# Redditch Borough Council

## TOWN CENTRE & RETAIL STUDY

**September 2008**

**WHITE YOUNG GREEN PLANNING**

**DOCUMENT VERIFICATION**

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# 1.0 Introduction

**Background**

1.01 Redditch Borough Council instructed White Young Green to prepare a Town Centre and Retail Study to help inform policies of the emerging Local Development Framework (LDF). Work began in February 2008.

**Objectives of the Study**

1.02 The key objectives of the Study are as follows:

- To assess retail expenditure capacity up to 2026;
- To undertake a household shopping survey to establish shopping patterns and to inform the healthchecks of Redditch Town Centre and the District Centres in Redditch;
- To provide an assessment of commercial leisure facilities available to the Borough's residents;
- To present a appraisal of alternative sites for retail development in accordance with the requirements of the sequential approach set out in PPS6;
- To provide a town centres and retailing strategy for the Borough in the context of the wider sub-regional hierarchy.

1.03 In undertaking the Study, White Young Green were required to:

- Be inclusive and involve local stakeholders. To this end, a meeting with key town centre potfolio holders in the town centre and the owners of the Kingfisher Centre has taken place. Matters discussed are incorporated into the relevant parts of the study;
- Summarise retail and leisure trends and define the pressures that are affecting the Borough;
- Undertake a vitality and viability audit of each centre using the key indicators set out in PPS6 and identify strengths and deficiencies in the retail and leisure sectors and other town centre uses;

- Recommend an overall strategy for the centres in the Borough, including where necessary an appropriate Action Plan which includes recommendations on the ability of centres to accommodate new development.
- Determine the hierarchy of centres within the sub-region, the strength, role and function of each, and how these roles and functions are likely to change in the future, taking into account pipeline developments;
- Determine the market share and catchment area of Redditch Town Centre;
- Determine the quantitative and qualitative need for additional retail facilities in the Borough over the periods to 2013, 2018, and 2026;
- Identify any specific constraints to accommodating development, strategies and aspirations and how these might be overcome; and
- Supply baseline data for future monitoring.

**Study Structure**

1.04 The study is structured as follows:

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| Section 2 | Provides a summary of the relevant planning policy background |
| Section 3 | Contains a review of current and likely trends in the shopping industry at the national level which could influence the need and future demand for additional retail floorspace. |
| Section 4 | Provides an overview of shopping facilities within the Borough and in the wider region, and assesses the levels of vitality and viability in Redditch Town Centre and the District Centres in the Borough. Reference is made to the results of the household shopping survey and on-street survey, commissioned as part of this Study. |
| Section 5 | Describes shopping patterns for convenience and comparison goods derived form the household shopping survey. |
| Section 6 | Contains a quantitative assessment of convenience and comparison goods expenditure capacity using the results of the household survey as the basis for assessing existing shopping |

patterns.

| | |
|---|---|
| Section 7 | Includes a review of trends in the commercial leisure industry and examines the need for additional leisure development in the Borough. |
| Section 8 | Presents the recommended strategy for retailing and leisure uses in Borough. |
| Section 9 | Provides a summary of the main findings and conclusions. |

# 2.0 Policy Background

**National Policy**

2.01 *Planning Policy Statement 6: Planning for Town Centres* (PPS6) sets out the Government's national policies and principles relating to the future of town centres and the main uses relating to them. These policies should be taken into account by local planning authorities in the preparation of local development frameworks (LDFs). The LDF is a folder of local development documents prepared by local authorities that outline the spatial planning strategy for the local area.

2.02 The Government's key objective for town centres is to promote their vitality and viability by:

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

2.03 Through local development documents, local planning authorities should implement the Government's objectives by planning positively for town centres and, in particular, should:

- Develop a hierarchy and network of centres;
- Assess the need for further main town centre uses and ensure there is the capacity to accommodate them;
- Focus development in, and plan for the expansion of, existing centres as appropriate, and at the local level identify appropriate sites in development plan documents;
- Promote town centre management, creating partnerships to develop, improve and maintain the town centre, and manage the evening and night-time economy; and
- Regularly monitor and review the impact and effectiveness of their policies for promoting vital and viable town centres.

2.04 This study seeks to inform the formulation of policies which address these principles and objectives. In accordance with PPS6, the study will:

- Assess the need for new floorspace for retail uses, taking into account both quantitative and qualitative factors;
- Identify deficiencies in retail and commercial leisure provision, assess the capacity of existing centres to accommodate new development;
- Identify centres where development will be focused; and
- Identify potential areas for development in accordance with the sequential approach placing first preference on sites within centres.

**West Midlands Regional Spatial Strategy (formerly RPG11)**

*2.05* The West Midlands Regional Spatial Strategy (RSS) defines Birmingham / Solihull, the Black Country, Coventry and North Staffordshire conurbation as the Major Urban Areas (MUA) and these are the main focus for major development, particularly housing and economic growth, over the period to 2021.

2.06 The strategy identifies a network of 25 town and city centres (Policy PA11) which will be the focus for major retail development (over 10,000sq.m.gross floorspace), and uses that attract large numbers of visitors. The network includes Redditch and Kidderminster. The policy acknowledges that there are many other centres in the Region which meet local needs and development plans should identify and develop policies for these centres within their respective areas to meet local needs. The strategy urges local authorities to be pro-active in encouraging appropriate development to maintain and enhance their function as town centres.

**West Midlands Regional Spatial Strategy (WMRSS) Phase Two Revision**

2.07 The Phase Two Revision identifies a group of towns as Settlements of Significant Development (Policy CF 2). Redditch is designated as one of these settlements, although it is noted that Redditch Borough Council have challenged this designation. These settlements are considered capable of balanced and sustainable growth, with development primarily aimed at meeting the economic and social needs of the area rather than attracting out-migration from the MUAs (Major Urban Areas). As a result the provision of new housing and major retail, leisure and office developments outside of the MUAs will generally be located in these settlements.

2.08 The Phase Two Revision also identifies sub regional Housing Market Areas. Redditch is included in the sub regional South Area together with Bromsgrove, Malvern Hills, Stratford on Avon, Warwick, Worcester, Wychavon and Wyre Forest.

2.09 In direct reference to Redditch, the Phase Two Revision highlights that the level of housing required to meet the needs of the town will result in extensions to its urban area, including provision in adjoining districts. The housing growth between 2006 and 2026 at Redditch should be 6,600 dwellings (proposed total net), 3,300 to be found within Redditch Borough Council's area and a further 3,300 in the neighbouring administrative areas of Bromsgrove and/or Stratford upon Avon Districts.

**West Midlands Regional Centres Study**

2.10 In March 2006, Roger Tym and Partners with King Sturge undertook a strategic assessment of retail, leisure and office facilities in the West Midlands Region on behalf of the Regional Assembly. This study was updated in November 2007 in order to provide indicative floorspace requirements for the period 2021 to 2026. In terms of Redditch, the study estimated that the range of comparison goods sales area requirements up to 2026, before commitments, will be between 33,000 and 41,000 sq m net based on ONS estimates of population growth. Using the higher RSS-based population growth forecasts, the requirement for comparison goods floorspace will be between 31,000 to 39,000 sq m net.

**Worcestershire Structure Plan**

2.11 The Structure Plan was designed to cover the period 1996 – 2011. Under the provision of the Planning and Compulsory Purchase Act 2004, retailing policies (D.31 to D36) of the Structure Plan have been 'saved' until further notice. The retail policies seek to focus new retail development towards town centres but also recognise the importance of shops serving local day-to-day needs in rural settlements.

**Redditch Local Plan**

2.12 The Borough of Redditch Local Plan No.3 was formally adopted on 31st May

2006. Covering the whole of the administrative area of the Borough, Local Plan No.3 sets out detailed land use policies to guide development in Redditch until 2011. The Retail Core and Town Centre are defined on the Proposals Map.

2.13 Retail development is encouraged at two locations in Redditch Town Centre: North West Quadrant and Hewell Road Railway Goods Yard.

2.14 The North West Quadrant is located in the Town Centre to the north west of Church Green. Policy E(TCR).6 encourages a mixed use development on the site. The supporting text to this policy indicates that the site provides the opportunity to undertake major redevelopment to develop a retail food-store or leisure use. There is also the opportunity to undertake small scale redevelopment to create uses which enhance the vitality and viability of the town centre including residential development.

2.15 Hewell Road Railway Goods Yard is located outside of the defined Town Centre. Policy E(TCR).7 indicates that the site is suitable for a number of uses including housing, leisure, retail, office, light industrial, surface car parking and rail infrastructure improvements. However, the site has now been predominantly developed for residential use..

2.16 The Local Plan also identifies nine District Centres. These meet daily shopping needs of the surrounding community.

# 3.0 Current & Emerging Retail & Leisure Trends

**Retail Trends**

3.01 The retail property landscape across the UK has changed significantly over the past 50 years, from post-war redevelopment in town centres, through to the emergence of the retail warehouse park and out-of-town regional shopping malls.

3.02 During this time, the retail and leisure sectors have experienced considerable growth. Spending on retail goods has significantly increased over the past decade, particularly spending on comparison (or non-food) goods. This growth in spending is attributable to a number of factors, including greater disposable income, cheaper prices and new technology.

3.03 The retail market is continually changing as a result of shifts in demographics, increasingly restrictive planning policies and technological advancements, such as e-tailing. These changes are having an impact on the format of retail and leisure floorspace. Research undertaken by British Council of Shopping Centres ('Future of Retail Property, 2006/7') identified that for the period 1999 to 2005 the proportion of new retail space that was developed in UK town centres rose to 35% whilst 65% was not in the centre. This reflects the Government's 'town centres first' approach.

**Current Retail Picture**

3.04 Research undertaken by Colliers CRE (Midsummer Retail Report, June 2007) provides information on recent trends together with forecasts for the future of retailing in the UK.

3.05 The research identifies that although the UK has seen impressive economic growth over the 2006 to mid-2007 period, particularly in the financial and business services sector, economic growth over the latter part of 2007 and during 2008 is expected to decline. Inflation in the price of retail goods is rising, and although retail sales grew in the first quarter of 2007, the rate of growth is lower than previously recorded which may indicate that retail growth has peaked.

3.06 Indeed, high street retailers reported poor trading figures over the 2007 Christmas period, with the worst retail sales growth for three years. Indeed, Debenhams, Next, Marks and Spencer, Currys and J Sainsbury's reporting lower than expected sales figures. This is despite heavy discounting on products over the festive period.

3.07 The slowdown in spending recorded over 2007 comes after five interest rate rises since August 2006, modest income growth and tighter lending conditions, which have impacted on spending. Whilst interest rates were subsequently cut in order to, inter alia, boost confidence in the markets, the so-called credit crunch looms large although the effects of this on retail spending is unclear at the time of writing this Study. Falling clothing and footwear sales, particularly Women's clothing, was felt most acutely by mid-range retailers within designer ranges and value retailers performing well (according to the British Retail Consortium). The homeware and furniture market has also reported poor sales growth in response to the slowdown in the housing market, whilst health and beauty sales slowed dramatically.

3.08 Notwithstanding this, the market for recreational goods including DVDs, CDs, toys, computers and books performed well, with healthy growth aided by supermarket sales over the latter part of 2007.

3.09 Overall, indications from the 2007 Christmas sales period point to a challenging 2008 for retailers, especially in light of falling income growth and a decline in savings. Colliers CRE predict that retailer confidence will erode over 2008 as a result of slowing house prices, which will reduce retail sales growth, and due to increased competition for custom.

**Trends in Comparison Goods Shopping**

3.10 Whilst it is anticipated that over the next ten years the growth in retail spending will slow down, there will continue to be significant growth in retail expenditure, particularly on comparison goods. Research undertaken by BCSC identifies that there will be a need for more than six million square metres (gross) of additional comparison goods floorspace in England and Wales between 2006 and 2015, although this does not take into account developments in the pipeline. This represents an increase of approximately 10% on the 2005 stock.

3.11 There is increasing impetus from retailers to achieve more efficient use of floorspace, particularly given the recent poor performance of many national multiples; many of which have been affected by the significant increase in e-tailing. As a consequence of the recent performance retailers are more reluctant to commit to many schemes in contrast with previous decades. Instead, retailers are being more selective in choosing schemes that are appropriate in terms of location and the types of premises provided. Indeed, retailers are seeking to occupy larger units in order to achieve more efficient use of floorspace and attract shoppers from a wider area. These larger floorplates enable retailers to provide a greater range of goods.

3.12 International market conditions and price deflation in some key sectors means that many high street names are becoming increasingly vulnerable to takeovers. Similarly, due to increased competition there have been a number of high profile losses from the high street, including Littlewoods and Music Zone.

3.13 There will continue to be demand for larger, more modern retail units in the future, although increased sensitivity over future viability will mean a cautious approach to new investment for many key national retailers. Marginal locations within centres will be increasingly rejected. However, many national retailers are now looking at smaller/ lower order centres in order to increase their market share. Many investment decisions will be influenced by the scale of commitment from other retailers; developers will increasingly need to promote large town centre redevelopment schemes if they are to attract high quality retailers.

**Trends in Food Retailing**

3.14 In the aftermath of the growth in the number of edge and out-of-centre large format supermarkets during the 1990s, development of such facilities is now more limited due to stricter planning laws, following the adoption of PPS6, and a lack of suitable sites. As a result, the national multiples in the food retailing sector are finding a range of other measures to improve their market share. These include:

- Offering a wider product range, such as financial and insurance products, petrol and non-food goods;
- Developing a wider range of outlets, for example small-format convenience stores in town centres (e.g. Tesco Express), smaller supermarkets mostly in town centres (e.g. Tesco Metro), superstores (e.g. Tesco) and hypermarkets (e.g. Tesco Extra);
- Extended opening hours;

- Offering cheap products and no-frills service;
- Providing an attractive and powerful brand image; and
- Offering a home delivery service.

3.15 Nevertheless, Verdict (2007) notes that supermarkets increased their combined floorspace by some 294,400 sq m in 2006, which is more than double the amount added in 2005. Tesco has been particularly prolific by aggressively targeting space as a means to boost sales. The closure in 2006 of a planning loophole regarding mezzanine floors led to a rush of floorspace expansions in supermarkets prior to this time. However, Tesco is still expected to increase its UK floorspace by around 6% in 2007/08, with ASDA, Sainsbury's, Morrison's, Waitrose, Marks and Spencer's and Iceland all set to open new stores. Growth at the discounter end of the market is more limited however, and notably in 2007 Kwik Save ceased operating.

