



South Worcestershire Retail and Town Centres Study

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Volume 1 of 2 – Main Report



WYG, 90 Victoria Street, Bristol, BS1 6DP
Tel: +44 (0)117 9254393
Email: bristol.planning@wyg.com www.wyg.com

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1.0 Introduction

1.1 Instruction

- 1.1.1 WYG Planning ('WYG') was commissioned by Worcester City, Malvern Hills District and Wychavon District Council (South Worcestershire Councils) in December 2018 to undertake a Retail and Centres Study for the south Worcestershire area. The key purpose of this study is to act as the evidence base to assist in the formulation of future development plan policy and land use allocations, as well as providing baseline information to assist in the determination of planning applications for retail and leisure development. The study superseded the previous retail and leisure studies completed on behalf of the Councils' namely the:
- Wychavon Town Centres & Retail Study, 2006;
 - Malvern Hills Town Centres & Retail Study, 2007;
 - Wychavon Town Centres & Retail Study, 2007 Update;
 - Worcester Retail Study, September 2007;
 - South Worcestershire Town Centres & Retail Strategy, September 2007;
 - South Worcestershire Retail Study Update, December 2010; and
 - South Worcestershire Retail Study Update, September 2013.
- 1.1.2 This Study will be used to inform policy in the revised South Worcestershire Development Plan which will cover the period to 2041. The revised SWDP is expected to be adopted in 2021 and will identify how land is used and help determine what will be built where. The Issues and Options consultation took place between November and December 2018 with the next consultation stage, Preferred Options, currently scheduled for November and December 2019.
- 1.1.3 The main objective of this study is to provide a National Planning Policy Framework (NPPF) and National Planning Policy Guidance (NPPG) compliant Retail & Town Centre Study, which provides the Council with an up-to-date objective assessment of retail and leisure development needs, together with a clear understanding of retail and leisure provision and potential strategic responses/recommendations.
- 1.1.4 The study explores retail and commercial leisure need over the plan period to 2041 and provides an up to date review of the performance of the town centres in South Worcestershire. The objectives of the study are to:
- define the catchment areas of Worcester City Centre and Great Malvern, Droitwich Spa, Evesham, Pershore, Upton-upon-Severn and Tenbury Wells town, district and local centres;
 - provide a health check for each city and town centre using a range of qualitative and quantitative data, considering the strengths and weaknesses of each centre;

- provide recommendations on the quantum of new retail floorspace required (or excess capacity) for both convenience and comparison retailing for each city or town centre;
- provide a consideration of the need for additional floorspace to accommodate other town centre non-retail uses;
- provide a calculation of the extent of retail expenditure leakage from the city and town centres, and south Worcestershire as a whole, along with an assessment of potential options to reduce this;
- assess the impact of out of centre development on the city and town centres and evidence an appropriate local threshold for a leisure and retail impact test for each centre;
- provide a review of the adopted retail policies for their effectiveness in maintaining the vitality of the centres and providing evidence to support proposed changes to policy;
- provide a review of the defined primary and secondary retail frontages;
- review the city and town centre boundaries for effectiveness and appropriateness
- review adopted policies for city and town centres and provide recommendations as to how they can be made more effective; and
- provide an overall retail strategy for south Worcestershire with development targets to 2041.

- 1.1.5 Key contributions to the above objectives have been a number of items of new empirical research. First, we have commissioned NEMS Market Research to undertake a new a shopping survey of 1,700 households. The Study Area for the survey comprises 17 zones which are based on postcode areas grouped around one or more of the existing town centres.
- 1.1.6 The second area of empirical research has been in relation to the assessment of the health of the 7 town centres. This exercise has incorporated land use surveys of these defined centres, along with a review of health check indicators and an appraisal of the qualitative results of the household survey data.
- 1.1.7 In addition, as part of the assessment of key town centre health issues, engagement, including a workshop, has taken place with key Stakeholders in South Worcestershire to obtain views on, *inter alia*, existing town centre strengths, weaknesses, opportunities and threats; potential suggested town centre improvements; and retailer/leisure provider requirements/needs.
- 1.1.8 The Study is also informed by industry research having regard to published recognised retail and leisure data including demand/requirements from retail and leisure operators for presence in the defined town centres.
- 1.1.9 Finally, in accordance with the duty to cooperate, WYG has also worked with the Councils to contact neighbouring local planning authorities in order to identify existing retail and commercial leisure

commitments and proposals within competing centres which could have the effect of enhancing their retail and commercial leisure offer.

