. Furthermore the DY5 Enterprise Zone (EZ) boundary is close to the High Street. The EZ benefits from relief on business rates up to 5 years which is a potential disadvantage to the High Street especially with operators such as office occupiers locating to the EZ. This then the obvious effect of reducing footfall to the High Street.

Figure 8: Brierley Hill High Street in Context of DY5 Dudley's Business and Innovation Enterprise Zone



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

Brierley Hill: Extent of the Evening Economy

The High Street has a high proportion of floorspace devoted to leisure services. This is dominated by 14 fast-food and take away outlets, followed by 4 restaurants, 5 cafes, 3 public houses, 3 bingo and amusement outlets, 4 sports & leisure facilities, 1 casinos & betting offices, 2 clubs. The cafes, public houses, and cubs provide a broad reference for the evening economy. However these are spread along the High Street and there is no facility or venue providing family entertainment. In broad terms, the evening economy is 'functional' and cannot be described as a destination. The extent of provision is also affected by the provision at Merry Hill Shopping Centre and the surrounding facilities, which provide a weather proof venue for social interaction, dining and entertainment in the form of facilities such as national casual dining chains and a cinema.

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

Digital Facilities in Brierley Hill

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

Conclusions

Background to the Brierley Hill High Street health check appraisal

Brierley Hill High Street as a solus entity excluding Merry Hill represents a retail area that serves its immediate hinterland and local community.

Sub-regional shopping hierarchy

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

Diversity of main town centre uses

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

Retailer Representation

The retailer representation across the centre is dominated by the independent sector and it is important to maintain the current level of multiple retailers to retain the attraction and vitality of the centre. The typical size and type of unit also lends towards the independent sector. The centre does not accommodate any of the 31 major national comparison multiples, which is likely due in large part to the proximity to Merry Hill.

Proportion of vacant street level property

Both the Goad data and the Council's own monitoring data indicates a c. 24% vacancy rate which is very high in the context of the national average.

Customer's views and behaviour

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

Pedestrian flows

In 2019 good pedestrian footfall was observed during the day time. The Council's own data shows poor usage during weekends. Updated data will be required after the Covod-19 pandemic has passed.

Accessibility

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

Perception of safety and occurrence of crime

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

Commercial yields and rents on non-domestic property

Not available.

State of the environmental quality

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

Digital facilities in Brierley Hill High Street

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

Strengths of Brierley Hill High Street

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

Weaknesses of Brierley Hill High Street

- High vacancy rate.
- Fascias of varying quality.
- Lack of a diverse evening economy.
- Environmental quality varies within the centre.
- Proximity to Enterprise Zone.
- No recognisable digital or EV charging provision.

Opportunities within Brierley Hill High Street

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

Threats to Brierley Hill High Street

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

Appendix 3: Merry Hill

Strategic Centre: Merry Hill - Health Check Appraisal

The health check covers the following aspects:

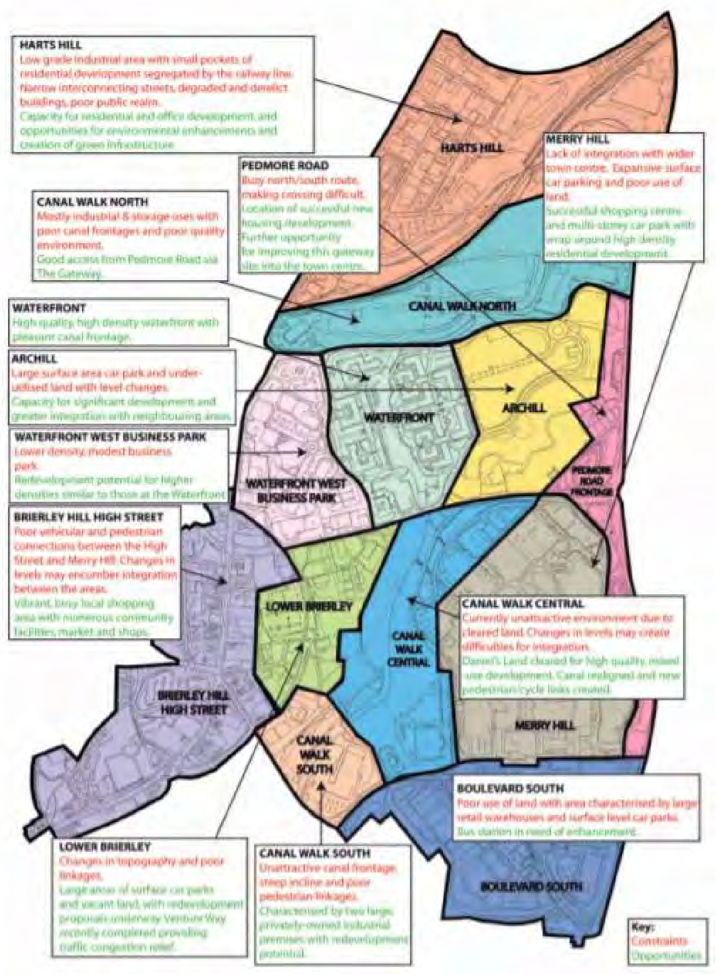
- Sub-regional shopping hierarchy
- Diversity of main town centre uses
- Proportion of vacant property
- Customer's Experience and behaviour
- Retailer representation / Balance between independent and multiple stores
- Pedestrian footfall
- Accessibility
- Perception of safety and occurrence of crime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

To note that this assessment refers specifically to the Merry Hill Shopping Centre (SC) which together with Brierley Hill High Street forms the Strategic Centre. It is noted that the town centre boundary for the strategic centre of Brierley Hill covers a wider area that encompasses the Merry Hill Shopping Centre and the Waterfront, amongst others (see below). From the outset it should be recognised that Merry Hill is a shopping centre of regional significance and its attraction stretches beyond the Black Country sub-region. In June 2020 Intu, the previous owners of the Merry Hill Shopping Centre, fell into administration. London-based Ellandi have taken over from Intu and will oversee the operation and development of the shopping centre on behalf of the consortium of banks that now own it.