3.16 Tesco has traditionally dominated the grocery sector in the UK, and has by far the largest market share. However, given renewed expansion from Sainsbury's, Morrison's and Waitrose stores, Tesco have been made less competitive in bidding for new sites, particularly given that cannibalisation of trade is occurring in many locations due to a proliferation of existing Tesco stores. In light of the changing market conditions, Tesco are looking overseas for ensuring continued growth.

3.17 As a result, whilst supermarkets are still seeking to take more new retail floorspace, in light of national planning policy and the 'town centre first' approach, there is seen to be a general lack of supply of new supermarket sites.

3.18 In terms of products, major areas of growth in the convenience market have been fair trade and organic produce, with customers willing to pay higher prices for food with the expectation of better quality produce and more ethical practices in production and supply.

3.19 The number of forecourt convenience stores, once popular with consumers, is now declining due to static fuel sales and high operating costs. Although there are currently around 10,400 forecourt convenience stores in the UK this forecast to fall to around 8,500 by 2010 (UK Forecourt Retailing, IGD, 2005). Notwithstanding this the average floorspace of forecourt stores is increasing as all the major retailers continue to open and expand such operations to supplement their existing store networks.

3.20 Farmers markets and specialist firms offering a home delivery service, for example organic food, are small-scale operations that are growing in popularity.

**In Town Investment and Prime Rents**

3.21 Colliers CRE highlight that August 2006 saw a cooling of demand for town centre representation in the retail market. Over the 2006-2007 period a lack of meaningful activity was recorded, with investors deterred by interest rate rise, retail failures and poor high street rental growth, despite retail yields over this period declining, suggesting improved investor confidence. Indeed, Property Data show that the volume of deals was down by 60% in 2006 compared to 2005.

3.22 Spring 2007 has seen renewed interest in retail propriety investment however, although this is still lower than in previous years. Although investors are still active in acquiring property, this has been on a more selective basis with the variety of bidders being reduced. Investors are concentrating on predominantly substantial, prime, well located assets in major city/town centres and in Central London. This may indicate a willingness to take a longer term view on the high street, rather than a demonstration of confidence in the current market.

3.23 Over the 12 months to May 2007, the prime Zone A rental level increased recorded in the UK was the smallest since the 2000/2001 period. Once inflation is striped out of this change, prime Zone A rents in real terms are seen to have actually fallen over the twelve months to May 2007. Nationally, there is differentiation in the performance of Regions, with five Regions (including London and the South West) recording static or increased prime rents, and seven regions recording a fall in their rental growth rate (including Yorkshire and the Humber, the West Midlands and the North West and Merseyside). Notably, both the North West and Merseyside and Yorkshire and The Humber both underperformed against the UK national average in terms of rental level gains.

**Out of Centre**

3.24 Colliers CRE note that demand for out-of-centre representation is relatively static, with some retailers including TK Maxx, Asda Living and Tesco Home Plus actively seeking to expand their out-of-centre floorspace and others, including

Focus, MFI and Currys either disposing of stores or downsizing their operations.

3.25 In terms of proposals in the development pipeline, the majority of consents for out-of-centre retail floorspace are for bulky goods stores. However, there has been a decline in out-of-centre proposals in the development pipeline during 2007. Despite this, Colliers CRE predict that the development of out-of-centre floorspace development will increase compared to 2007, albeit by a modest amount.

**Shopping Centre Development**

3.26 Research undertaken by Colliers CRE recognises that within town centres, supply outstrips demand. This is particularly prevalent in terms of lettings within shopping centres. As a result, Colliers CRE expect future shopping centre schemes to be pre-let by only 70% to 80%. This compares to a number of similar schemes being 100% pre-let in previous years. This is symptomatic of a reluctance of retailers to commit to schemes. This presents challenges for schemes due to open in the next few years, and it is anticipated that the timeframe for developing many shopping centre schemes will be pushed back.

3.27 The research also identifies that retailers are reluctant to commit to schemes before they are constructed due to difficult trading positions and a large amount of supply. Retailers are able to 'cherry-pick' the best schemes to which they commit, and the largest anchor stores in particular, including Debenhams, House of Frasier and Marks and Spencer, are able to negotiate very favourable letting terms.

3.28 Town centre shopping centre schemes that will be successful in the future are considered to be those which benefit from good design and good location. Car parking facilities are also a distinct advantage. It is this type of development that will be able to compete with out-of-centre shopping facilities, which whilst more convenient for many consumers are considered not to offer an attractive shopping experience.

**Growth in E-tailing ('E-commerce')**

3.29 Many consumers who previously shopped in town centres and at retail parks are now using the internet for some of their purchases. This trend is set to continue, although the exact impact that e-commerce will have on the high street has yet to be fully established. However, the rise in the UK in recent years of e-commerce has impacted upon retailers, developers and investors alike. As access to the internet/online shopping continues to grow through digital televisions and mobile phones, proportionally less money is anticipated to be spent in the high street or at retail parks.

3.30 The growth in use of the internet as a sales medium has been enabled by increasing access to the internet by households. The proportion of households with access to the internet is expected to increase further over the coming years. This has supported the strong growth recorded, together with improved consumer confidence in the security of online payment, and heavy demand for expensive electrical products available online.

3.31 In 2006, online sales of £10.9 billion were recorded in the UK which represents a per annum growth of 33.4% (Colliers CRE). More than a third (36.3%) of UK consumers now purchases goods over the internet. Moreover, the average spend per customer is increasing. The online electrical goods sector represents the largest amount of expenditure, followed by online food shopping.

3.32 More recent research conducted by the Interactive Media in Retail Group and analysts Capgemini indicates that internet shopping accounted for 15p of every £1 of retail spending during 2007 This equates to some £46.6 billion of expenditure. However, this compares to the British Retail Consortium's data identifying that online sales accounted for 6% of retail spending during 2007. Despite these differing results, internet spend during 2007 is significantly higher than that recorded for 2006.

3.33 The forecast for online sales suggests that this sector could more than double over the next five years. Furthermore, online sales are expected to account for an increasing share of all retail goods sales, with a market share predicted of a little under 10% in 2011. Against this, forecasts by Experian indicate that whilst growth in this sector will be rapid, it will tail-off and stabilise not far beyond 10%.

3.34 The success of internet shopping is having an impact upon traditional high streets, in light of increased competition and lower prices. Consequently, there is a possibility that online retailing will put some pressure on retail rental growth over the next five to ten years, but is unlikely to impact on capital values. Research by BCSC identifies that 'large' and 'very large' shopping centres (of over 40,000 sq

m) are deemed almost immune from the impact of online shopping as they offer the complete 'day out'. Although as the size of the shopping centres decreases, it is more likely that there will be greater adverse effects. Within small shopping centres (sized between 5,000 – 20,000 sq m) the growth of online shopping could reduce turnover notwithstanding any growth in disposable income.

3.35 Furthermore, there is some evidence to suggest that the increase in e-commerce is impacting not just on high street sales, but also on the inclination of retailers to expand their 'bricks and mortar' outlets (BCSC, 2006). Despite this, retailers are optimistic, as they envisage a continued demand for physical stores and, for most, store sizes are likely to remain the same. Significantly, more retailers ranked physical stores first, ahead of all other current channels of retail distribution, and this is a pattern that they envisaged continuing. Retailers see e-tailing as another channel of distribution (BCSC, 2006).

3.36 As a consequence of the likely increase in e-tailing, retailers will increasingly have to adapt their stores to create more experience led environments. However, the increase in 'virtual' floorspace could result in a decrease in the level of innovation and number of new concepts and formats in the high street and in shopping centres.

3.37 Despite all these different assumptions with regard to the future affect of online shopping, it is considered that e-tailing will not replace the shopping experience as shopping is a social activity. Online shopping is very much seen as a complementary tool to support retail sales from physical destinations (BCSC, 2006). For successful retailers, online selling provides an additional route to the market. Online retailers benefit from demand generated through physical channels whilst high-street outlets can benefit from reaching a wider customer base through the internet

3.38 In response to increased competition from the internet, high street retailers have improved their online services. The future for online retailing will mean that retailers without a website will lose out to competitors who have one. Crucially, retailers which combine a strong high-street offer with a well-represented and closely related e-tailing offer will have a positive outlook.

# 4.0 Existing Shopping Facilities

**Introduction**

4.01 This section of the study provides an overview of shopping facilities available to residents of Redditch Borough and the wider study area. Firstly, this section examines the sub-regional shopping hierarchy in order to understand the position of Redditch town centre relative to competing centres further afield. Having established the context there follows an audit of the town centre and district centres within the Borough. The assessment of shopping facilities in this section is based predominantly on WYG fieldwork, information from the relevant local authorities, established data sources (including Management Horizons, the Valuation Office, and Experian), and the results of specially commissioned household and on-street surveys described below.

**Original Research**

4.02 As part of this study, specifically commissioned survey research has provided important information on consumer preferences in relation to where people live and shop, and this has been fundamental in informing a study that will effectively identify the likely capacity for future floorspace within the Borough. The questionnaires for the surveys were designed to gain information on shopping patterns which would not only inform the assessment of retail expenditure capacity but also provide valuable information on the views of visitors to Redditch town centre.

4.03 WYG commissioned specialist market researchers (NEMS Market Research Limited) to undertake empirical research, which comprised a household telephone survey and an on-street survey undertaken in Redditch town centre.

***Household Telephone Survey***

4.04 In April and May 2008 a survey of 1,017 households was undertaken within a defined Study Area, which comprised the whole of Redditch Borough and extended into the neighbouring local authority areas of Stratford on Avon, Bromsgrove and Wychavon. The plan at Appendix A indicates the extent of the defined Study Area.

4.05 The survey area was broken down into 8 zones and was based on postcode sectors (e.g. B98 7):

| | |
|---|---|
| Zone 1 | B98 0, 7, 8 and 9 |
| Zone 2 | B80 7 |
| Zone 3 | B97 4, 5 and 6 |
| Zone 4 | B96 6 |
| Zone 5 | B60 2, 3 and 4; B61 0, 7 and 8 |
| Zone 6 | B60 1; B45 8; B48 7 |
| Zone 7 | B95 5; B94 5 |
| Zone 8 | B49 5 and 6; B95 6 + |

**On-Street Survey**

4.06 In addition, an on-street survey was undertaken, between Monday 21 April and Saturday 26 April 2008, in Redditch town centre in order to identify the views of existing shoppers in the town centre, including their perception of the town centre and how it could be improved. A total of 200 surveys were conducted in various locations around the town centre.

4.07 The results of both surveys are referred to in the assessment of existing shopping facilities described below. The survey questionnaire is contained at Appendices B & C.

**Sub Regional Shopping Hierarchy**

4.08 In terms of retailing, Management Horizons Europe survey shopping centres in the UK and rank them according to their relative retail strength and the assessed level of vitality and viability. The factors influencing a centre's position in the hierarchy include the number of national multiple retailers present in the centre, the number of key attractors (such as John Lewis or Marks and Spencer), the total retail floorspace available, and the level of vacant floorspace.

4.09 Figure 4.1 shows the position of Redditch in the national rankings and the main competing centres in the wider sub-region.

**Figure 4.1: Shopping Provision in the Sub-Region**

| Centre | MHE Rank | Distance from Redditch (km)* |
|---|---|---|
| Birmingham | 3 | 20 |
| Solihull | 49 | 16 |
| Coventry | 60 | 31 |
| Worcester | 62 | 20 |
| Kidderminster | 161 | 23 |
| Stratford-upon-Avon | 171 | 20 |
| **Redditch** | **183** | _ |
| Evesham | 322 | 23 |
| Stourbridge | 361 | 21 |
| Bromsgrove | 446 | 8 |
| Droitwich Spa | 669 | 15 |
| Kenilworth | 896 | 25 |
| Warwick | 943 | 25 |
| Stourport-on-Severn | 1066 | 23 |
| Pershore | 2467 | 23 |
| Alcester | 2608 | 11 |

**Source: Management Horizons Europe 2008. * Straight line distance**

4.10 Redditch is ranked 183rd. In terms of competing centres in and around the study area which are roughly equivalent in size as Redditch, only Stratford-upon-Avon, Kidderminster and Worcester are higher in the rankings.

4.11 Shopping and leisure uses in Redditch town centre are primarily contained within the Kingfisher Shopping Centre and the area around St Stephens Church.

4.12 The Kingfisher Centre is an extensive internal mall containing a range of national multiple retailers. Multi storey car parks are located around the edge of the complex.

4.13 The external shopping area is located immediately to the north of the Kingfisher Centre and is arranged around Church Green. From this point the town centre extends in an easterly direction along Alcester Street and in a westerly direction down Unicorn Hill. Other town centre uses, including government offices, citizens advice bureau, job centre, emergency services, college and library are located along the northern and eastern periphery of the town centre.

**Composition**

4.14 Figure 4.2 below shows the composition of Redditch town centre by the number of units and floorspace occupied by each retail and retail service category. The data is collected regularly by Experian Goad and the most recent survey was undertaken in September 2007. As part of this Retail Study, the data was updated in May 2008. Both sets of results can be compared to historical data from 1997 to assess the changes in composition of the town centre over the last decade. A plan showing the area surveyed by Experian is contained in Appendix D.

**Figure 4.2: Redditch Town Centre Retail Composition and Floorspace 1997 – 2008.**

| No of units | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | 1997 | | 2007 | | 2008 | | UK No. Units Average (%) | UK Floorspace Average (%) |
| Unit Type | No. of units | Sq m. Gross | No. of units | Sq m. Gross | No. of units | Sq m. Gross | No. of units | Sq m. Gross |
| Convenience | 12 (5%) | 4,218 (8%) | 15 (6%) | 1,440 (2%) | 17 (7%) | 1,560 (2%) | 9% | 17% |
| Comparison | 99 (43%) | 30,825 (57%) | 109 (46%) | 46,450 (69%) | 112 (47%) | 48,130 (71%) | 45% | 51% |
| Service | 50 (22%) | 9,504 (18%) | 71 (30%) | 9,820 (15%) | 75 (32%) | 10,140 (15%) | 33% | 22% |
| Miscellaneous | 5 (2%) | 418 (1%) | 6 (3%) | 810 (1%) | 6 (3%) | 810 (1%) | 2% | 1% |
| Vacant | 62 (27%) | 9,197 (17%) | 36 (15%) | 8,530 (13%) | 28 (12%) | 6,770 (10%) | 11% | 9% |
| Total | 228 | 54,162 | 237 | 67,050 | 238 | 67,410 | 100% | 100% |

**Source: Experian (1997); Experian (2007); White Young Green Planning (2008)**
**Figures may not add due to rounding**
**Miscellaneous category comprises of post offices, employment agencies and information centres**.
**UK average figures are for 2008**

4.15 The overall number of units available in Redditch town centre is 238, relatively unchanged from 1997 (228). However, the overall floorspace available has increased by around 13,000 sq metres over this period which has included the Debenhams extension in the Kingfisher Centre.