1.2 Structure of Study

1.2.1 Our study is structured as follows:

- [Section 2](#) summarises the current national and local planning policy context for retail and leisure development issues in South Worcestershire;
- [Section 3](#) provides a context for the Study by summarising the current and emerging key retail and leisure trends in the UK;
- [Section 4](#) sets out the key market research which informs the Study;
- [Section 5](#) analyses retail market shares and patterns in the Study Area;
- [Section 6](#) sets out our qualitative assessment/overview of the vitality and viability of town centres within South Worcestershire;
- [Section 7](#) provides our assessment of the need for further convenience and comparison goods retail floorspace over the assessment period;
- [Section 8](#) sets out our assessment of the need for further commercial leisure floorspace over the assessment period; and
- [Section 9](#) summarises our key findings and sets out our recommendations.

2.0 Planning Policy Context

2.1 Introduction

- 2.1.1 Given that this Study seeks to provide evidence to assist in the production of the Councils' new Local Plan, it is important to review existing national planning policy of pertinence to retail, leisure and town centre matters to explore the context for the Study and how it may impact upon the production of future development plan policy.
- 2.1.2 This section also provides an overview of SWDP policies, insofar they are relevant to retail and town centre matters. A more detailed review of relevant national and local planning policy is also contained at **Appendix A**.

2.2 National Planning Policy

- 2.2.1 National Planning Policy for England is contained within the National Planning Policy Framework (NPPF) (February 2019). The main theme of the NPPF is that there should be 'a presumption in favour of sustainable development'.
- 2.2.2 The NPPF recognises the need to ensure the vitality and viability of towns and cities and support the role that they play at the heart of local communities by taking a positive approach to their growth, management and adaption.
- 2.2.3 Paragraphs 86 and 89 respectively, requires local planning authorities to adopt a sequential approach and require an impact assessment (if the development is over a proportionate, locally set threshold) for retail and commercial leisure development outside of town centres which are not in accordance with an up-to-date Local Plan.

2.3 Local Planning Policy Context

- 2.3.1 The South Worcestershire Development Plan (SWDP), published in February 2016, is part of the development plan for each of the three south Worcestershire Councils.
- 2.3.2 The retail and town centre policies of relevance within the SWDP are as follows:

Policy SWDP3: Employment, Housing & Retail Provision Requirement & Delivery

- 2.3.3 Policy SWDP3 sets out how the South Worcestershire Councils will plan, monitor and manage the delivery of retail floorspace during the plan period. It supports the SWDP's overall economic strategy's focus on sustaining and regenerating the city and town centres in south Worcestershire as priority areas for regeneration and in retaining retail spending within south Worcestershire while increasing leisure and tourism spending / income.

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- 2.3.4 It is set out that provision will be made for about 50,000 sqm (net) of retail floorspace during the plan period of 2006-2030, a figure that takes into account completions and existing retail commitments.

Policy SWDP9: Creating and Sustaining Vibrant Centres

- 2.3.5 Policy SWDP9 supports the provision of appropriate retail, leisure and tourism development. Development proposals for retail and leisure facilities should demonstrate that they contribute to a comfortable, safe, attractive and accessible environment and proposals linked to the evening and night-time economy are supported provided they do not result in dead frontages or result in unacceptable impacts on neighbouring uses. Measures to secure the vitality and viability of Centres can be set out in neighbourhood plans and can include environmental enhancements and activities that seek to improve the visitor experience.

SWDP10: Protection and Promotion of Centres and Local Shops

- 2.3.6 Policy SWDP10 identifies that retail and leisure development that is appropriate in terms of location and scale will be supported where it has regard to the identified hierarchy of centres. Out of centre retailing will generally be resisted unless the sequential test is satisfied, and it will have no significant impact on the vitality and viability of a centre. The policy sets the Retail Impact Assessment threshold at 1,000sqm.
- 2.3.7 Worcester, Great Malvern, Droitwich Spa, Evesham, Pershore, Upon-upon-Severn, and Tenbury Wells are identified as City and Town Centres, the highest order of centre. Other locations throughout South Worcestershire are identified as District, Local and Neighbourhood Centres respectively.