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

Lambert Smith Hampton

Figure 1: Brierley Hill Strategic Centre: AAP



Source: Brierley Hill Area Action Plan, Page 2

Figure 2: Brierley Hill Strategic: Core Strategy

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

Sub-Regional Shopping Hierarchy

Table 1: Sub-Regional Shopping Hierarchy

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

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

In terms of the Venuescore data, Merry Hill is a regional centre and within the top 100 centres in the country. Being a purpose built managed shopping centre its ranking reflects its retail offer, representation and unit size. On this basis it is considerably above the other BCLA strategic centres.

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

Diversity of Main Town Centre Uses

Table 2: Number of Units in **Merry Hill SC** (July 2020)

Category	No.	%	UK %*
Convenience	14	4.7	9.1
Comparison	151	50.8	27.6
Retail Service	29	9.8	15.6
Leisure Service	44	14.8	24.5
Financial and Business Service	12	4.0	9.3
Vacant	47	15.8	9
Total			**100**

Source: Goad survey 3/07/2020
*UK average from the All UK Centres Base % in above Goad survey

Table 3: Number of Units in **Merry Hill SC** (July 2020)

Category	Sq.m	%	UK %*
Convenience	10,489	6.8%	15.4
Comparison	110,582	71.4%	31.9
Retail Service	2,555	1.7%	7.2
Leisure Service	10,461	6.8%	25.7
Financial and Business Service	2,518	1.6%	7.0
Vacant	18,228	11.8%	12.2
Total	**154,832**	**100.0%**	**100**

Source: Goad survey 3/07/2020
* UK average from the All UK Centres Base % in above Goad survey

Table 4: Number of Units in Merry Hill SC (April 2018)

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

Source: Experian Goad Category Report, April 2018

Table 5: Composition of Floorspace Merry Hill SC (April 2018)

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

Source: Experian Goad Category Report, April 2018

NB. It should be noted that non-essential shops were closed in the Black Country from 26 March 2020 to 15 June 2020, as part of the Covid-19 lockdown restrictions, and so were closed at the time of the Goad survey (23 May 2020). However, the survey results appear to suggest that retail units were included, even if temporarily closed.

The surveys show that in the two year period April 2018-July 2020 the centre has maintained its size (losing only 1 unit) although there have been some changes between sectors.

Convenience Good Units

There are 14 convenience units in the area according to the 2020 survey representing 4.7% of the total number of outlets. This is approximately lower than the national average of 9.1% but perhaps not surprising given the shopping centre nature of the centre. Also in terms of convenience goods floorspace it ranks lower than the national average (6.8% vs 15.4%). The lower quantum of floorspace provision is to be expected considering the fact that as a regional shopping centre the key area of provision is in the comparison goods category. There has been an increase of three convenience units since 2018 (2 frozen foods stores and 1 CTN).

The convenience provision comprises Bakers & Confectioners (6 units), 2 CTN (Convenience, Tobacco, Newsagent Unit), 2 Frozen Foods stores, 1 Convenience Store, 1 Health Food Unit, 1 Shoe Repair Unit and 1 Supermarket.

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

Comparison Good Units

According to the 2020 Goad survey there are 151 comparison goods retailers located within the shopping centre trading from a total floorspace of 110,582,250 sqm. This represents a loss of six units since 2018 although the floorspace has actually increased slightly. The number of outlets currently represent 50.8.% of total units in the centre, which is significantly above the national average of 27.6%, again reflecting the sub regional shopping centre offer of the centre The current floorspace provision represents 71.4% of total floorspace in the centre, which is double the national average of 31.9%.

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

- There is an above average provision in the following comparison goods categories:
  - Ladies wear & accessories (13 units) – equivalent to 4.4% of outlets and higher than the national average of 1.5%.
  - Telephone & Accessories (11 units) – (3.7% of outlets vs 1.3% nationally)
  - Jewellery, Watches & Silver (10 units) – (3.4% of outlets vs 1.5% nationally)
  - Toiletries, Cosmetics & Beauty Products (9 units) – (3.0% of outlets vs 1.0% nationally)
  - Footwear (10 units) – (3.4% of outlets vs 0.8% nationally)
  - Menswear & Accessories (10 units) – (3.4% of outlets vs 0.6% nationally)
  - Clothing General (10 units) – (3.4% of outlets vs 1.6% nationally)
  - Toys, Games & Hobbies (6 units) – (2.0% of outlets vs 0.7% nationally)

- Furniture General (5 units) – (1.7% of outlets vs 0.7% nationally)
- Sports, Camping & Leisure Goods (6 units) – (2.0% of outlets vs 0.6% nationally)
- Department & Variety Stores (5 units) – (1.7% of outlets vs 0.4% nationally)
- Greeting Cards (6 units) – (2.0% of outlets vs 0.6% nationally)