4.16 There are 17 units in the town centre dedicated to the sale of convenience goods and these units occupy just over 1,500 sq.m.gross floorspace. The largest single convenience store is Farmfoods located on the lower ground floor of the Kingfisher Centre. Marks and Spencer, although predominantly a comparison retailer, supplements the convenience offer with a foodhall. Smaller units are occupied by off licences, general stores and newsagents. There are just two bakers and one butcher but no greengrocer or fishmonger in the town centre.

4.17 In terms of trends Figure 4.2 shows that the number of convenience units has risen from 12 to 17. However, the most striking change is the 2,500 sq metre fall in convenience goods floorspace. This could be partially explained by the loss of Tescos in the Kingfisher Centre in 2000. This unit has now been subdivided into 10 no. comparison units.

4.18 The percentage of floorspace devoted to convenience retailing is 2% compared to the national average of 17% indicating that the food offer in Redditch town centre is comparatively poor. It should be noted that the on-street survey results revealed that 20% of respondents considered that 'better foodstore provision' would improve Redditch town centre and make it more attractive. In addition, the on-street survey revealed that only 7% of visitors were primarily in the town centre shopping for food and groceries.

4.19 The number of comparison shops in the centre has increased from 99 to 112 between 1997 and 2008. In addition comparison goods floorspace has dramatically increased by approximately 17,000 sq metres, an increase of over 54% in 11 years. This represents a substantial 70% of the total available floorspace. This is considerably higher than national floorspace average of 51%. The on-street survey revealed that 28% of visitors were primarily in the town centre to shop for clothes / shoes.

4.20 The service sector has grown considerably over the period 1997 to 2008, a feature common in town centres across the UK. 25 additional units have been occupied by the service sector taking the total number to 75 (32% of all units). Service units include hot foods take aways, restaurants, pawnbrokers, hairdressers, banks and a proliferation of estate agents. The on-street survey revealed that 17% of visitors were primarily in the town centre to visit a bank or building society.

4.21 Vacancies have fallen significantly from 62 to 28 units. Falling vacancy rates is a trend across town centres in the UK over this period. In spite of this, the current vacancy rate of 12% is just above the national average of 11%.

4.22 In reference to the high vacancy rate in 2007, The Kingfisher Centre Vision & Strategy produced by Taylor Young in 2000 for the owners at the time, Thornfield, identified that vacancy rates were high. At the time of their study 58 units were vacant (indicating that the number of units had fallen from 62 to 58 between 1997 and 2000). The majority of these were located in the Kingfisher Centre. The study concluded that the vacancy rate was high as a result of low footfall and the poor quality environment within the Kingfisher Centre.

4.23 The redevelopment of Royal Square in 2001/ 2002 to create a new Debenhams store may also explain the drop in vacancy rates between 1997 and 2008. From surveys carried out by MVM Planning (now White Young Green Planning) this corner of the Kingfisher Centre previously contained an average of 12 vacant units between January 1999 and April 2000. Excluding these from the 1997 figure reduces the number of vacancies to 50, which results in a lower figure of 22% compared to the national figure of 14%.

4.24 Our vacancy findings are corroborated by information provided by the owners of the Kingfisher Centre (Scottish Widows). It is their view that vacancy levels have decreased in recent years. Moreover, the current levels of vacancies do not give rise to any major concerns in respect of the vitality and viability of the Kingfisher Centre.

4.25 The retail offer in the town centre is enhanced by the presence of market stalls. At the time of the survey the following goods were available: diy hardware; batteries and electrical items; carpets; bed linen; mobile phone accessories; cosmetics; bread; jewellery; clothes; bags and 2 No. green grocers. The town centre also has a closed market area, located to the rear of Debenhams. We understand, however, that this facility has not been utilised by traders for 18 months as they prefer to locate in a more central position along Market Place and Alcester Street.

**Retail Character Areas**

4.26 The town centre contains the following five distinct retail areas: the Kingfisher Shopping Centre; Evesham Street and Market Place; Alcester Street and Church Green East to; Church Green West, Prospect Hill, Church Road and William Street to the north west of St Stephens Church; and Unicorn and Bates Hill to the west.

4.27 <u>Kingfisher Shopping Centre</u> – This consists of large shopping mall. The majority of units are located on one level, but the centre also benefits from a smaller first floor (containing a cinema) and a lower ground (providing access to the bus station situated beneath).

4.28 The centre has a contemporary, airy internal environment which is clean and well maintained. It contains a significant number of 'mainstream' national multiple retailers which you would expect to find in most of the largest 100 town centres in the UK. These include Marks & Spencer, BHS, Next, H&M, Clinton Cards, HMV , Debenhams, WHSmith, H Samuel, Superdrug, River Island, Boots, Peacocks, Argos, T L Hughes and Wilkinson.

4.29 There are also a number of cafes / coffee houses such as Costa Coffee, Esquires Coffee Shop and Druckers Café which, in combination with a McDonalds, act as attractors.

4.30 It is important to recognise that the Kingfisher Centre enables a large number of national retailers to locate in a town which given its size would not normally attract such a wide and diverse retail offer. In combination with the large multi storey car parks located around the edge of the centre, it provides a significant retail attraction for the hinterland of Redditch. The attraction of the Kingfisher Centre is demonstrated by the highest footfall in the town centre (recorded at the entrance to the shopping centre).

4.31 <u>Evesham Street & Market Place</u> – This area extends from the northern entrance to the Kingfisher Centre to Church Green and along Market Place in a south easterly direction. It is located within the Church Green Conservation Area.

4.32 The east side of Evesham Street has an historic character derived from the narrowness of the street, shop fronts with awnings and the architectural features of the buildings consisting of bay windows at first floor height with white glazing bars set against red brick. The range of retail offer includes mens and ladies wear, butchers, mobile phone sales and a toy shop. The corner unit contains a baker with an outdoor seating area. The west side of Evesham Street contains 3 No. banks and a building society. These are located within a modern 1960s/ 1970s unit. In spite of this, the historic character of the area is maintained by the use of colonnades at ground floor level.

4.33 The Market Place fronts onto Church Green. Moving away from the Kingfisher centre the first set of units are characterised by narrow frontages. These contain charity shops, childrens wear, and an insurance office. Moving in a south easterly direction the units become larger and contain a DIY store, solicitors and a large vacant public house.

4.34 The environmental quality of the area is enhanced by the historic nature of the buildings and the pedestrianised frontages which enable visitors to shop and relax without the fear of traffic. Footfall at the Market Place was the second highest in the town centre, with activity almost identical to that of the Kingfisher Centre.

4.35 <u>Alcester Street and Church Green East –</u> This area comprises of a continuous frontage from the southeast corner to the northern periphery of town centre, albeit occasionally dissected by footpaths leading through to Wellington Street and Queen Street.

4.36 The south side of Alcester Street contains two large government buildings together with Barclays Bank and a Post Office.

4.37 The retail offer on Alcester Street is fairly limited consisting of just one charity shop and newsagents, both of which are located at the upper end of Alcester Street close to the main shopping core of the town centre.

4.38 At the southern extreme of Alcester Street is a theatre and three large pubs, operated by national pub chains. e.g. Wetherspoons. There is also one large vacant unit at the lower end of Alcester Street adjacent to the Palace Theatre. The lack of retail offer in this area manifests itself in a low footfall count which was the lowest in the town centre: activity was 50% lower than the levels recorded at the Kingfisher Centre. However, a positive aspect of the area is the high quality environment. A line of semi mature trees runs down the middle of the street and the pedestrianised surface is clean and well maintained. There are no signs of graffiti or litter. In combination with raised landscaped beds and large three-tier planters and hanging baskets the environment is pleasant and attractive. At the time of writing this study, further environmental enhancement works were being undertaken.

4.39 The units on Church Green East are located in close proximity to St Stephens church yard, which contains attractive landscaped areas with benches situated beneath semi mature trees. In combination with the historic buildings in this part of the town, which provide visual interest, the environmental quality of the area is high.

4.40 The majority of units on Church Green East consist of service units with a proliferation of estate agents. Other service uses include a bank and two hairdressers. There are also two employment agencies. Footfall on Church Green East was moderate with only Alcester Street recording a lower figure.

4.41 Church Green West, Prospect Hill & Church Road – This is the area located to the west of the St Stephens Church and includes Prospect Hill, which descends in a northerly direction away from the town centre.

4.42 The eastern side of Prospect Hill is dominated by a large office block. This contains a government building, citizens advice bureau and a job centre. The western side of Prospect Hill contains a large health centre which occupies the majority of the street frontage. Other uses include an office, dental surgery, estate agent, a chine restaurant and a further large government building which is accessed from a private car park. Owing to the large government buildings this area can be described as a municipal quarter.

4.43 Church Road has the characteristics of a typical back street located off the main retail area. It contains a government building, employment agency, solicitors, office and a nightclub. It terminates in a large bus depot, surgery and multi storey car park. There are no retail units within Church Road.

4.44 Adelaide and William Street are located to the rear of Church Green West. This area contains a surgery, pharmacy and undertakers.

4.45 Church Green West extends from the junction of Church Road towards Bates Hill. It contains a full mix of uses including a convenience store, employment agency, banks and estate agents and a pharmacy. The buildings in this area display a mix of architectural styles (art deco…) adding to the character of the area. Footfall in this area of the town was moderate, recording 25% less activity than the Kingfisher Centre.

4.46 Unicorn Hill, Bates Hill  Hewell Road – This is an area extending away from the core of the town centre in a westerly direction. The majority of units on Unicorn Hill fall within the service category and include an insurance broker, pawnbroker, hairdressers, a pub and numerous hot food take away outlets. Given the number of take away outlets, two pubs and the ease of highway access (being non-pedestrianised) it is considered that this area of the town receives a high level of activity in the evenings.

4.47 A triangular area of land is situated between Unicorn Hill and Bates Hill. This area contains six units, three of which are vacant and in poor state of repair. In combination with the ad hoc parking arrangement at the front of the site (facing onto Unicorn Hill) the environmental quality of the area is very poor. Save for the Chicago Rock Café, which occupies a large three storey art deco building, the visual appearance of the area is in need of investment and attention.

4.48 Bates Hill is an off-shoot of Unicorn Hill and contains just three units, namely an Indian takeaway and two vacant units. Given its position off-the-beaten-track it does not contribute significantly to retail offer of the town centre.

4.49 Hewell Road is located at the bottom of Unicorn Hill on the extreme western edge of the town centre. It provides direct access to Redditch Train Station and the Bus Station. The retail offer consists of hot food take away and a pub. To gain access to this area, visitors to Redditch must pass under the Redditch Ringway. This causes a lack of continuous retail frontage. As a result the area has a detached and separated relationship with the town centre.

**Diversity of Town Centre Uses**

4.50 There are many other uses in and around the town centre which attract visitors to Redditch and contribute towards the vitality of the centre. These include a library, churches, businesses including solicitors and accountants, a college and Local Government offices including the offices of Redditch Borough Council.

4.51 The on-street survey indicated that respondents who were in the town centre had the following primary reasons for visiting:

| | |
|---|---|
| Clothes / shoe shopping | 28% |
| Food and grocery shopping | 7% |
| Bank/building society | 17% |
| Work/School/College | 14% |
| Social / leisure activities | 12% |

4.52 In addition, respondents indicated a wide variety of secondary reasons for visiting including:

| | |
|---|---|
| Clothes / shoe shopping | 65% |
| Food and grocery shopping | 25% |
| Bank/building society | 39% |
| Work/School/College | 28% |
| Social / leisure activities | 29% |
| Café / restaurant / pub | 16% |
| Doctor / dentist | 8% |
| No other reason | 3% |

**Vacancy Rates**

4.53 Figure 4.2 (above) sets out the number of vacant units and floorspace in Redditch town centre. As previously noted, the number of vacancies has fallen significantly since 1997 (from 62 to 29) as well as the amount of vacant floorspace. Scottish Widows (owners of the Kingfisher Centre) have confirmed that vacancy levels have dropped in recent years. Moreover, the current levels of vacancies do not give rise to any major concerns in respect of the vitality and viability of the Kingfisher Centre.

4.54 In spite of this, the current vacancy rate of 12% is above the national average of 9%.

4.55 Vacant units are not concentrated in one particular area but dispersed across the town centre. The only exception to this is a triangular area of land between Bates Hill and Unicorn Hill. This contains a continuous run of thee vacant units which in combination with their poor physical state reduces the vitality and viability of this area of the town centre.

**Retailer Requirements**

4.56 Focus Property Intelligence provide details of all retailers seeking new premises in a particular centre, this information offers a useful source of anticipated demand in an area. However, these sources should be treated with caution, given that certain retailers may seek floorspace in Worcestershire in general, and will publish a requirement for every major town in the whole of the County until one is secured. On the other hand, not all retailers reveal their requirements through the Focus database and others may only express an interest in a town if a suitable development proposal emerges. Therefore, as long as the limitations to the data are acknowledged, the Focus database does provide a useful source of information.

*4.57* 33 operators are currently seeking units in Redditch and comprise of the following:

| | |
|---|---|
| Pizza Express/ASK/Zizzi | Acorns Children's Hospice Trading Ltd |
| UK Barber Shops Limited | Bonita |
| Liquid | Greens Health & Fitness |
| Chicago Rock Cafe Ltd | A1 Retailer |
| 99p Stores Ltd | Machine Mart Limited |
| United Carpets and Beds (2 requirements) | blue cross |
| Fuel Juice Bars | Profile Clothing Ltd |
| Marstons Plc | Argos Limited |
| UC Holdings | B&M Retail |
| Caffe Nero | tReds |
| Shaw Trust | Greggs plc |
| Vets4Pets Ltd | JD Sports |
| Hootys | Hawkin's Bazaar |
| Homeflair | Textiles Direct |
| The Bakers Oven | Millies Cookies |
| Frankie & Benny's | |

**Commercial Yields**

4.58 The yields expressed in Figure 4.3 below are ‘all risk yields’ calculated by dividing the annual rent, as though it had been received as a single sum at the year end, by the capital value or sale price of the property. The ‘all risk yield’ is a simple benchmark which the property market uses to assess the comparative attractiveness of different shopping centres. It is the ratio of rental income to capital value and is expressed in terms of the open market rent of a property as a percentage of the capital value.