2.4 Summary

- 2.4.1 National planning policy highlights the need to promote the vitality and viability of town centres through a town centre first approach and a defined hierarchy of centres. Applicants for main town centre uses are required to pass the sequential approach to site selection and provide a full assessment of the impact on the vitality and viability of protected centres. The SWDP follows the general trend of the most recent national policy guidance, identifying a hierarchy of centres and the town centre first approach.
- 2.4.2 As required by this commission, policy recommendations on the basis of updates to the evidence base and national guidance are provided in Section 9.

3.0 Current/Future Retail & Commercial Leisure Trends

3.1 Introduction

- 3.1.1 In order to set out the wider context for the Study and inform our advice on the need for additional retail and leisure floorspace in South Worcestershire, we summarise prevailing retail and leisure trends and the Government's response to 'transform town centres' below and provide a more detailed overview of each at **Appendix B**. Our overview draws on recognised retail and leisure data sources, including research by Experian, Global Data and Mintel.

3.2 Prevailing Retail/leisure Trends

The Changing Retail Climate

- 3.2.1 2018 was a challenging year for retailers. Deloitte report that it was the year that saw the most store closures and job losses since the 2008 global financial crisis. Retail is an industry which is under pressure with many retailers finding themselves in an uncomfortable position as margins are squeezed between weakening demand and rising costs. The key issues impacting many retailers and town centres in the UK are:

- The continued rise in internet shopping;
- Increased town centre vacancy levels & store closures; and
- The decline in investment due to the uncertainty surrounding Brexit.

The continued rise in internet shopping

- 3.2.2 The strong increase in online shopping in the past decade has lifted the share of non-store retail sales to a level where at 2018 it accounted for close to 20% of total retail sales, against a little below 5% in 2008. It is estimated that the value of internet sales in 2018 totalled some £68.1bn.

- 3.2.3 Non-store retailing is to continue to grow rapidly, outpacing traditional forms of spending. It is anticipated to continue to increase at a faster pace than total retail sales until at least 2028.

Increased town centre vacancy levels & store closures

- 3.2.4 In the first half of 2018 a net 1,123 stores disappeared from Britain's top 500 town centres compared with a 222 store loss over the equivalent period in 2017. Many retailers have found themselves struggling to pay their rents and other overheads, such as a rising minimum wage and business rates.

This together with consumers doing more of their shopping online has resulted in a large number of national retailers restructuring or going into administration.

- 3.2.5 Current trading conditions for a number of retailers are tough. Store closures/changes can result in particularly significant impacts at medium/smaller sized town centres, which tend to be the subject of higher vacancy rates, and which have also often suffered related reductions in rental levels and footfall in recent years.

Uncertainty surrounding Brexit

- 3.2.6 At the time of writing the final outcome of the Brexit negotiations remain uncertain. If an exit arrangement is finally approved by Members of Parliament, and subsequently accepted by the EU, plans will be in place to proceed with the terms of a final trade deal including a two-year transition period. However, if a deal cannot be reached and further extensions are agreed to the Brexit process the UK will continue to face uncertainty which will have an impact on investment decisions.
- 3.2.7 2019 will be an uncertain year for the UK consumer. It is difficult to predict what will happen given that so much depends on the nature of the UK's exit from the EU.

The Continued Rise of the Grocery Discounter

- 3.2.8 Shoppers have turned away from food superstores in recent years with discount grocers (principally Aldi and Lidl) benefitting from increases in their market share. The discount grocers continue to have ambitious store opening targets in the coming years whilst the 'Big Four Grocers' look to continue to develop their smaller 'top-up shopping' store formats and reconfigure/refurbish their existing stores to include concessions.

The Food & Drink Sector

- 3.2.9 In recent years, town centres have also increasingly relied upon an expanding food and drink sector to bring some vacant units back into active use. Food and drink operators now require units which are in the retail heart of a centre. However, over the last year or so there is evidence that the food and drink market is becoming saturated with numerous operators restructuring, closing outlets, or going into administration.