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

Service Provision

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

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

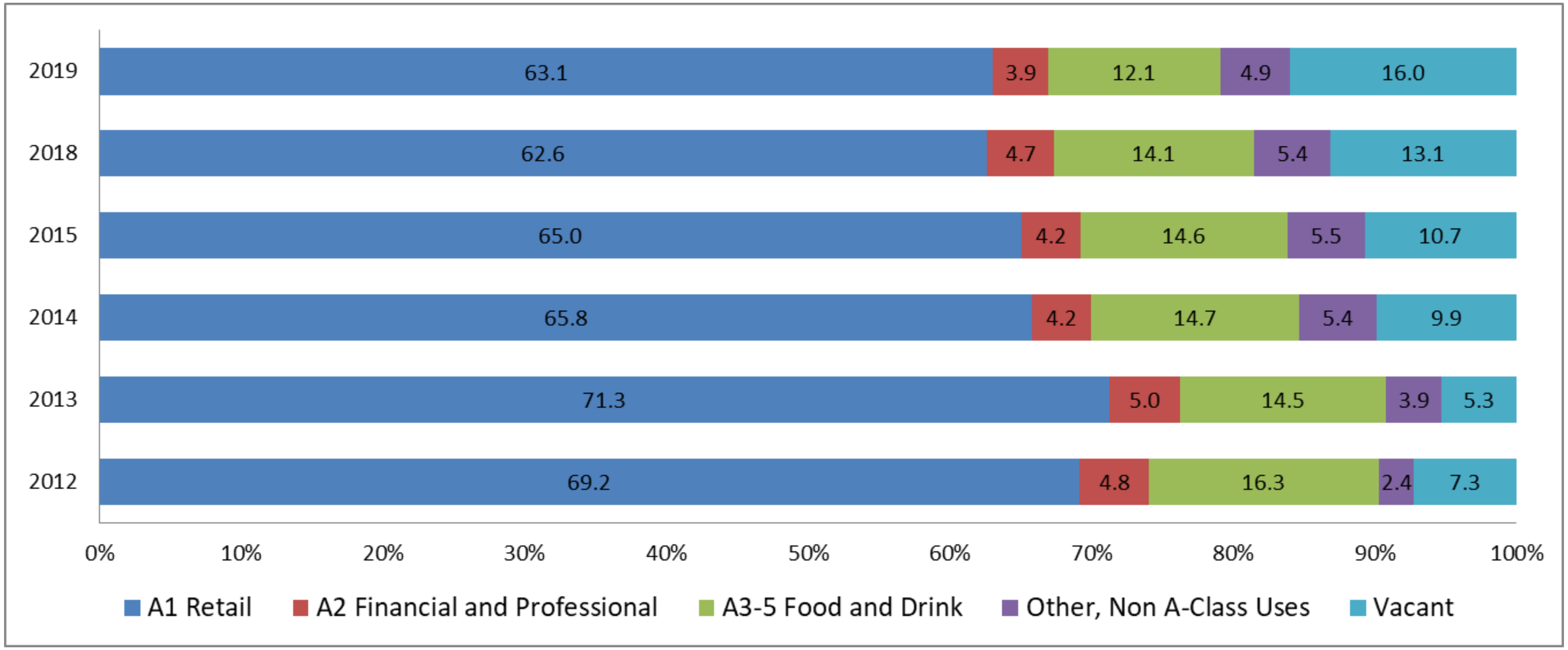
- There are 29 **retail services**, which account for 9.4% of total outlets. This is below the national average of 15.6%. This category is mostly made up of health and beauty outlets (15 units – 1 more than in 2018); opticians (3 units); travel agents (4 units).
- With reference to **financial services**, there are 12 outlets, which represent 4% of total units, which is below the national average of 9%. This category comprises of 8 retail banks, 3 building societies, 1 building supplies & services and 1 employment and careers unit. There is a loss of 1 unit recorded since 2018.
- There are 44 **leisure services** outlets in 2020, a loss of 5 units since 208, which is not surprising given the impacts of the Covid-19 pandemic. Current (2020) provision represents14.8% of total provision which is significantly lower than the national average 24.5%. In terms of floorspace, this stands at 6.8%, which is significantly lower than the national average of 25.7%. Leisure provision is dominated by 17 fast food and take away outlets, followed by 14 cafes, 9 restaurants, 1 casino & betting offices, 1 bingo and amusement outlet, 1 cinema and 1 public house. Losses have been spread proportionately amongst these uses. Commercial leisure is seen in the form of Odeon, Burger King, Frankie & Benny's, McDonalds, KFC, Five Guys, Frankie & Benny's, Hotel Chocolat, Wetherspoon, Krispy Kreme, Nando's, Starbuck's, Subway, Pizza Express (closed since the date of survey), Greggs, Pizza Hut and Costa, all of which have survived the last two years.
- In summary, there is low service provision for retail and financial services but comparatively stronger leisure service provision. The latter being dominated by a range of national chains including casual dining fascias that are a key footfall attractor to the centre.

Proportion of Vacant Property

The 2020 Goad data for Merry Hill indicates that there are 47 vacant outlets representing a vacancy level of 15.8%, which is higher than the national average of 9%. Vacancies represent 11.8% of total floorspace and is actually lower than the national average of 12.2%. There has been a large rise in the number of vacancies – with 7 more vacant units than in 2018.

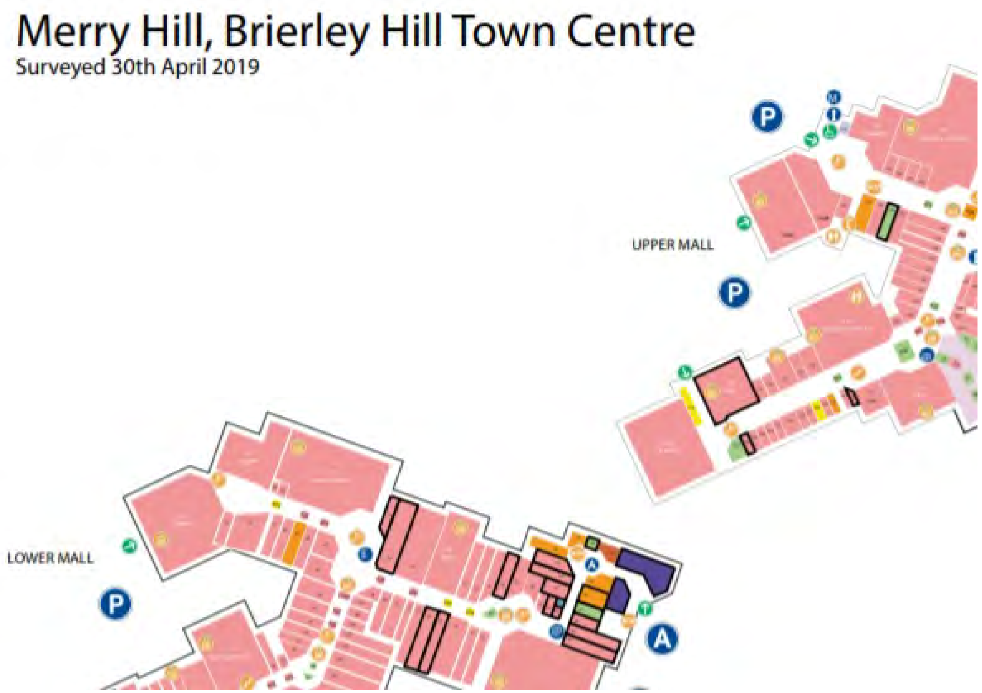
Analysis of the Council's own monitoring information (based on Use Class) shows that this forms part of a longer-term trend, with vacancies rising since 2014..