4.59 As a measure of retail viability, yields are a valuable indictor, but one that needs to be used with care. The level of yield on its own is of less value than in comparison with other yields at different points in time and in different locations. Yields measured consistently over time can give an indication of the direction in which a particular town centre is moving, although yields also reflect the state of the economy in general and the attraction of the property market compared to other forms of investment.

4.60 This trend can be compared with national levels of yields and with those towns of similar size and type, or with neighbouring and competing towns. A comparative analysis of this type, conducted on a regular basis, can give an indication of how the viability of retailing in a town centre is changing.

**Figure 4.3: Commercial Yields 2008**

| Centre | 1/4/01 | 1/4/02 | 1/4/03 | 1/1/04 | 1/1/05 | 1/1/06 | 1/1/07 | 1/1/08 |
|---|---|---|---|---|---|---|---|---|
| Worcester | 4.75 | 4.75 | 4.75 | 4.75 | 4.75 | 4.75 | 4.75 | 4.75 |
| Hereford | 5.5 | 5.5 | 5.5 | 5.5 | 5.5 | 5.5 | 5.25 | 5.25 |
| **Redditch** | **5.25** | **5.25** | **5.25** | **5.25** | **5.25** | **5.25** | **5.25** | **5.25** |
| Evesham | 7.5 | 7.5 | 7.5 | 7.5 | 7.5 | 7.5 | 7.5 | 7.5 |
| Great Malvern | 8.5 | 7.5 | 7.5 | 7.5 | 7.5 | 7.5 | 7.5 | 7.5 |
| Ross on Wye | 8 | 8 | 8 | 8 | 8 | 7.5 | 7.5 | 7.5 |
| Droitwich | 7.5 | 7.5 | 7.5 | 7.5 | 7.5 | 7.5 | 7.5 | 7.5 |
| Leominster | 10 | >=10 | >=10 | >=10 | >=10 | >=10 | >=10 | >=10 |
| Ledbury | 9 | 9 | 9 | 9 | 9 | 9 | 9 | 9 |
| Solihull | 5 | 5 | 5 | 5 | 5 | 4.75 | 4.75 | 5 |
| Leamington Spa | 5.5 | 5.5 | 5.5 | 5.5 | 5.5 | 5.25 | 5 | 5.25 |
| Stratford-upon-Avon | 5.25 | 5.5 | 5.5 | 5.5 | 5.5 | 5.25 | 5.25 | 5.5 |
| Warwick | 9.5 | 9.5 | 9.5 | 9.5 | 8 | 7.75 | 7 | 7 |
| Kenilworth | 8.75 | 8.75 | 8.75 | 8.75 | 8 | 7.75 | 7 | 7 |
| Stourbridge | 9 | 9 | 9 | 9 | 9 | 8 | 8 | 6 |
| Dudley | 9 | 8.75 | 8.75 | 8.75 | 8.75 | 8.5 | 8 | 6 |
| Kidderminster | 8 | 7.75 | 7.5 | 7.5 | 7.5 | 7.5 | 6 | 5.5 |
| Bromsgrove | 8 | 8 | 8 | 8 | 8 | 7 | 6 | 5.5 |
| Halesowen | 8.5 | 8 | 8.25 | 8.25 | 8.25 | 8.25 | 8.25 | 7 |
| Stourport on Severn | 9.5 | 9.25 | 9.25 | 9.25 | 9.25 | 8.5 | 8 | 7 |
| Birmingham Central | 5 | 5 | 4.75 | 5 | 5 | 5 | 4.75 | 4.75 |
| Coventry | 5.25 | 5.25 | 5.25 | 5.25 | 5.25 | 5 | 5 | 5.25 |

4.61 Figure 4.3 above illustrates that Redditch's yield has remained constant over the past 7 years at 5.25%. This is one of the lowest in the area and only out performed by Worcester. Moreover, it is on a par with Coventry. Other centres in the surrounding area have much higher yields (Evesham, Bromsgrove, Kidderminster and Droitwich all have yields of 5.5%). In terms of other competing centres which draw trade from the Study Area, Stratford-upon-Avon has a yield of 5.5% (recently deteriorated) and Warwick 7% (steadily improving).

4.62 On the basis of yields, it appears that Redditch is regarded as safer investment location than many other centres in the surrounding area and has remained so over recent years. .

**Pedestrian Flows**

4.63 Pedestrian counts were conducted at 5 points within Redditch town centre by NEMS Market Research Ltd during April 2008. The methodology and full results are contained in Appendix C. The heaviest footfall was observed at the entrance to the Kingfisher Centre (total count 1408). The second highest level was recorded at the Market Place with activity almost identical to that of the Kingfisher Centre (total count 1370). Pedestrian flows decreased away from the core of the town centre. Church Green West, to the west of St Stephens Church, recorded a total footfall of 1083. This represents 75% of the activity experienced at the Kingfisher Centre. Towards the northern periphery of the town centre, on Church Green East, footfall drops to just 890, representing 63% of the activity experienced at the Kingfisher Centre. The south east corner of the town centre, Alcester Street, recoded the lowest level of foot fall (710). This represents 50% of the activity recorded at the Kingfisher Centre.

4.64 Information provided by the owners of the Kingfisher Centre (Scottish Widows) confirms that since 2002 there has been a broad increase in the level of footfall, albeit with a slight drop between 2005 to 2006. The most recent data indicates an increase in the number of customers visiting the centre for each month of 2008 compared to 2007 (to August); equating to a 5.8% increase overall..

**Environmental Quality**

4.65 The Kingfisher Centre offers an attractive, contemporary and clean shopping environment. It has an airy internal environment which is enhanced by the passage of natural light, particularly at the northern end of Walford Walk and the central Worcester Square.

4.66 Evesham Street and Market Place benefit from historic front elevations which enhance the environmental quality of the area. Buildings are well maintained and provide a contrast to the modern shopping environment of the Kingfisher Centre.

4.67 The area around Church Green East fronts onto a series of formal gardens which surround St Stephens Church. The gardens contain benches set beneath small trees. There is also a bandstand and fountain. These features and the level of upkeep create a pleasant backdrop to the units both of Church Green East and Church Green West.

4.68 Despite the presence of two large vacant units in the south east corner of the town centre on Alcester Street, the environmental quality of the area is still high as a result of large three tier planters positioned around the base of semi mature street trees, well kept raised landscape beds, the lack of graffiti and litter and well maintained pedestrianised hard surfaces.

4.69 The environmental quality deteriorates, however, on the western extremes of the town centre, particularly at the junction of Unicorn Hill and Bates Hill. This area contains a significant number of vacant units which are in a poor state of repair. This notably harms the character and appearance of the area.

4.70 The household survey indicates that the majority of respondents in the study area (61%) considered the environmental quality in Redditch town centre to be ‘about the same’ as other centres. 17.5% felt it was better and 19% felt it was worse than other centres.

4.71 The on-street survey revealed that 30% of respondents had a positive perception of the shopping environment in Redditch, with only 19% expressing a negative opinion.

4.72 In terms of cleanliness respondents rated the town centre much higher with 33% of respondents indicating Redditch was better than compared to other town centres. The positive response to Redditch town centre was reinforced by the limited number of people (3%) who indicated in a separate question that ‘improved cleanliness’ would enhance Redditch town centre and make it more attractive. In addition the household survey revealed that just 2% of respondents chose not to shop in Redditch as a result of cleanliness.

**Accessibility and Movement**

4.73 The on-street survey revealed the following methods of transport were used to access Redditch Town Centre.

| | |
|---|---|
| Car / van (or passenger in a car) | 40% |
| Bus, minibus or coach | 39% |
| Walk | 16% |
| Train | 4% |
| Bicycle | 1% |
| Motorcycle | 1% |
| Taxi | 1% |

4.74 The high number of people using the bus to access the town centre is noteworthy (39%). The bus station is located beneath the Kingfisher Centre and as a result is protected from the elements. It contains 10 bus stops located around a one way system. Access to the Kingfisher Centre is gained via escalators. At the base of the escalators is a coffee shop providing an opportunity for bus users to relax before boarding buses or commencing their shopping. At the time of the White Young Green Planning survey the station was relatively busy.

4.75 16% of visitors walk into Redditch Town Centre indicating a good level of accessibility to the neighbouring residential areas.

4.76 The train station is a key transport facility in Redditch. Whilst it is located at the bottom of Unicorn Hill and therefore physically detached from the town centre, it is less than 250 metres walking distance from the prime retail core of the town. Operated by London Midland, trains leave every 30 minutes and provide a direct service to Birmingham New Street. This journey takes approximately 36 minutes and the service operates from 06:27 until 22:57. This facility greatly improves the vitality and viability of the centre by enabling visitors to gain swift and direct access into the town centre.

4.77 Despite the high levels of non car transport, only 16% rated Redditch as being better than other centres in terms of accessibility by public transport. Conversely, 38% of respondents considered Redditch to be worse than other centres.

4.78 The following car parks are located around the periphery of the town centre:

| | |
|---|---|
| Multi Storey No. 1 | 387 (actual) |
| Multi Storey No. 2 | 956 (actual) |
| Multi Storey No.3 | 656 (actual) |
| Multi storey No.4 | 585 (actual) |
| Multi storey No. 7 | 110 (estimated) |
| Victoria Street | 140 (estimated) |
| Train Station Car Park | 150 (estimated) |
| Hewell Road | 26 (actual) |
| **TOTAL** | **3010 spaces** |

4.79 Over 55% of respondents parked within multi-storey car park No.2, No. 3 or No.4. These are located immediately on the south of the Kingfisher Centre.

4.80 The on-street survey revealed that only 12% of respondents struggled to find parking space. However, in response to a separate question, 28% of respondents still indicated that car parking provision in Redditch was worse when compared to other centres.

4.81 In terms of car parking prices the majority of respondents (42%) expressed the opinion that Redditch was worse than other centres. This indicates that Redditch is perceived as an expensive place to park. By comparison just 13% felt parking prices in the town were better than other centres.

4.82 Ease of movement around the centre is generally good. It is a relatively compact centre, being located within the Kingfisher Centre and around Church Green, and the vast majority is pedestrianised. The on-street survey results reveal that the majority (61%) of respondents consider the layout to be on a par with other centres. 25% consider it was better or much better than other centres with only 13% expressing it was worse or much worse.

**Evening Economy**

4.83 A high proportion of respondents (41%) indicated that the range of entertainment, events and performances on offer in Redditch were worse / much worse than other centres in the area. This may explain why, despite the existence of a theatre, cinema and a range of pubs, 67% of respondents do not visit the town centre during the evening / night. However, when asked what measures would improve Redditch town centre less than 1% stated that 'more evening activities' would entice them into the centre, indicating that this is not a priority in terms of attracting more people into Redditch town centre.

4.84 A specific aspect of the town centre that could be improved in order to entice more visitors in the evening would be an increased range and choice of pubs / restaurants. 46% consider the current offer to be poor with only 8% expressing a positive response. In addition, 12.5% of respondents would like to see more restaurants and cafes in Redditch and 8% more drinking establishments. Restaurants and pubs are typically open outside of normal retail hours. Consequently improvements in number and quality of such services may entice more evening visitors into the town centre.

4.85 Another explanation for the low level of evening / night time visitors could be the fear of crime. 45% of respondents considered the evening / night safety of the town centre to be worse / much worse than other centre. By way of comparison only 5% indicated that it was better / much better than other centres with 37% expressing it was about the same. It should be acknowledged, however, that the 18 – 34 age group (the demographic who are most likely to take advantage of the night time economy) felt less vulnerable than other demographic groups when venturing into the town centre in the evening.

**Perceptions and Experience of Redditch Town Centre**

4.86 Results of the on-street survey which have not been mentioned above are shown in the graph below to provide additional comparative data. Responses were coded as either 'much better', 'better', 'about the same' 'worse', or 'much worse'. These in turn have been recoded to 5, 4, 3, 2, 1 respectively to provide a score for each aspect. The table below brings all the remaining results together to provide some comparative data.

| | |
|---|---|
| Choice of Shops | 2.9 |
| Quality of Shops | 3.02 |
| Day time safety | 3.08 |
| Range of Services such as banks and other financial services | 3.1 |
| Public information / signposts / public facilities | 2.72 |
| Public Art | 2.33 |

4.87 It should be noted that a score of 3 equates to an 'average' rating. In terms of negative perceptions below-average scores were given to signage, public facilities and information available, and the choice of shops. In addition, public art was considered to be poor.

**Measures to Encourage Visits to City Centre**

4.88 Aspects of Redditch town centre that could be improved to make it more attractive include:

| | |
|---|---|
| Better foodstore provision | 20% |
| Increased choice / range of shops | 15% |
| More entertainment / leisure facilities | 9% |
| More independent / specialist traders | 4% |
| Public toilets | 4% |
| Improved public transport | 4% |
| Cheaper parking | 3% |
| More quality restaurants / pavement cafes | 3% |
| Don't know | 18% |

4.89 The public view on foodstore provision corresponds with the lack of convenience floorspace as shown in the earlier composition table at Figure 4.2.

**Summary of Redditch Town Centre**

4.90 Redditch is 183rd in the UK shopping rankings. Of its nearest competing centres, only Kidderminster, Worcester and Stratford-upon-Avon are higher in the rankings.

4.91 Yields are at a level of 5.25, one of the lowest in the area. This is lower than the competing centres of Kidderminster, Bromsgrove and Stratford-upon-Avon.

4.92 The town centre has over 200 retail and service units and around 67,000sq.m of floorspace. The comparison goods sector provides a diverse and varied retail offer. Visitors to the town centre, however, expressed a strong desire to see improved foodstore provision in the town centre.

4.93 The number of vacant units has decreased significantly in recent years but the proportion of vacant units is above the national average.

4.94 A key asset of the town centre is the Kingfisher centre which houses a diverse range of national multiple retailers, including key attractors such as Marks and Spencer and Debenhams. The attractive and historic frontages of buildings around St Stephens Church create a pleasant shopping environment. In combination with a well maintained pedestrianised streets and attractive street planting the environmental quality of the town centre is high.

4.95 The surveys suggest that visitors generally are satisfied with the retail offer in the town centre, although improvements to foodstore provision, pubs and restaurants, and entertainment and leisure facilities would be welcomed.

4.96 Overall, the town centre displays strong levels of vitality and viability having regard to the relevant indicators as set out in PPS 6. It is worth noting that the on-street survey revealed that 35% of respondents visit Redditch more frequently than five years ago. This upward trend is symbolic of the attractiveness of Redditch as a retail destination.

**Retail Provision in Redditch Borough outside of the Town Centre**

**Trafford Retail Park**

Aldi

Pets at Home

In Store

Your Choice (Green Grocers)

Iceland

Blockbusters

**Abbey Retail Park**

Allied Carpets

Sainsburys

Homebase

| | |
|---|---|
| **Redditch Ringway Retail Park** | |
| Wickes | Redditch Ringway |
| Currys | Redditch Ringway |

| | |
|---|---|
| **Free Standing Stores** | |
| B & Q | Jinnah Road |
| Tesco Extra | Oakenshaw |
| Morrisons | Warwick Highway |
| Lidl | Redditch Ringway |
| Halfords | (South of Alcester Street) |
| Nationwide Autocentre | (South of Alcester Street) |

4.97 There is also a pseudo retail area immediately to the west of the Trafford Retail Park which includes a furniture store, tile retailer and fabric retailer.

4.98 Outside of Redditch town centre residents benefit from a wide choice of supermarkets, including discount operators. In addition to foodstores residents have access to electrical goods, carpets, DIY and pet related goods.

**The District Centres of Redditch Borough**

4.99 Nine centres are identified in the local Plan No.3. These are:

Astwood Bank

Batchley

Church Hill

Crabbs Cross North & South

Headless Cross

Lodge Park

Matchborough

Winyates

Woodrow

4.100 The role and, in particular, the shopping function of each district centre is described in more detail below.

**Lodge Park**

4.101 The District Centre at Lodge Park is located 1.2km (straight line distance) south east of the Town Centre. The centre benefits from a car park which is located between the front of the shops and the junction of Studley Road to the east and Barlich Way to the south.

4.102 The centre contains 5 units and its retail composition is shown in Figure 4.4 below.

**Figure 4.4: Lodge Park District Centre – Retail Composition**

| | No of units |
|---|---|
| Convenience | 2 |
| Comparison | 0 |
| Service | 5 |
| Vacant | 0 |
| Miscellaneous | 0 |
| Total | 7 |

**Source: White Young Green Planning May 2008**
**Note: Goad classifications used, except pubs and betting shops which are included as 'service'**

4.103 The service sector represents the majority of units within this centre. However, the existence of a Tesco Express provides a top-up shopping facility for surrounding residents. Given the centre's location alongside a highway and the car parking facilities available on site, the centre also serves as a stop off shopping destination for passing traffic.

4.104 Immediately to the south of the existing District Centre boundary is Charlotte Place, which contains a new single storey L shaped building containing a Pizza Hut, Bargain Booze off license and Vets4Pets centre. It also benefits from a car park situated between the front of the units and Studley Road. It is considered that this new facility enhances and complements the District Centre, and suggests that the centre continues to attract investment. In light of this it, when reviewing district centres in the future, the Council should consider relocating the current boundary to include Charlotte Place. (To clarify, the composition table above takes account of the units in Charlotte Place).

4.105 There were no vacant units at the time of the survey.

**Winyates**

4.106 Winyates is located within the eastern section of Redditch approximately 3 km (straight line distance) from Redditch Town Centre. It consists of a purpose built shopping precinct which is located within a residential area. The shops face onto a pedestrianised concourse through the middle of the centre which terminates in a landscaped green. Immediately above the shops are three storeys of accommodation with the roofs of the shops serving as balconies and terraces for the residential accommodation at first floor level. The centre has two car parks, one located to the south and one located to the north.

4.107 The centre contains 10 units and its retail composition is shown in Figure 4.5 below.

**Figure 4.5: Winyates District Centre – Retail Composition**

| | No of units |
|---|---|
| Convenience | 2 |
| Comparison | 2 |
| Service | 3 |
| Vacant | 3 |
| Miscellaneous | 0 |
| Total | 10 |

**Source: White Young Green Planning May 2008**
**Note: Goad classifications used, except pubs and betting shops which are included as 'service'**

4.108 Two large convenience stores dominate the centre. These are located at opposite ends of the centre. The service units comprise of a fish and chip shop, a chinese take away and a pub. The centre also benefits from a Health Centre, Crafts Centre and a Parish Centre all providing local community facilities.

4.109 There were three vacant units at the time of the survey.

**Church Hill**

4.110 Church Hill is located in the northern section of Redditch approximately 2.7km from the Redditch Town Centre. It is surrounded by residential development and comprises of a series of shops laid out a north south axis. It contains a car park, medical centre and church centre.

4.111 The shops all face in westerly direction towards an open landscaped area containing benches around a circular section of tarmac. Maps of the District Centre indicate that the tarmac area was once a pond.

4.112 The centre contains 8 units and its retail composition is shown in Figure 4.6 below.

**Figure 4.6: church Hill District Centre – Retail Composition**

| | No of units |
|---|---|
| Convenience | 1 |
| Comparison | 1 |
| Service | 3 |
| Vacant | 3 |
| Miscellaneous | 0 |
| Total | 8 |

**Source: White Young Green Planning May 2008**
**Note: Goad classifications used, except pubs and betting shops which are included as 'service'**

4.113 The convenience offer comprises of a large McColls store, which contains a Post

Office and Booze Buster concession. At the time of the survey this was trading well with a number of customers taking advantage of the post office and convenience store.

4.114 The comparison offer consists of chemists. Service units consist of a hair salon, fish and chip shop and a pub. There is a large YMCA building located within the centre of the shopping rank. This appears to be a vibrant and busy institution.

4.115 To the north of Church Way the centre extends in an easterly direction and includes a Medical Centre and Church Centre. It should be noted that a clinic once occupied a section of land immediately between the medical centre and car park. This has since been demolished, resulting in a vacant site which is becoming run down harming the appearance of the area.

4.116 There were three vacant units at the time of the survey.

**Matchborough**

4.117 The district centre at Matchborough is situated 2.7 km from Redditch Town Centre. It consists of a purpose built shopping precinct centred around a landscaped courtyard. Immediately to the north and south of the centre are two car parks. To the east is a large verdant area containing a small lake. This area is designated on the Proposals Map as ‘Primarily Open Space’.

4.118 The centre contains 10 units and its retail composition is shown in Figure 4.7 below.

**Figure 4.7: Matchborough District Centre – Retail Composition**

| | No of units |
|---|---|
| Convenience | 1 |
| Comparison | 1 |
| Service | 5 |
| Vacant | 2 |
| Miscellaneous | 0 |
| Total | 10 |

**Source: White Young Green Planning May 2008**
**Note: Goad classifications used, except pubs and betting shops which are included as ‘service’**

4.119 The convenience offer consists of a Cost Cutter store. Within this unit is a post office. This will serve the top up shopping requirements of the local population.

4.120 A pharmacy serves as the only comparison unit. There are 6No. service units.

These include a pub, hairdressers, betting shop, fish and chip shop, Indian take away and café. The café is considered to provide a valuable day time meeting place for local residents. To the west of the main shopping courtyard is a church centre providing a facility for community activities. The physical environment of the centre appeared well maintained and there was no sign of vandalism or decay.

4.121 There were two vacant units at the time of the survey.

**Woodrow**

4.122 Woodrow is located 2.5km south east of Redditch Town Centre. It is a purpose built shopping precinct with residential accommodation located above the shops. The shops face onto a pedestrianised concourse through the middle of the centre.

4.123 The centre contains 10 units and its retail composition is shown in Figure 4.8 below.

**Figure 4.8: Woodrow District Centre – Retail Composition**

| | No of units |
|---|---|
| Convenience | 2 |
| Comparison | 2 |
| Service | 3 |
| Vacant | 3 |
| Miscellaneous | 0 |
| Total | 10 |

**Source: White Young Green Planning May 2008**
**Note: Goad classifications used, except pubs and betting shops which are included as 'service'**

4.124 There are three vacant units which occupy prominent locations within the centre causing the centre to appear somewhat run down. Two local convenience stores make up the majority of the retail offer. The only comparison units comprises of a gift shop and a pharmacy.

4.125 The centre contains a library, hall and clinic. These uses act as visitor attractions to the centre and complement the role and function of the centre.

**Astwood Bank**

4.126 The district centre at Astwood Bank is located approximately 5 kilometres south of Redditch Town Centre. The units are all located to the west of the A441

Evesham Road which runs through Astwood Bank.

4.127 The retail offer is divided into two distinct areas with one section located at the north edge of Astwood Bank and one located at the southern end. Between these two sections are dwellings.

4.128 The centre contains 18 units and its retail composition is shown in Figure 4.9 below.

**Figure 4.9: Astwood Bank District Centre – Retail Composition**

| | No of units |
|---|---|
| Convenience | 3 |
| Comparison | 5 |
| Service | 9 |
| Vacant | 0 |
| Miscellaneous | 1 |
| Total | 18 |

**Source: White Young Green Planning May 2008**
**Note: Goad classifications used, except pubs and betting shops which are included as 'service'**

4.129 Service units dominate the retail offer. These include three take-aways, two estate agents and three hair salons and one pub.

4.130 The comparison offer includes a pharmacy, art gallery and associated framing shop, florists and ladies wear.

4.131 Given the centre's position fronting onto a highway, the centre is likely to serve as a stop-off shopping destination for passing traffic.

**Headless Cross**

4.132 The district centre of Headless Cross is located 1.5km south of Redditch town centre. The shops in the centre line both sides of Evesham Road before extending along the western side of Birchfiled Road. The centre contains a village green at the junction of Birchfield Road and Evesham Road which is designated as 'Primarily Open Space'.

4.133 Overall there are 21 units in the district centre and its retail composition is shown in Figure 4.10 below.

**Figure 4.10: Headless Cross District Centre Retail Composition**

| | No of units |
|---|---|
| **Convenience** | **2** |
| **Comparison** | **4** |
| **Service** | **15** |
| **Vacant** | **0** |
| **Miscellaneous** | **0** |
| **Total** | **21** |

**Source: White Young Green Planning May 2008**
**Note: Goad classifications used, except pubs and betting shops which are included as 'service'**

4.134 As can be seen from Figure 4.10 the vast majority of units fall within the service classification. These include four hairdressers, seven take-aways / restaurants, a betting shop, a travel agent, and two pubs.

4.135 The comparison offer consists of a printing shop, florists, cycle shop and Hardware store.

4.136 The convenience offer consists of co-op foodstore. At the time of the survey no vacant units existed in the district centre.

4.137 Given the centre's position at the convergence of numerous roads, it is a popular stop-off shopping facility for passing traffic.

**Batchley District Centre**

4.138 Batchley District Centre is located 1.6km west of Redditch Town centre. It consists of a purpose built shopping precinct and is located within a suburban residential area. The shops are located at ground floor level and face directly onto a designated parking area with a large landscaped green and pond to the north. The green and pond is part of larger landscape corridor and is designated in the Local Plan as Primarily Open Space. Immediately above the shops are two storeys of accommodation.

4.139 Overall there are 9 units in the district centre and its retail composition is shown in Figure 4.11 below.

**Figure 4.11: Batchley District Centre – Retail Composition**

| | No of units |
|---|---|
| Convenience | 3 |
| Comparison | 1 |
| Service | 5 |
| Vacant | 0 |
| Miscellaneous | 0 |
| Total | 9 |

**Source: White Young Green Planning May 2008**
**Note: Goad classifications used, except pubs and betting shops which are included as 'service'**

4.140 Out of all the district centres, Batchley benefits from the highest percentage of convenience outlets. It has an independent grocers and butchers together with a Spar convenience store. These units serve the day to day food needs of the surrounding residential area.

4.141 Service units include a betting shop, chinese takeaway, a laundrette, fish and chip shop and a large pub.

4.142 The comparison offer comprises of a chemist selling health and beauty goods and a dispensing pharmacy.

4.143 There were no vacant units at the time of the survey.

**Crabbs Cross North & South District Centre**

4.144 Crabbs Cross is located 2.8km south of Redditch Town Centre. It is split into two distinct areas. The first is located on the west side of Evesham Road at the northern edge of the centre. The second area is located at the southern edge of the centre and is located on both sides of Evesham Road. Both areas are separated by Harry Taylor First School on the west side of Evesham Road and dwellings on the east side of Evesham Road. The retail units on the southern section are regularly interspersed by dwellings, whereas the northern section has the visual impression of designated retail and service area.

4.145 When approaching the centre from the south a large pub (situated on the west side of Evesham Road) and florists (on the opposite side of the road) act as visual references to the start of the centre.

4.146 Overall there are 11 units in the district centre and its retail composition is shown in Figure 4.12 below.

**Figure 4.12: Crabbs Cross North & South – Retail Composition**

| | No of units |
|---|---|
| Convenience | 1 |
| Comparison | 5 |
| Service | 4 |
| Vacant | 0 |
| Miscellaneous | 1 |
| Total | 11 |

**Source: White Young Green Planning May 2008**
**Note: Goad classifications used, except pubs and betting shops which are included as 'service'**

4.147 Compared to other district centres the comparison offer is high. It consists of a florist, funeral directors, cash register outlet, gift centre and a pharmacy.

4.148 Service units include a large pub, 2 No. hairdressers and chinese take away. The convenience offer comprises of co-op store.

4.149 The northern section of the centre benefits from Medical Centre, Clinic and Dental Surgery. These are all located around a car park which at the time of visiting was almost full. These facilities attract visitors to the district centre increasing the chances of linked trips.

**Summary**

4.150 Redditch town centre displays reasonably high levels of vitality and viability having regard to the relevant indicators as set out in PPS 6. The town centre has a relatively diverse comparison goods offer but, in terms of convenience goods, the centre lacks a major foodstore. Visitors to the town centre have indicated that they visit Redditch more frequently for shopping purposes than they did five years ago which demonstrates the increasing attractiveness of Redditch as a retail destination. Redditch has three large foodstores in out-of-centre locations and a broad range of retail warehousing. There are nine smaller defined shopping centres in Redditch serving local needs.

# 5.0 Shopping Patterns

**Introduction**

5.01 The tables at Appendix E set out the current shopping patterns within the Study Area for convenience and comparison goods. The patterns are based on the results of the household shopping survey. The responses from the survey are used to calculate the market share of shopping facilities by applying them to the amount of expenditure available within each of the zones in the Study Area. The total available expenditure is calculated by multiplying the population by the per capita estimate of expenditure for different types of goods for each zone as shown in Tables 1, 2, 6 and 7.