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



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

Figure 4: **Merry Hill: Dudley MBC Area of Healthcheck**



Customers' Experience and Behaviour

The household telephone interview survey (HTIS) undertaken in 2019 asked specific questions on respondents' views and perceptions of their local city or town centre. For those whose nearest centre was Merry Hill Shopping Centre, the overwhelming majority of the respondents visited either every two weeks (40%); 2-3 days a week (25.4%); Monthly (13.9%); and one day a week (13.7%). Some 6.9% frequent the centre daily.

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

Table 6: Merry Hill Shopping Centre: Top 'Likes'

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

Source: HTIS 2019

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

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

Lambert Smith Hampton

Merry Hill: Retailer Representation

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

Based on the 2018 Goad Category Report, there were 200 multiple retailers (67%) out of a total count of 298 outlets. In terms of floorspace this represents 125,186 sq m (1,347,500 sq ft) out of a total of 154,989 sqm (1,668,300 sq ft) i.e. 81% of total floorspace.

Table 7: Category Composition (2018)

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

In 2020, the Goad survey revealed that the centre had retained an excellent representation of the 31 major national multiple comparison retails, with 26 of the retailers present, many with more than one store in the centre (see Table 8 below).

Since the date of the survey, the centre has been affected by national closures and consolidations.This has resulted in four of the major national multiples being lost, comprising the three Arcadia Group retailers present and Debenhams. The centre also lost Pizza Express and Oasis as part of national closures. HMV was saved after last minute talks, and Mountain Warehouse was lost. The centre did not have a House of Fraser and so was not affected by consolidation of these stores, nor a John Lewis. The loss of Debenhams now leaves the centre with only Marks & Spencer’s as the only major anchor, with no other department stores and no supermarket.

Table 8: Experian Goad list of Major Comparison Retailers

Retailer	July 2020
Argos	1
Boots the Chemist	2
Burton	1*
Carphone Warehouse	1
Clarks	1
Clintons	1
Debenhams	1*
Dorothy Perkins	0
EE	2
H&M	2
HMV	1
House of Fraser	0
John Lewis	0
Marks & Spencer	3
New Look	1
Next	1
O2	1
Primark	2
River Island	2
Superdrug	1
TK Maxx	2
Topman	2*
Topshop	2*
Vodafone	1
Waterstones	2
WHSmith	0
Wilkinsons	0

Source: Goad survey 2020

*closed since 2020 survey

-

Pedestrian Footfall

On our 2019 site visit, we observed strong pedestrian flows within the centre. Of particular note was around the food court area and Primark.

The Centre’s website reports that the centre “welcomes 22 million visitors”. This underpins the scale of attraction to the centre.

More recent footfall data for 2020-21 is not considered representative due to the impacts of Covid-19 and associated restrictions.

Lambert Smith Hampton

Accessibility

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

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

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

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

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

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

In February 2021, West Midlands Mayor Andy Street announced plans to open up eight new Metro lines and 21 new rail stations as part of a scheme to revolutionise public transport across the region. This will improve public transport accessibility to Merry Hill.

Table 8: Bus Stops and Services at Merry Hill

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

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

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

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

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

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

Perception of Safety and Occurrence of Crime

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

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

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Commercial Rents

Agent sources estimate that Prime Zone A rents in Merry Hill Shopping Centre were in the range of £2,153/sq/m (£200/sq ft) in 2019.

Promis reported that at the end of 2020 the centre was achieving prime Zone A rents of £140/sq/ft. This is excellent in comparison to a national average of £74/sq.ft. It does represent an 11.2% per annum reduction for 2017-2020, however in the same period the UK average fell by 12.45. The centre is therefore holding up very well.

Environmental Quality - Merry Hill

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

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

A £10m project to revamp the Centre's external walls and entrances was commenced in January 2021. This included installed high-tech panelling with colour-changing lighting and the ability to display messages.

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Merry Hill: Evidence to Barriers to New Businesses and Existing Businesses Expanding

We are not aware of any immediate barriers to entry.

Merry Hill: Extent of the Evening Economy

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

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

In this way it can be seen that during weekdays there is late closure (albeit limited to a maximum of 9pm) that will satisfy a wide audience and especially families that seek to dine out or purchase a take away. Within the centre the leisure provision is dominated by 17 fast food and take away outlets, 14 cafes, and 9 restaurants. As stated previously, it is reported that the owners are planning further improvements to include a new cinema and an expanded leisure and dining area. The extent of provision shows a good representation from national chains (e.g. Burger King, KFC, McDonalds, Costa Coffee, Krispy Kreme Doughnuts, Chopstix, Greggs, Hey Potato, Starbucks, Subway, Wrapchic) and other casual dining chains (e.g. Five Guys, Nando’s, Pizza Express (closed since the date of survey), Pizza Hut). The siting of these in a covered weather proof location provides a space for social interaction, dining and entertainment.

Digital Facilities at Merry Hill

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

Conclusions

Background to the Merry Hill health check appraisal

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

Sub-regional shopping hierarchy

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

Diversity of main town centre uses

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

Retailer Representation

The shopping centre as would be expected is dominated by multiple retailers representing some 51% of units and 71% of the floorspace. Although there has been a significant decline in this sector in the last 2 years, largely associated with national closures and consolidations, the centre retains a very good national multiple representation.

Proportion of vacant street level property

Both the Goad data and the Council's own monitoring data indicates a circa. +16% vacancy rate which is higher than the national average, although better than other Strategic Centres in the Black Country,

Customer's views and behaviour

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

Pedestrian flows

Good pedestrian footfall was observed prior to the Covid-19 pandemic in 2019 and the centre was reported to receive 22 million visitors underpinning the scale of attraction of the centre. New footfall data will be required to assess the post-pandemic recovery.

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

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

Commercial rents
Prime Zone A rents in Merry Hill Shopping Centre are estimated to be in the range of £2,153/sq/m (£200/sq ft) in 2019.

State of the environmental quality
The centre has a high environmental quality and is well managed. A recent scheme has improved and modernised the exterior of the centre.

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

Strengths of Merry Hill

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

Weaknesses of Merry Hill

- Higher than average vacancy rate.
- Only four EV charging points considering the quantum of car parking provision.
- Lack of cycle parking and facilities.
- The centre now only has Marks & Spencer as the sole remaining anchor store following the closure of Debenhams.

Opportunities within Merry Hill

- Additional leisure extension (scope of which at this stage remains yet to be determined).
- Potential to increase EV charging points.

Threats to Merry Hill

- The state of the retail economy – national closures and consolidations
- Rising vacancy rate not being addressed.

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Appendix 4: West Bromwich

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West Bromwich Town Centre Health Check Appraisal

Context

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

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

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

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

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

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

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

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

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

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Sub-Regional Shopping Hierarchy

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

Table 1: Sub-Regional Shopping Hierarchy

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

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

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Photographs of West Bromwich Town Centre

New Street, the covered street by Tesco Extra


High Street, with outdoor market


New Square


New housing on corner of High Street/Bull Street

High Street, east of Bull Street


The King's Centre

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Diversity of Main Town Centre Uses –2019-2020

Table 2: Number of Units in West Bromwich Town Centre (Sept 2020)

Category	No.	%	UK %*
Convenience	37	9.7%	9.1
Comparison	124	32.5%	27.6
Retail Service	51	13.4%	15.6
Leisure Service	66	17.3%	24.5
Financial and Business Service	36	9.4%	9.3
Vacant	68	17.8%	9
Total	**373**	**100**	**100**

Source: Goad survey 29/09/2020
*UK average from the All UK Centres Base % in above Goad survey

Table 3: Number of Units in West Bromwich Town Centre (Sept 2020)

Category	Sq.m	%	UK %*
Convenience	21,126	18.5%	15.4
Comparison	41,788	36.6%	31.9
Retail Service	6,317	5.5%	7.2
Leisure Service	17,494	15.3%	25.7
Financial and Business Service	7,683	6.7%	7.0
Vacant	19,798	17.3%	12.2
Total	**114,206**	**100.0%**	**100**

Source: Goad survey 29/09/2020
* UK average from the All UK Centres Base % in above Goad survey

Table 4: Number of Units in West Bromwich Town Centre (SeptJ 2019)

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

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

Table 5: Floorspace in West Bromwich Town Centre (Sept 2019)

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

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

Goad analysis has been obtained for the centre and compared with a site visit in 2019. This allows useful comparisons to be made with both the previous healthcheck and with the national average. In total West Bromwich has 373 units, the same number as in 2019.,

Convenience Good Units

The centre is anchored by a large Tesco Extra and this is reflected in the floorspace figures, with the proportion of convenience retail being 10% higher than the national average. When this superstore is excluded though, the situation is very different, with the overall number of units (37) being 5% less than the national average by proportion. The other main convenience units are the indoor market, Iceland and Farmfoods. Tesco has no real competition. There has been a slight growth in this sector locally since 2015 (six additional units and a small increase of around 500 sq.m).

There is a healthy convenience sector in West Bromwich, anchored by a large Tesco Extra. The 2020 Goad survey recorded 37 convenience units; one less than in 2018. This is seen as consistently slight reductions in the representation of this sector since 2018, by both numbers of units and floorspace. This represents 9.7% of the number of units and 18.5% of total floorpsace in the centre. This position needs to be read alongside a changing national picture from 2019-2020: when the proportion of this sector by number of units fell by 6% but increased by 6% in term of floorpsace - which can be explained by the sector becoming more dominated by larger supermarkets than smaller, but more numerous, independents. Whilst West Bromwich was previously quite different from the national average it is now more typical; in this sense it was somewhat ahead of the curve previously with the large Tesco Extra store.

Comparison Good Units

The centre has a relatively healthy amount of comparison units (124, 2 more than in 2019). This is significantly above the national average (32.5% compared to 27.6% by proportion of units and also 5% above the national average by floorpsace). Furthermore, it has increased slightly in 2019-2020 at a time when it has fallen dramatically nationally over the same period (36% to 28% as proportion of unit). This positive position is likely to be in large part supported by the new retail units alongside Tesco Extra. These was built in 2013 and mostly fully let in 2015 and are now all let.. Comparison goods units are very clearly concentrated in a central band comprising New Street, parts of the Queen’s Centre, in the central portion of High Street and in the King’s Centre. This is effectively anchored by the Tesco Extra and Indoor market at either end. Outside of this there are generally only a few specialist retail units. Astle Outlet Park provides comparison goods retail of a different type and this remains well-let. This is a similar situation to 2019.West Bromwich benefits from having these comparison destinations within its town centres, where they would often be located edge-of-centre or outside the centre in other towns.