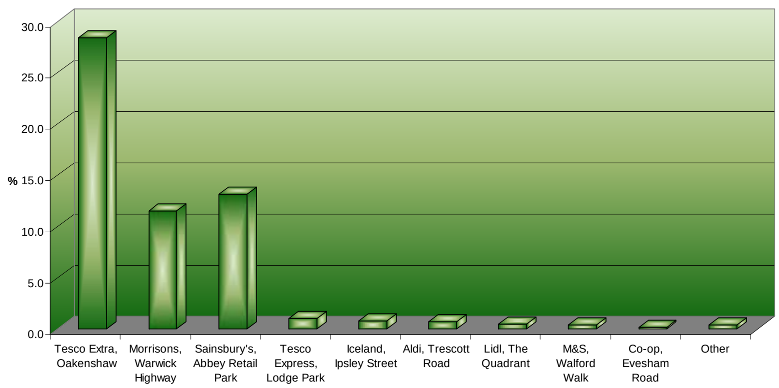
**Convenience Goods Shopping Patterns (Tables 3, 4 and 5)**

5.02 Tables 3 and 4 set out the convenience goods shopping patterns of residents living within the Study Area. The tables distinguish between 'main food' shopping and 'top up' shopping. Top up shopping involves the purchase of items such a bread and milk and is undertaken in between main food shopping trips.

5.03 In the Study Area as a whole, some 28% of main food shopping is undertaken at the Tesco store in Oakenshaw, Redditch. This is the most popular store with residents of the Study Area and, taking into account its 11% market share of top-up shopping expenditure, the Tesco store has a convenience goods turnover of around £76m. The store is particularly popular with residents of Zones 1, 2, 3 and 4 which roughly approximate the administrative area of Redditch Borough and Studley. In terms of main food spending, Tesco attracts 42% from Zone 1 (central and northern Redditch), 43% from Zone 2 (Studley), 54% from Zone 3 (western Redditch) and 60% from Zone 4 (Astwood Bank and the south west of Redditch). The Tesco store also attracts 19% of main food spending from Zone 8 located to the south east of Redditch and Studley, and which includes Alcester.

5.04 The Sainsbury's and Morrisons stores in Redditch have similar turnovers derived from the Study Area (£38m and £36m respectively). The Morrisons store has a relatively high market share of main food spending in Zones 1 and 2 (30% and 23%), whilst Sainsbury's highest market shares are in Zones 2 and 6 (both 25%) (Zone 6 is the area to the north of Redditch and east of the Bromsgrove urban area).

**Figure 5.1 – Redditch Residents Shopping Patterns**



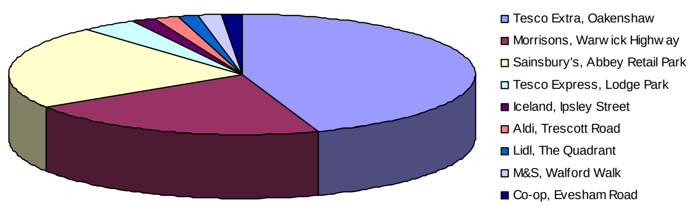

5.05 The turnovers of other stores in Redditch are much lower than the three largest stores mentioned above. In total, stores in Redditch attract £176m of the £314m convenience goods expenditure available in the Study Area (56%). Around £8m is assessed to be spent on the internet or mail order (2.4% of total convenience goods spending).

5.06 Table 5 of Appendix E compares the survey derived turnovers of each of the main stores in Redditch with the turnovers which could be expected if each store traded at their company average sales density. This analysis indicates whether stores in Redditch are undertrading or overtrading individually and collectively in comparison to the benchmark performance of those stores.

5.07 Table 5 shows that all of the stores with the most significant turnovers in Redditch are overtrading, with the exception of Lidl and the foodhall within Marks & Spencer. However, even these stores are not undertrading significantly.

5.08 The three largest stores in Redditch (Tesco, Sainsbury's and Morrisons) are all overtrading by £5m or over. Overtrading in an individual store is not necessarily an indicator of a need for further floorspace but cumulatively stores in Redditch are overtrading by some £22m and this is a strong indication of a need for additional foodstore provision.

**Figure 5.2 – Turnover of Existing Foodstores in Redditch**




**Comparison Goods Shopping Patterns (Tables 8 to 26b)**

5.09 Tables 8 to 26b set out the survey derived shopping patterns within the Study Area relating to the different types of comparison goods. Tables 8 to __ indicate the market shares of shopping facilities in relation to: clothing and footwear; books, CDs and DVDs; chemist goods; toys, games, bicycles and recreational goods; small household goods; electrical items; DIY goods; furniture and carpets. These shopping patterns are then combined to provide an overall assessment of comparison goods shopping patterns including a disaggregation into bulky and non-bulky goods. (Tables 24a to 26b).

***Clothing and Footwear (Tables 8 and 9)***

5.10 Redditch town centre attracts over half (54%) of the expenditure on clothing and footwear generated within the Study Area. The highest market shares are in Zones 1 and 3 (both 80%). The figures suggest that Redditch town centre performs reasonably well in the face of competition from higher order centres. Birmingham city centre, Stratford upon Avon, Bromsgrove, Merry Hill and Solihull combined attract around 27% of expenditure from the Study Area but none of these destinations attract more than 7% individually. 5% of clothing and footwear expenditure is spent on the internet.

***Furniture and Carpets (Tables 10 and 11)***

5.11 Facilities in Redditch attract 35% of spending on furniture and carpets in the Study Area. Bromsgrove has a market share of 16%, Birmingham city centre 8%, Solihull 7%, and Droitwich 6%. 4% of spending is undertaken on the internet.

***DIY Goods (Tables 12 and 13)***

5.12 67% of spending on DIY goods in the Study Area is undertaken in stores in Redditch. The B&Q store alone has a market share of 48%. Bromsgrove attracts approximately 17% of spending.

***Electrical Goods (Tables 14 and 15)***

5.13 Shopping facilities in Redditch have an overall market share of 46% of Study Area-derived spending on electrical goods. This includes the Tesco store in Redditch which has a market share of over 4%. Over 15% of electrical goods expenditure is spent via the internet.

***Books, CDs, and DVDs (Tables 16 and 17)***

5.14 Redditch town centre attracts 38% of Study Area spending on books, CDs and DVDs, with the Tesco store at Oakenshaw adding another 6%. The overall market share of facilities in Redditch is 44%. 33% of spending is attracted to facilities outside of Redditch including 11% to Bromsgrove and 6% to Stratford on Avon. Notably, some 23% of expenditure is spent on-line.

***Small Household Goods (Tables 18 and 19)***

5.15 Almost half of small household goods expenditure generated within the Study Area is spent in Redditch. The town centre attracts 44% and the Tesco store at Oakenshaw attracts 5%. 45% of expenditure is spent in destinations outside Redditch and over 6% is spent on-line.

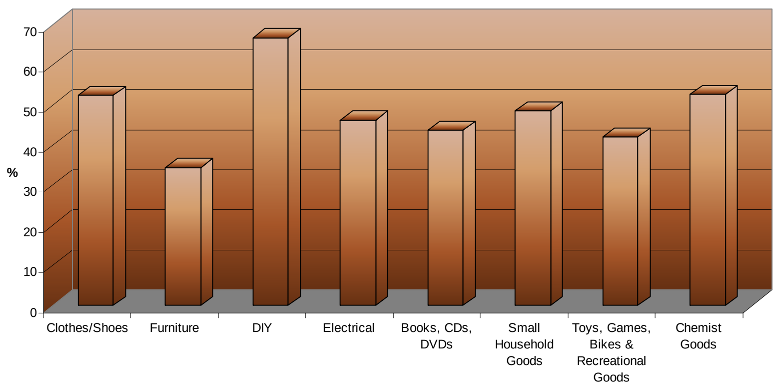
***Toys, Games, Bicycles, and Recreational Goods (Tables 20 and 21)***

5.16 42% of spending on recreational items is directed towards Redditch, 47% to destinations outside Redditch (including 9% to Bromsgrove), and 11% is spent on-line.

***Chemist Goods (Tables 22 and 23)***

5.17 Over half (53%) of spending on chemist goods within the Study Area takes place in Redditch. Of this, over 10% of spending is directed to supermarkets and District Centres in Redditch.

Figure 5.3 – Comparison Goods Shopping Patterns within Redditch




***Overall Comparison Goods***

5.18 Tables 24a and 24b show that shopping facilities in Redditch attract 51% of all spending on comparison goods within the Study Area. This equates to a turnover of £315m. Internet shopping and home delivery services represent over 7% of spending worth over £45m.

5.19 Tables 25a and 25b indicate that £86m (48%) of the total expenditure on bulky comparison goods available in the Study Area is spent in Redditch, whilst Tables 26a and 26b show that £230m (53%) of spending on non-bulky goods is also drawn to shopping facilities in Redditch.

***Internet Shopping / Home Deliveries***

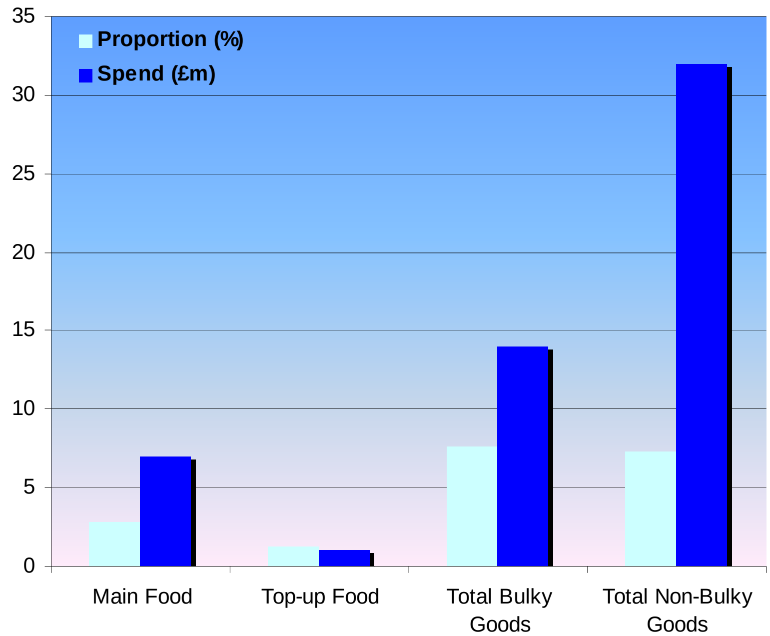
5.20 Figure 5.4 below shows the proportions of spending on internet shopping or home deliveries according to the different types of goods

***Figure 5.4: Internet / Home Delivery Spending***

| | Proportion | Spend |
|---|---|---|
| Main Food | 2.8% | £7m |
| Top Up Food | 1.3% | £1m |
| **TOTAL CONVENIENCE GOODS** | **2.4%** | **£8m** |
| Electrical Goods | 15.2% | £11m |
| DIY Goods | 0.7% | £0m |
| Furniture & Carpets | 3.8% | £2m |
| **Total Bulky Goods** | **7.6%** | **£14m** |
| Clothing & Footwear | 5.1% | £7m |
| Books CDs DVDs | 23.0% | £7m |
| Small Household Goods | 6.4% | £5m |
| Recreational Goods | 11.2% | £12m |

| | | |
|---|---|---|
| Chemist Goods | 1.6% | £1m |
| **Total Non-Bulky Goods** | **7.3%** | **£32m** |
| **TOTAL COMPARISON GOODS** | **7.4%** | **£46m** |

**Figure 5.5 – Internet/Home Delivery Spending**




5.21 Figure 5.5 shows that generally internet shopping for convenience goods is not as popular as shopping on line for comparison goods. Online or other types of home delivery shopping are most popular for purchasing electrical goods, DVDs, CDs and books. A relatively high proportion of spending on recreational goods is also undertaken online. However, the out-of-store purchase of chemist goods and DIY products is very low.

White Young Green

# 6.0 Capacity for Additional Retail Development

**Introduction**

6.01 Following the analysis of shopping patterns in the tables at Appendix E and described in the previous section, this section assesses the capacity for additional retail floorspace.

6.02 The basic steps towards calculating capacity are as follows:

- Start with the total amount of expenditure available within the Study Area (as calculated in Tables 2A and 7).
- Subtract the spending on special forms of trading such as the internet and other forms of non-store shopping activity.
- Assume that a proportion of the total amount of expenditure within the Study Area is available to facilities in Redditch.
- Calculate the difference between the proportion of expenditure available to facilities in Redditch and the actual turnover of existing facilities in Redditch.
- Where appropriate, allow for any current under or overtrading of existing facilities.
- Convert any surplus expenditure into a theoretical floorspace figure using an appropriate sales density (or a range of sales densities) to provide an indication of the likely physical space required.

6.03 As previously indicated in Section 2, retailing is a dynamic industry and growth in consumer expenditure has fluctuated over time. Assumptions regarding future changes must be carefully considered if a robust forecast of the need for additional retail floorspace is to be used for spatial planning purposes.

6.04 In this context, the following assessments of the need for additional convenience and comparison goods floorspace in Redditch present a 'high growth' and 'low growth' scenario based on different assumptions regarding:

- The growth in internet sales / home delivery

- the performance of existing retail facilities and their capacity to absorb growth in expenditure
- the potential for existing and new retail facilities in Redditch to increase their market share of expenditure within the Study Area through improving their attractiveness relative to shopping facilities elsewhere; and
- the sales density of new retail facilities

6.05 By using different assumptions, this capacity assessment produces an upper and lower floorspace requirement for convenience and comparison goods shopping covering the period to 2026. Having regard to qualitative factors, such as the strength of existing shopping facilities and the physical capacity of Redditch to accommodate new shopping facilities, it is possible in the short to medium term to focus upon the most likely and realistic level of floorspace capacity within this range.

6.06 However, the further ahead the forecast, the range of capacity figures becomes broader. Therefore, in line with PPS6 it is recommended that the following capacity assessment is updated regularly as new information and forecasts are issued.

**Convenience Goods**

6.07 Tables 27a and 27b assess the potential capacity for additional convenience goods floorspace in Redditch to 2026.

6.08 Table 27a presents a 'low growth' scenario which assumes the following:

- Special Forms of Trading will increase to 4% of all spending by 2013, then remain constant, having the effect of absorbing a higher proportion of available expenditure in the Study Area
- The market share of in-store sales (allowing for the increase in internet sales) remains at around 57%, the market share of existing facilities selling convenience goods in Redditch.

6.09 Table 27b presents a 'high growth' scenario based on the flowing assumptions:

- Special Forms of Trading will remain at their present levels, assessed to be

2.4% of all spending on convenience goods within the Study Area, thus assuming that the popularity of internet shopping for convenience goods has already peaked.

- The market share of in-store sales in Redditch increases from around 57% to 62%. It is assumed that an uplift will arise as a result of the population of Redditch increasing at a higher rate than other areas within the Study Area, and/or the attractiveness of the retail offer in Redditch will increase relative to the attractiveness of shopping facilities outside of Redditch.

6.10 Depending on the assumptions used, the capacity assessment produces the following results for the present year and the years 2013, 2018, and 2026:

**Figure 6.1: Capacity for Additional Convenience Goods Facilities**

| Year | Low Growth Scenario | High Growth Scenario |
|---|---|---|
| 2008 | £22m | £22m |
| 2013 | £25m | £45m |
| 2018 | £32m | £53m |
| 2026 | £45m | £69m |

6.11 Figure __ indicates that there is currently (2008) some £22m of expenditure capacity to support additional convenience goods floorspace. This capacity is based on the assessed level of overtrading at existing stores in Redditch. Capacity is set to grow over the study period and, in 2013, this could amount to between £25m and £45m depending on whether a low or a high growth scenario is adopted.

6.12 As an indication of the amount of floorspace that this level of expenditure capacity could theoretically support, an appropriate sales density can be used. For the purposes of this assessment, a sales density of £10,000 per sq m has been assumed for large format supermarkets and £5,000 per sq m has been adopted for smaller stores serving more local catchments.

6.13 On this basis, the capacity assessment produces the following results:

**Figure 6.2: Requirement for Additional Convenience Goods Floorspace (sq m)**

| Year | Low Growth Scenario | | High Growth Scenario | |
|---|---|---|---|---|
| | Large Format Store | Small Format Store | Large Format Store | Small Format Store |
| 2008 | 2200 | 4400 | 2200 | 4400 |
| 2013 | 2500 | 5100 | 4500 | 9000 |
| 2018 | 3200 | 6400 | 5300 | 10600 |
| 2026 | 4500 | 9100 | 6900 | 13800 |

Note: Net sales floorspace figures rounded to the nearest 100 sq m

6.14 Irrespective of whether a low or a high growth scenario is adopted, the capacity assessment suggests that the levels of surplus convenience goods expenditure could support a new foodstore in Redditch in the short term. Even the low growth scenario indicates a requirement for 3,200sqm net of large format floorspace in 2018 which, allowing for an element of comparison goods, would be equivalent to a store similar in size to the existing Sainsbury's or Morrison stores in Redditch.

**Comparison Goods**

6.15 Tables 28a and 28b assess the potential capacity for additional comparison goods floorspace in Redditch to 2026.

6.16 Table 28a presents a 'low growth' scenario which assumes the following:

- Special Forms of Trading will increase to 12% of all spending by 2013 (based on information in Experian Retail Planner Briefing Note 5.1), then remain constant, having the effect of absorbing a higher proportion of available expenditure in the Study Area

- The market share of in-store sales (allowing for the increase in internet sales) remains at around 53% for non-bulky goods and 52% for bulky goods.

6.17 Table 27b presents a 'high growth' scenario based on the flowing assumptions:

- Special Forms of Trading will remain at their present levels, assessed to be 7.3% of all spending on non-bulky goods within the Study Area and 7.5% for bulky goods, thus assuming that the popularity of internet shopping for comparison goods has already peaked.

- The market share of in-store sales in Redditch increases by 5% from around 53% to 58% for non-bulky goods and from 52% to 57% for bulky goods. It is assumed that an uplift will arise as a result of the population of Redditch increasing at a higher rate than other areas within the Study Area, and/or the attractiveness of the retail offer in Redditch will increase relative to the attractiveness of shopping facilities outside of Redditch.

6.18 Depending on the assumptions used, the capacity assessment produces the following results for years 2013, 2018, and 2026:

**Figure 6.3: Capacity for Additional Comparison Goods Facilities**

| Year | Low Growth Scenario | High Growth Scenario |
|---|---|---|
| 2013 | £27m non-bulky<br>£11m bulky<br>£38m total | £93m non-bulky<br>£37m bulky<br>£130m total |
| 2018 | £82m non-bulky<br>£33m bulky<br>£114m total | £188m non-bulky<br>£75m bulky<br>£264m total |
| 2026 | £220m non-bulky<br>£88m bulky<br>£309m total | £409m non-bulky<br>£163m bulky<br>£572m total |

6.19 As an indication of the amount of floorspace that this level of expenditure capacity could theoretically support, an appropriate sales density for new bulky and non-bulky goods floorspace has been used. For the purposes of this assessment, a sales density of £4,500 per sq m has been assumed for non-bulky goods floorspace and £2,000 per sq m has been adopted for bulky goods floorspace.

6.20 On this basis, the capacity assessment produces the following results:

**Figure 6.4: Requirement for Additional Comparison Goods Floorspace**

| Year | Low Growth Scenario | High Growth Scenario |
|---|---|---|
| 2013 | 10,000 sq m net | 39,000 sq m net |
| 2018 | 28,000 sq m net | 80,000 sq m net |
| 2026 | 62,000 sq m net | 172,000 sq m net |

Note: Figures rounded to the nearest 1,000sqm

6.21 The capacity assessment indicates a significant requirement for additional comparison goods floorspace. Even adopting the low growth scenario, the figures suggest 28,000sq.m. of additional net floorspace is needed by 2018.

# 7.0 Leisure Facilities

**Introduction**

7.01 This section of the study examines commercial leisure facilities in Redditch. Sub-sectors such as health and fitness, cinemas and bingo halls are addressed in turn below, examining trends in the industry. Facilities available to Redditch residents are assessed and the section concludes by assessing the potential for additional facilities.

7.02 Leisure is the most rapidly expanding sector of the UK economy and has experienced dramatic changes and growth during the last decade. The main sectors in the leisure industry are explored below in more detail.

<u>Cinemas</u>

7.03 During the mid-1990s the established multiplex cinema operators undertook a rapid expansion throughout the United Kingdom. The operators moved away from their traditional City Centre locations and opened large 'category killer' cinemas (usually between 12-16 screens). This expansion marked the advent of the out of town leisure park as other leisure operators sought to locate adjacent to the cinemas, believing there was a natural synergy between the uses. This in turn fuelled the expansion in health & fitness and revived the interest in bowling centres.

7.04 The cinema operators had traditionally expanded on a piecemeal basis, usually by acquiring their own freehold site but in order to realise the proposed rapid expansion, the operators had to sign up to institutional leases with high rents. Operators quickly realised that these rental levels were unsustainable. At the same time, the operators realised that they were reaching saturation level and could not sustain any further large developments. This was coupled with the downturn in cinema attendances, primarily as a result of limited 'blockbuster' movies.

7.05 As a consequence, operators slowed down their acquisition programmes, although two companies were borne out of this, namely Cine UK and Spean Bridge, who identified that there was a need for a multiplex in smaller towns but of a smaller scale. Many developers were left with sites with leisure consent and no operator of any strength and in reality they needed a cinema to anchor the scheme and attract the associated uses. Therefore, the likes of Cine UK undertook a relatively unchallenged expansion throughout the United Kingdom, cherry picking the opportunities that were available and driving extremely hard financial transactions. This had a substantial impact on the developer's residual valuation and in many cases prevented sites earmarked for leisure development progressing.

7.06 More latterly, acquisition of cinemas has been at a corporate level with the main operators pursuing company acquisitions. As a consequence, the two most active operators in the United Kingdom are currently Vue and Cineworld.

7.07 Redditch has one cinema in the town centre: the Apollo Cinema located on the first floor of the Kingfisher Centre. This is a 7 no. screen cinema complex open daily until 11pm. The household survey revealed that 30% of residents who visited cinemas in the Survey Area as a whole choose this facility. Within zones 1 – 4, 49% of residents visit this cinema. Within zones 5 to 7 only 7% visit this cinema. It is interesting to note, however, that it is a popular destination for 21% of residents living in to Zone 8 (Alcester and the area south east of Redditch). The most popular cinema with residents of the Survey Area is the Empire Cinema in Rednal with 51% of cinema visitors selecting this facility.

Health and Fitness

7.08 At the same time as cinema expansion, the concept of the modern large private members health and fitness club was realised and there then followed expansion throughout the country, and examples include Esporta and Greens. This particular market has reached saturation point with operators now opening very few new health clubs and expansion tending to occur through a company acquisition. As the concept evolved, certain operators recognised the need for representation in smaller towns and therefore, the likes of Fitness First and LA Fitness progressed an acquisition programme based on smaller units.

7.09 More recently, two operators entered the market to aggressively compete, namely Total Fitness, whose philosophy is to construct large health clubs with lower membership fees and JJB Sports, who have pioneered their concept of a ground floor health & fitness club with mezzanine level retail, primarily situated on retail parks.

7.10 Redditch has three leisure centres and a swimming pool operated by Redditch Borough Council. These comprise of the following: Abbey Stadium, which includes an outdoor athletics track; Arrow Vale Sports Centre, which offers a floodlight outdoor artificial training pitch; Kingsway Sports Centre, which has a 20 metres swimming pool; and Hewell Road swimming pool located close to Batchley District Centre.

7.11 In addition, there are a number of private health and fitness facilities within Redditch Borough, including the following:

Eze Fitness, Alcester Street

Energie Fitness, Battens Drive

Fitness Unlimited, Ipsley Street

Gymophobics, Albert Street

7.12 It should be noted that the most popular health and fitness facility for residents in the Survey Area as a whole is the David Lloyd Leisure, Bromsgrove. The household survey revealed that 19% of respondents used this facility. It should be noted, however, that the majority of visitors to this facility live in close proximity within Zones 5 & 6 (Bromsgrove and the area to the north of Redditch).

7.13 The most popular public sector leisure facility was the Abbey Stadium with 8% of residents confirming they visited this centre. With regard to zones 1 – 4 10% of residents visit this facility. It is interesting to note that it is most popular with residents living in Zone 3 (25%) (southwest Redditch) but did not receive any visitors from residents in Zone 2 (southeast Redditch). In terms of private facilities Energie Fitness and Eze fitness both attracted 5% of respondents.

7.14 The household survey revealed that 15% of respondents in the Survey Area as a whole would like to see an extra swimming pool located in the Redditch area. With regard to Zones 1 – 4, 19% of residents expressed this view compared to 12% in Zones 5 – 8.

Bowling

7.15 Bowling centres have long been a traditional place of family entertainment. However the concept had never been updated. Various operators tried to expand the concept to a family entertainment centre, which was effectively meant to be a combination of several complementary uses under one roof. This concept failed but did revive interest in upgrading the bowling centre offer.

7.16 There is still only a handful of bowling centre operators seeking to expand, the best known of which is Hollywood Bowl, although there is a number of strong original operators now undertaking expansions throughout the United Kingdom.

7.17 As with the cinema operators however, the fit out costs of bowling centres are extremely high and therefore they do tend to negotiate transactions whereby they receive substantial amounts of up front cash from the developer. The other criterion for bowling centre operators is synergy with adjacent users, in particular cinemas, and the operators prefer sites with large amounts of free car parking.

7.18 Mintel note that the popularity of tenpin bowling has declined in recent years, and it is anticipated that this trend will continue. Tenpin bowling has undergone a shift in patronage in recent years, with attendees now more likely to be part of group visiting the location for mixed leisure activities rather than solely for ten-pin bowling. However, although demand for ten pin bowling alleys is likely to be restricted, demand for the expansion and refurbishment of existing venues may increase.

7.19 There is one ten pin bowling facility in Redditch: Hewell Bowling Club. Only 3% of residents who bowl across the Survey Area visited this facility. With regard to residents living in Zone 1 – 4, 5% of residents visited this facility compared to 2% living in Zones 5 – 8.

7.20 Across the Survey Area as a whole the Hollywood Bowl located in Rednal, Birmingham was popular with 82% of residents who bowl. 10% of those who bowl visited bowling facilities once every two months.

Restaurants

7.21 This sector also expanded to mirror the cinema expansion and was effectively split into two offers, namely out-of-town situated on leisure parks and the more traditional town centre offer.

7.22 The leisure park offer ultimately either performed poorly or reached a saturation level and now there are only two or three restaurant operators, such as Pizza Hut, Frankie & Bennys and Nandos who are actively acquiring units in these locations.

7.23 Within the town centre restaurant offer, this in many ways has mirrored the trend of the edge-of-town/ out-of-town operators with many having reached saturation level in town and city centres. There has also been a noticeable lack of 'new entrants' into the sector and therefore over and above the established national names such as Pizza Hut, McDonald's, and Chiquito one is looking towards the strong independents such as The Living Room, Croma and Piccolinos to take vacant space in city centres.

7.24 Restaurants in Redditch primarily consist of those serving Indian and Chinese cuisine. A McDonalds and Subway are located in the Kingfisher Centre offering fast food. Beyond the town centre fast food is available at 2 no. McDonalds and a KFC.

7.25 The on–street survey revealed that 46% of residents from the Survey Area as a whole consider the current range and choice of pubs / restaurants to be poor with only 8% expressing a positive response. In addition, 12.5% of respondents would like to see more restaurants and cafes in Redditch.

7.26 The household survey revealed that 1% residents living in Zones 1 – 4 wished to see more restaurants in the town centre.

Public Houses

7.27 The public house operators can effectively be split into three sectors; edge-of-town on leisure parks; edge-of-town standalone on busy arterial roads; and town centre.

7.28 Many operators jumped onto the success of the edge-of-town leisure development. However, it became apparent that this concept would not work for the public house operators. As a consequence the expansion on such schemes is extremely limited.

7.29 The operators remain extremely keen on the potential to acquire sites on a freehold basis in good suburban areas and on prominent main roads and often will combine their requirement with a budget hotel operator if possible.

7.30 In the town centre market, again due to corporate acquisition of companies, there is a very limited amount of new entrants.

7.31 There are seven pubs located within the town centre. In addition, a number of District Centres contain pubs.

7.32 The on–street survey revealed that 46% consider the current range and choice of pubs / restaurants to be poor with only 8% expressing a positive response. In addition, 8% of respondents would like to see more restaurants and cafes in Redditch.

7.33 The household survey revealed that 1% residents living in Zones 1 – 4 wished to see more bars and pubs in the town centre.

Bingo

7.34 Bingo has been well represented over many years. Initially operators located themselves in town centre sites, either at ground floor or at first floor. However, operators now have a preference to locate on freestanding edge-of-town locations with free customer car parking. Of all the leisure operators, bingo is seen to be the less concerned about adjacencies, i.e. adjacent leisure operators as the concept seems to be able to trade very successfully on its own. However, although bingo participation with the younger population has increased in recent years the smoking ban is likely to affect future expansion in this sector, at least in the short term. The smoking ban which took effect in Scotland before England has affected trading performance of a number of bingo clubs there.