Retail Services

The retail service offer has grown significantly in West Bromwich from September 2019 to September 2020, with 7 units being added (growing from 44 to 51 units), The sector now represents 13.4% of the units, which is still below the national average of 15.6%. The sector is dominated in West Bromwich by health & beauty, which accounts for 31 of the 51 stores. This sector (which is largely immune from internet impact) is likely to have increased to fill units becoming available as other sectors decline. This has been a national trend and is more prevalent in smaller centres, which explains why the proportion is slightly lower in West Bromwich. This only accounts for 5.5% of the total floorspace, which is not surprising as these services are generally delivered in small units.

Leisure Services

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

The leisure services sector has increased by 10% since 2019, now accounting for 66 units; this is 17% of the centre by number of units and 15% by floorspace. This is still significantly below the national average (25% by both measures). Nevertheless, although it is under-represented, West Bromwich has done well to significantly increase its leisure sector at a time when leisure has been hit hard by Covid-19 restrictions and only slightly increased nationally.

Financial and Business Services

The financial and business sector has seen the loss of 2 units from 2019-2020, falling from 38 to 36 units. At the same time this represents an increase in its proportion by unit numbers (as other sectors have declined more) and a decrease in proportion by floorspace. All of this is very much consistent with national trends. The centre has retained branches of all the large national six banks, and has 11 retail banks in total, making this a healthy sector in the town.

Proportion of Vacant Street Level Property

The centre currently has 68 vacant units, 3 less than in 2019, and representing 18% of total units (a slight reduction from 19% in 2019). Whilst this vacancy rate is very high, being 9% worse than the national average, it does represent an improvement since 2019, and comes at a time when most other centres have experienced a decline. The recent low point for West Bromwich was in 2015, when 1 in 4 shops were vacant. The centre has also grown slightly, rising from 365 units in 2015, and maintain this number over a difficult two years from 2018-2020. The fact that we have not seen recent decline is a positive sign but the high number of vacancies does still suggest that the centre may be unsustainably large and requires consolidation.

Many of these vacancies are within the Queen’s Square Centre, where only 40% of the units are occupied. If these were removed from the total, the vacancy rate would be significantly improved so this is clearly the main contributor to the centres vacancy levels.

There has been interest from a local property developer in acquiring and regenerating the Queen’s Square Centre. Future High Street Living has been in talks with Sandwell MBC and the West Midlands Mayor about acquiring and redeveloping the centre for a mix of new retail and residential development [Express & Star, 22 May 2021].

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Potential for Transition to Residential

Recent changes to planning legislation introduced by Government (22 July 2020) allow for easier transition from town centres uses to residential use. Class MA introduces a new permitted development right to allow for the change of use from Commercial, Business and Service use (Class E) to residential use (Class C3). Under the Town and Country Planning (General Permitted Development) (England) (Amendment) (No.3) Order 2020 (S.I. 2020.No. 756) owners of vacant and redundant buildings of a footprint of up to 1,000 square metres are able to fast-track the planning process for demolishing and rebuilding them as new residential developments within the footprint of the original building, up to a maximum height of 18 metres, including up to 2 storeys higher than the former building.

As a simple 'rule of thumb' indication we have used the current (as provided in this report) extent of vacant floorspace as a basis to estimate how many apartments could potentially be delivered as a maximum. However, there are several limitations in this approach that should be noted. It is considered unlikely that many individual shop units within a high street would be converted to residential on an ad-hoc basis, nor would this approach be generally desirable from a design perspective. Market values are likely to determine to a large degree the distribution of residential conversions/re-developments. A more co-ordinated approach would also lead to a more coherent distribution of town centre and residential uses, which would preserve the critical mass of a town centre core, preserving the continuity of key high street frontages, whilst enabling better sustainable residential environments to come forward. The simple approach outlined here does also not account for more complex transitions, such as the large scale, positive, potential for delivering vertical mixing of uses – with apartments above retail and other active ground floor uses; nor for more comprehensive redevelopment to deliver consolidated areas of new residential development at town centre fringes with larger and higher density apartment blocks, which could deliver a greater density of development. These could be on the site for larger vacant floorspace units (e.g. former large flootprint stores) or other larger 'windfall' sites. Similarly, the current approach does not consider the potential for conversion of office uses to apartments, which could represent a significant additional component of residential transition. For all of these reasons it is recommended that a more considered Urban Capacity Study approach is followed for each centre to reflect a more accurate and desirable approach to residential transition.

Nevertheless, the vacant floorpsace approach has some value in providing broad headline figures for comparative purposes. The calculation is based on the following formula:

- Vacant floorspace total (taken from Table 3 above)
- We have then assumed that 25% of this floorpsace may come forward for residential. This same percentage was used in the recent Cannock Chase District Housing Development Capacity Study [CCDC, March 2021]
- We have assumed that the new residential development will be 3 storey. Most retail buildings in the town centre are 2-3 storey, with the floorspaces in Table 3 (and in Goad surveys) only representing ground shopfloor area. The Permitted Development Rights also allow an increase of up to 3 storeys to the existing building. Three storeys is therefore considered to be a reasonably modest assumption.
- We have subtracted 15% for communal circulation space - this is considered to be a reasonable assumption for an efficient layout.
- We have applied an average apartment size of 65 sq.m. This is based on the English Household Survey (2018) which states that the average mean usable floor area of a converted flat was 65sqm. It also compares consistently to the Nationally Described Space Standards [DCHLG, 2015] which indicates a range between for 51-72 sq.m for 1 and 2 bed apartments.

On this basis it may be estimated that **c.200** apartments could come forward from the 19,798 sq.m (gross) vacant retail floorpsace in West Bromwich town centre.