7.35 The town centre contains one bingo hall: Shipleys to the rear of Alcester Street. 55% of residents from across the Survey Area as a whole who play bingo use this facility. 65% of residents living Zones 1 – 4 who play bingo visited this bingo hall, compared to 39% in Zones 5 – 8. A small number of residents (6 %) living in Zones 1 – 4 also played bingo at Batchley Social Club.

**Summary**

7.36 PPS 6 (paragraph 2.23) advises Council's to prepare policies to help manage the evening and night time economy. Policies should encourage a range of uses which appeal to a wide range of age and social groups and should ensure "*that provision is made where appropriate for a range of leisure, cultural and tourism activities such as cinemas, theatres, restaurants, public houses, bars, night clubs and cafes".*

7.37 It is considered that the Borough as a whole has a reasonable range of leisure facilities. However, the majority of facilities are located outside of the town centre. As a result, the on-street survey revealed a strong desire for improved leisure facilities within the town centre. The majority of respondents (44%) considered Redditch offered worse leisure facilities than other centres in the area. This is in stark contrast to just 5% who considered it better than other centres. The on-street survey also revealed that the range of restaurants and pubs was not rated highly by visitors. However, the household survey revealed that the lack of restaurants on pubs was not a priority in terms of attracting more people into Redditch town centre.

# 8.0 Recommended Strategy

**Introduction**

8.01 This section provides a recommended retail and leisure strategy for Redditch. It includes an assessment of potential areas which could accommodate additional retail and leisure development. Previous sections of this study have highlighted a quantitative requirement for significant levels of additional convenience and comparison goods floorspace over the period to 2026 as follows:

**Figure 8.1: Requirement for Additional Convenience Goods Floorspace (sq m)**

| Year | Low Growth Scenario | | High Growth Scenario | |
|---|---|---|---|---|
| | Large Format Store | Small Format Store | Large Format Store | Small Format Store |
| 2008 | 2200 | 4400 | 2200 | 4400 |
| 2013 | 2500 | 5100 | 4500 | 9000 |
| 2018 | 3200 | 6400 | 5300 | 10600 |
| 2026 | 4500 | 9100 | 6900 | 13800 |

Note: Net sales floorspace figures rounded to the nearest 100 sq m

**Figure 8.2: Requirement for Additional Comparison Goods Floorspace**

| Year | Low Growth Scenario | High Growth Scenario |
|---|---|---|
| 2013 | 10,000 sq m net | 39,000 sq m net |
| 2018 | 28,000 sq m net | 80,000 sq m net |
| 2026 | 62,000 sq m net | 172,000 sq m net |

Note: Figures rounded to the nearest 1,000sqm

8.02 Potential areas to accommodate additional development have been identified and assessed following discussions with officers at Redditch Borough Council, on the basis of our own surveys, and having regard to existing retail or mixed use allocations in the Local Plan. The areas of opportunity have been assessed in general terms having regard to their availability, suitability and viability for retail and other town centre uses in accordance with the sequential approach as set out in PPS6.

**Areas for New Development**

8.03 In the context of a forecast rise in population and expenditure growth within the study area, there is a need for further comparison goods floorspace in Redditch. In addition, taking into account overtrading in existing foodstores in the town, and forecast growth in expenditure, there is also a need for further convenience goods floorspace. In qualitative terms, there is a need for a broader range of comparison goods shops in the town centre to increase diversity and consumer choice, and the town centre has a comparatively poor convenience goods offer and lacks a major foodstore. Improvements in both convenience and, to a lesser degree, comparison goods provision in the town centre would boost the vitality and viability of the centre.

8.04 Ideally, the need for additional retail development should be predominantly addressed through a large site (or sites) rather than a large number of small sites., on the basis that, the concentration of new retail development in one or two areas will help to achieve the ‘critical mass’ required to attract investment. New retail development should, wherever possible, either be within or well-related to the existing Primary Shopping Area.

8.05 In this context, the area known as the North West Quadrant is a preferred location in terms of attracting redevelopment. It is unlikely that the site would appeal to investors wanting to build a new shopping centre predominantly for comparison goods, as the Kingfisher Shopping Centre is reasonably successful in attracting retailers and customers and is a well-established destination. Moreover, as previously noted, Redditch is not a high-order shopping destination in the regional hierarchy of shopping centres and, unlike Birmingham, Cheltenham or Worcester, it is unlikely to be able to support two major shopping centres in the short to medium term in terms of retailer demand. If a major new shopping centre were built in the North West Quadrant area, instead of complementing the Kingfisher Centre, it is more likely to compete with it to attract predominantly the same retailers and the same customers, leading to a shift in the centre of retail 'gravity' within the centre or to a dilution in the quality of retail offer in both, to the detriment of both centres.

8.06 This does not necessarily preclude a major expansion of the town centre in the longer term. There is significant population growth forecast in and around Redditch, expenditure growth may increase steadily and, over the next 5 to 10 years, Redditch may increase its attractiveness as a retail destination relative to other centres in the sub-region.

8.07 However, given the overriding quantitative and qualitative need for further convenience goods floorspace, it is recommended that a foodstore development provides the catalyst for the redevelopment of the North West Quadrant area. In light of the section of the study which highlights a relative lack of leisure and entertainment facilities in the town centre, a new supermarket should ideally form part of a mixed-use development including food and drink, and leisure uses. Non-food retail units, of varying sizes, may also be provided to help meet the quantitative need for additional comparison goods floorspace.

8.08 Development opportunities within the town centre of Redditch are scarce so the North West Quadrant should be carefully planned, ensuring an appropriate mix and density of uses. New development must provide strong pedestrian links with existing shops and services in the town centre. Residential uses may also be included if feasible. An up-to-date supplementary planning document, possiby in the form of an Area Action Plan, for the Quadrant should be prepared to help site assembly (potentially through the use of CPO), identify key uses, encourage investors, and guide the design of the development.

8.09 The North West Quadrant should therefore be the main focus for new retail and leisure development in Redditch in the short to medium term.

8.10 In terms of other areas of opportunity for new retail development, it is understood that Car Park no. 4 at the Kingfisher Centre may become available in the future. This site has been the subject of alternative development proposal in recent years (eg for a cinema) and it is understood that, while an element of compensatory car parking provision should form part of any redevelopment scheme, this car park is one of the least well used of the town centres car parking facilities.

8.11 This site is located between Clarke Street and the Redditch Ringway. It has direct pedestrian access into the Kingfisher Centre. It currently contains a multi storey car park with 585 parking spaces.

8.12 It is recommended that this site merits further investigation regarding its suitability to accommodate retail development.

8.13 Edwards Street is located outside of the defined Town Centre directly to the east of Redditch Train Station. It is bounded by residential properties to the south and modern industrial units to the west and north.

8.14 The site measures approximately 0.48 hectares. It contains a number of buildings developed in the 19th century, the majority of which are locally listed.

8.15 The site appears to be physically seperated from the town centre by the Redditch Ringway, which is elevated at this point. . However, the Kingfisher Centre is located 25 metres to the east. Direct access onto the main floor of the mall can be achieved via escalators located alongside the bus station. As a result, whilst the area is detached from the on-street component of the town centre (owing to the Redditch Ringway and lack of continuous retail frontage linking Unicorn Hill to Hewell Road and Edward Street beyond) it has good links with the Kingfisher Centre.

8.16 In terms of suitability / viability for a retail development the site may be constrained in relation to its commercial attractiveness particularly for mainstream food retailers owing to lack of visibility and accessibility difficulties. It is not located on a highway with frequent traffic movements, but rather a suburban residential street. As a result it may not attract the levels of passing traffic to sustain a foodstore or enable convenient access for car borne trade. In addition the existence of a number of locally listed buildings on the site may discourage a foodstore developer.

8.17 In summary, the Edward Street site and Car Park no. 4 may have potential for future retail development in the long term, but the North West Quadrant should be the focus for new retail and leisure development in the short to medium term.

8.18 There is also the potential to provide additional retail development in the longer term in conjunction with future planned growth in Redditch, in the form of a District Centre, depending on a number of factors which are discussed below.

**District and Local Centres**

8.19 There are nine defined District Centres in the Local Plan. At Appendix A Table 1, PPS6 describes a District Centre as follows:

> *"District Centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services such as banks, building societies, and restaurants, as well as local public facilities such as a library"*

8.20 It is considered that none of the defined District Centres in Redditch fulfil this role and are best described as Local Centres which PPS6 describes as centres which:

*"include a range of small shops of a local nature, serving a small catchment area. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office, and a pharmacy. Other facilities could include a hot food takeaway and launderette. In rural areas large villages may perform the role of local centres"*

8.21 In the context of continuing research into the preferred location for significant housing growth in and around Redditch, there is likely to be scope for the provision of a new district centre (or centres) to serve the needs of the larger new housing areas. Such a centre (or centres) could also help serve local needs in existing areas which currently lack a range of facilities (e.g. some northern and western areas of Redditch). A new district centre may not necessarily be located within the administrative boundary of Redditch. The location of new centres should be carefully considered in the context of the need to serve new housing growth areas and existing housing areas within Redditch which lack easy access to a foodstore capable of serving main food shopping requirements.

8.22 There is significant expenditure to support additional convenience and comparison goods floorspace in the town, and a new district centre (or centres) could help to physical accommodate further facilities. However, in terms of convenience goods, a proposed supermarket in a new District Centre must not undermine the prospects of a new supermarket coming forward in the North West Quadrant area of the town centre. Also, in terms of both convenience and comparison goods, new facilities in a District Centre should predominantly serve locally generated needs only, and not the town as a whole, or the wider area. New shopping facilities serving residents of Redditch as a whole should first be directed towards the town centre.

**Primary and Secondary Shopping Areas**

8.23 According to PPS6 (Table 2, Annexe A), the Primary Shopping Area is the defined area *"where retail development is concentrated (generally comprising the primary and those secondary frontages which are contiguous and closely related to the primary shopping frontage). The extent of the Primary Shopping Area should be defined on the proposals map"*

8.24 The definition of the Primary Shopping Frontage and the Primary Shopping Area is of great importance. Planning policies can be formulated to prevent the dilution of the main retail function of the Primary Shopping Frontage. Also, importantly, the Primary Shopping Area constitutes 'the centre' for retail development. A site which lies outside the Primary Shopping Area falls outside 'the centre' for the purposes of retail planning policy. Therefore, the extent of the Primary Shopping Area has a significant bearing on deciding where to allocate sites for further retail development and in the consideration of applications for new retail development.

8.25 Having regard to the definitions contained in PPS6 and based on the latest Experian Goad plan, it is considered that the Town Centre corresponds to the area defined on the Local Plan No.3 Town Centre Inset Map.

8.26 The Primary Shopping Area is considered to include the Kingfisher Centre, Evesham Street, Unicorn Hill, Market Place, Church Green East, Church Green West and Alcester Street. These streets radiate from Church Green and form the main axis of the centre.

8.27 With regard to the Primary frontage, it is considered to include the Market Place frontage and all floors of the Kingfisher Centre. Unlike other frontages within the Primary Shopping Area, a high proportion of units within these areas are in A1 retail use.

8.28 The Secondary frontage is defined in PPS 6 as those frontages that provide 'greater opportunities for a diversity of uses'. It is considered, therefore, that the range of uses found on Alcester Street, Church Green East, Church Green West and Unicorn Hill warrant their designation as Secondary frontage.

**Out-of-Centre Retailing**

8.29 It is considered that the areas identified previously in this section can potentially accommodate the realsistic requirements for additional convenience and comparison goods floorspace in the short to medium term. There is no need to allocate additional sites for retail development outside the town centre, unless it is to provide a new District Centre to serve a growth area, as previously discussed.

8.30 Policies in development plan documents should direct all retail development in the first instance towards the town centre (and to the District or Local Centres where appropriate in scale to the role of that particular centre which predominantly serves local needs).

8.31 In terms of existing out-of-centre floorspace, applications to vary conditions which would change the character of the existing development, for example by lifting restrictions on the type of goods to be sold or by sub-dividing units, should only be approved in appropriate circumstances taking into account relevant 'tests' set out in PPS6. .

# 9.0 Conclusion

**Existing Shopping Facilities in Redditch Borough**

9.01 Redditch town centre displays reasonably high levels of vitality and viability having regard to the relevant indicators as set out in PPS 6. The town centre has a relatively diverse comparison goods offer but, in terms of convenience goods, the centre lacks a major foodstore. Visitors to the town centre have indicated that they visit Redditch more frequently for shopping purposes than they did five years ago which demonstrates the increasing attractiveness of Redditch as a retail destination. Redditch has three large foodstores in out-of-centre locations and a broad range of retail warehousing. There are nine smaller defined shopping centres in Redditch serving local needs.

**Leisure Facilities**

9.02 It is considered that the Borough as a whole has a reasonable range of leisure facilities. However, the majority of facilities are located outside of the town centre. Surveys conducted as part of this study revealed a strong desire for improved leisure facilities within the town centre.

**The Need for Additional Retail Facilities**

9.03 There is a quantative requirement for significant levels of additional convenience and comparison goods floorspace over the period to 2026. In qualitative terms, there is a need for a broader range of comparison goods shops in the town centre to increase diversity of consumer choice, and the town centre has a comparatively poor convenience goods offer and lacks a major foodstore.

**Opportunity Sites**

9.04 The area known as the North West Quadrant is a preferred location in terms of attracting redevelopment. Given the overriding quantitative and qualitative need for further convenience goods floorspace, it is recommended that a foodstore development provides the catalyst for the redevelopment of the North West Quadrant area

9.05 The Edward Street site and Car Park no. 4 may have potential for future retail development in the long term, but the North West Quadrant should be the focus for new retail and leisure development in the short to medium term.

9.06 There is likely to be scope for a new district centre to serve the new housing areas mainly to the north of the town. Such a centre could also help serve local needs in existing areas which currently lack a range of facilities (e.g. some northern and western areas of Redditch). A new district centre may not necessarily be located within the administrative boundary of Redditch.

**Out-of-Centre Retailing**

9.07 There is no need to allocate additional sites for retail development outside the town centre, unless it is to provide a new district centre to serve a growth area. Policies in development plan documents should direct all retail development in the first instance towards the town centre.

9.08 In terms of existing out-of-centre floorspace, applications to vary conditions which would change the character of the existing development, for example by lifting restrictions on the type of goods to be sold or by sub-dividing units, should only be approved in exceptional circumstances.

# Appendices

White Young Green

**APPENDIX A**

**Study Area and Survey Zones**

**APPENDIX B**

**NEMS Household Survey and Results**

White Young Green

**APPENDIX C**

**NEMS On-Street Survey and Results**

**APPENDIX D**

**Goad Plan**

**APPENDIX E**

**Quantative Tables**