Customers' Views and Behaviour

NEMS undertook a telephone customer survey in support of this study in 2019. We have extrapolated from this zones 16 and 17 as representing the main users of West Bromwich Town Centre (for these zones more than 25% identify Walsall as their location for comparison goods (fashion) shopping [Q22] and/or for other town centre uses [Q4] or when combining food shopping with other activities [Q6]). This then reveals the following (using weighted percentages):

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

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Retailer Representation and Intentions to Change Representation

In 2015 the centre had only 13 of the 31 major comparison retailers. This represents a decline after the recent increase in major retailers since the opening of New Street (rising from 12 to 15 in 2015-2019) The town centre lacks any of the major department stores. Although there is a Marks & Spencer's store it is an M&S Outlet store within Astle Retails Park.

The centre has lost four major comparison goods retailers since July 2019. These are all associated with national closures: Carphone Warehouse and three stores of the Arcadia Group (Topshop, Top Man and Dorothy Perkins). TopShop and Dorothy Perkins previously shared the same unit.

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

Table 6: Experian Goad list of Major Comparison Retailers

Retailer	July 2019	Sept 2020
Argos	Yes	No
Boots the Chemist	Yes	Yes
Burton	No	No
Carphone Warehouse	Yes	No
Clarks	Yes	Yes
Clintons	No	No
Debenhams	No	No
Dorothy Perkins	Yes	No
EE	`No	Yes
H&M	Yes	Yes
HMV	No	No
House of Fraser	No	No
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	No	No
Superdrug	Yes	Yes
Tesco Extra	Yes	Yes
TK Maxx	No	No
Topman	No	No
Topshop	Yes	No
Vodafone	Yes	Yes
Waitrose	No	No
Waterstones	No	No
WHSmith	No	No
Wilkinson's	No	No

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

Pedestrian Flows

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

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Accessibility

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

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

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

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

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

Walking, Cycling and Disabled Access:
The centre is generally level, the core areas benefit from pedestrianisation and a well-considered public realm design. Consequently it is easy to navigate on foot

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

There are planned improvements to sustainable travel modes. In December 2020 a trial of E-scooters was launched in West Bromwich town centre. The West Midlands Mayor has also announced plans to open new Metro lines and 21 new rail stations across the West Midlands by 2040.

Perception of Safety and Occurrence of Crime

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

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

Source: *UK Crime Stats*

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Commercial Rents on Non-Domestic Property

The Promis report (2020) summarises that prime town centre rents at the end of 2020 for Zone A were £25/sq.ft. This represents a very large decrease (28.6%) from £35/sq.ft at the end of 2018 [Promis report, 2018). This is a weak position compared to the Promis 2020 200 Centres average of £74.. It also represents a much larger decrease than occurred from 2017-2018 (12.5% decrease) and a larger decrease than the national average. The town centre is performing poorly and it is getting worse in terms of rents, which is a concerning signal. However, as we have seen across the UK, the correction in Zone A rents may be allowing space to be more affordable to tenants which is a key contributor to the recorded reductions in vacancies.

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Environmental Quality

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

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

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

In February 2020, it was announced that West Bromwich was named as one of 20 pilot schemes for the Government's Towns Fund, aimed at reversing the fortunes of ailing town centres. A masterplan is currently being developed by Savills. The aims of this masterplan have been described by Savills "we're also focusing on the revitalising the high street area, where much of the town's retail offer is tired and outdated, we need to create a safe and welcoming town centre with a modern mix of housing, retail and employment." The Masterplan should be completed by mid-summer 2021.

Other improvements to the town centre are underway. This includes demolition of the Queen Square multi-storey car park, with the site being developed for a mixture of homes, leisure and retail facilities. Funding was provided to support this from the West Midlands Combined Authority.

In December 2019 plans were unveiled for the development of Victoria Court, on Victoria Street. This development consists of 49 apartments and four commercial retail units and is the first privately-funded development of its kind in the town centre.

Digital Facilities in West Bromwich Town Centre

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

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

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

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

Conclusions

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

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

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

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

Recommendations

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

The forthcoming Towns Fund being prepared by Savills will play a vital role in revitalising the town centre. The most recent similar exercise is the West Bromwich Area Action Plan (AAP), which was adopted in 2012. Several schemes within this have now been delivered, and the Council are promoting other initiatives (for example the West Bromwich East mixed use proposals for the town centre area east of Ringway). The town centre, as a retail destination, is likely to need further consolidation from that envisaged here. It is also vital that any area where contraction from retail is identified has a clear new non-commercial role. Based on our this healthcheck analysis our initial recommendations are that:

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

currently – within the town centre but outside the Primary Shopping Area. This should continue in its current role: as a focus for civic, community and evening leisure uses. This area should be increasingly promoted as a distinct quarter, with its own name and brand (St Michael's) and should be the focus of new high quality evening leisure (food and beverage) uses, capitalising on the high quality environment and its heritage assets. Finding a suitable new use for Astle House will be an important part of this. There is an opportunity to capture food and drink trade from visitors to the Astle Retail Park.

- Serious consideration must be given to the future of Queen's Square. This should include a market-led approach, considering a wide range of potential uses, including non-retail town centre uses. It is an important thoroughfare through the centre and should be maintained as a pedestrian route through in any redesign.
- With the closure of The Public there is a need for a more significant evening leisure use to anchor New Square (alongside the existing Odeon). The potential to provide this within Queen's Square – within the one large vacant unit, or in a series of vacant units within a co-ordinated environment, should be explored. This is likely to require further refurbishment and conversion. Providing such an anchor, to meet 21st century leisure needs, could also serve to anchor food and drink uses within Queen's Square and on the vacant units facing the square.
- Consideration also needs to be given to the outdoor market on High Street. Whilst the benefit that this has on providing vibrancy and footfall is welcomed, it does present an untidy appearance and jars with the high quality appearance of the public realm here. Re-organisation of the market should be considered, to retain the presence of the street market but by providing new stalls and an improved, more co-ordinated appearance. This needs to be properly funded to be of a sufficiently high quality.
- On the periphery of the town centre there is evidence of a number of well-designed residential development uses that have been developed with innovative design and public realm which contribute positively to the areas vibrancy and are well connected to the retail core.

Appendix 5: Walsall

Walsall Town Centre Health Check Appraisal

Context

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

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

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Sub-Regional Shopping Hierarchy

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

Table 1: Sub-Regional Shopping Hierarchy

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

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

Photographs of Walsall City Centre


Lichfield Street

St Paul's Street

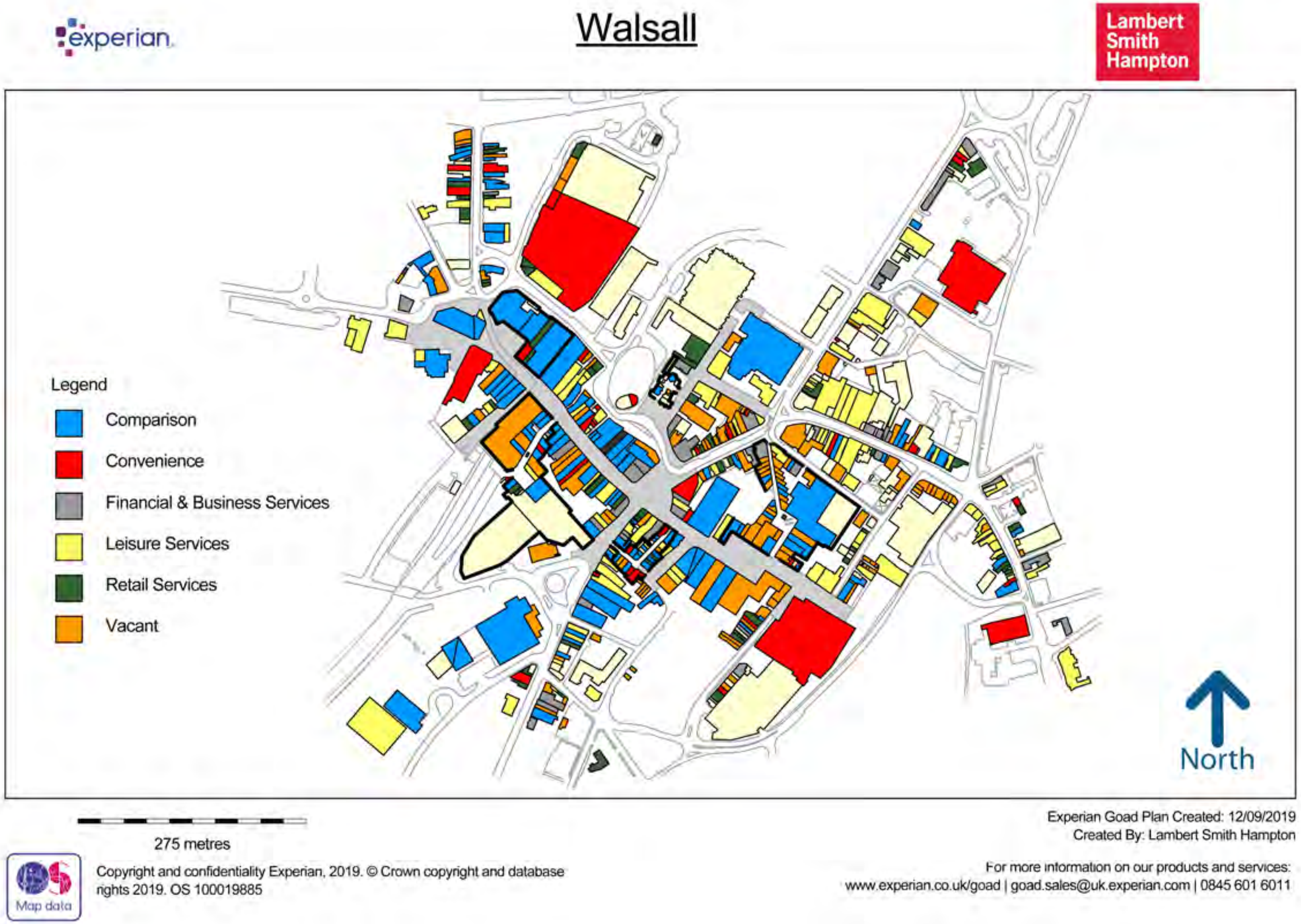
The Saddlers Centre

Bridge Street


The Bridge


Park Street

Diversity of Main Town Centre Uses (Map dated July 2019)



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Diversity of Main Town Centre Uses – July 2019

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

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

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

Table 3: Floorspace in Walsall Town Centre (July 2019)

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

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

Convenience Good Units

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

Comparison Good Units

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

Retail Services

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

Leisure Services

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

Financial and Business Services

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

Proportion of Vacant Street Level Property

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

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

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

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

Customers' Views and Behaviour

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

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

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

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

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

Lambert Smith Hampton

Retailer Representation and Intentions to Change Representation

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

Table 4 compares the number of top national retailers within Walsall Town Centre centre in 2019 and 2009. Walsall has 17 of the top 26 retailers present; nine are absent, however five of the top retailers present are at Crown Wharf (see below). Some of these retailers have experienced nationwide issues of entering administration and others have closed their Walsall stores as part of a wider consolidation strategy (e.g. M&S). In Walsall the surviving stores are mostly located in the three shopping precincts (especially Old Square) and on Park Place. The Debenhams store, although still open, appears to not be used to full capacity and was not attracting many customers on the day of the survey.

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

Table 4: Experian Goad list of Major Comparison Retailers

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

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

Pedestrian Flows

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

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

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

Accessibility

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

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

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

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

Perception of Safety and Occurrence of Crime

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

Source: *UK Crime Stats*

Commercial Rents on Non-Domestic Property

The Promis report (August 2019) summarised the following:

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

Environmental Quality

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

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

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

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

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

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

Digital Facilities in Walsall City Centre

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

Conclusions

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

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

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

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

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

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

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

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

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

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