Other Commercial Leisure Uses

- 3.2.10 There are a number of emerging leisure concepts which are also helping to anchor retail environments, including bowling alleys, trampolining and crazy golf. These concepts can assist centres in providing a point of difference with the competition, ensure that visitors' dwell times are increased, and assist a town's evening economy. Such concepts do however require reasonably large footprint units/space which primarily due to physical constraints, town centres are not always able to provide/offer.

3.3 Governments Response to 'Transform Town Centres'

Changes in Permitted Development Rights and Use Classes

3.3.1 In October 2018 MHCLG issued a consultation document titled 'Planning Reform: Supporting the high street and increasing the delivery of new homes. The changes which the Government has now adopted (25th May 2019) to support greater diversity and footfall on the high street following the 'Planning Reform' consultation include the following amendments to the GPDO:

- A new class JA of the General Permitted Development Order (GPDO) which permits a change of use of a building from a use falling within Class A1 (shops), Class A2 (financial and professional services), or Class A5 (hot food takeaways) or from use as a betting office, pay day loan shop or launderette, to a use falling within Class B1(a) (offices).
- In Class M (residential conversion from A1 shops, A2 offices, betting or pay day load shop), A5 take-aways have been added to the pre-existing uses that can be changed to residential, together with a clarification of the retail impact assessment that is required.
- Part 4, Class D (temporary use of various business premises) has been amended by enlarging the uses to which the use of the specified business premises can be changed to include Class D1(a) (the provision of any medical or health services except the use of premises attached to the residence of the consultant or practitioner), Class D1(d) (the display of works of art (otherwise than for sale or hire)), Class D1(e) (museum), Class D1(f) (public library or public reading room), or Class D1(g) (public hall or exhibition hall). The single period of the temporary use has been extended from 2 to 3 years.

3.3.2 The regulations do not include the proposed PD right allowing upward extensions to create new housing, though the government's consultation response said it still intends to proceed with this in Autumn 2019.

Business Rate Relief

3.3.3 In his Budget the Chancellor confirmed the Government will cut business rates by a third for small town centre retailers/businesses with a rateable value of less than £50,000 for two years.

3.3.4 At the same time the Government also announced the introduction of a digital services tax from April 2020. The Government is proposing a 2% tax rate against the sales that large digital companies make in the UK.

Future High Street Fund

3.3.5 As part of the 2018 Budget, a new £675 million Future High Streets Fund was announced that is intended to assist local areas to respond/adapt to changes in their town centres. It is envisaged that the Fund will then co-fund projects such as investment in physical infrastructure and land assembly.

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- 3.3.6 A new High Streets Taskforce will also be created and funded, to support local leadership. This has two elements: helping to restore historic properties through Historic England; and (2) providing communities with resources to put historic buildings back into economic use.

3.4 Potential Impact of Trends on South Worcestershire Town Centres

- 3.4.1 The town centres in south Worcestershire continue to face a number of challenges, particularly from increasing competition from the internet, multichannel retailing, polarisation of retailing, and out-of-centre retail/leisure developments. These challenges will impact on the performance, vitality and viability and the future strategy for the town centres.
- 3.4.2 It is important that the town centres in south Worcestershire are able to respond to continued changes in the retail and leisure sector and that they provide (or continue to provide) an offer/destination which distinguishes them from competing centres and out-of-centre retail and leisure destinations.
- 3.4.3 Town Centre Strategies need to be able to support the continued development/changes in the 'high street' if they are to successfully compete. Such strategies may seek to:
- (1) provide a good mix/variety of retail and leisure uses;
 - (2) attract a mix of additional land uses beyond retail/leisure, including residential, educational, community and office uses;
 - (3) build on existing cultural/heritage/tourist attractions;
 - (4) enhance existing town centre markets and speciality retailing;
 - (5) provide a high quality shopping/leisure experience;
 - (6) provide convenient, affordable and accessible town centre parking;
 - (7) promote and encourage events in the town centre;
 - (8) embrace, and not compete against, multi-channel retailing; and
 - (9) be responsive to changes in technology (the 'digital high street').
- 3.4.4 The key purpose of Town Centre Strategies should be to seek to build on the existing individuality of centres, ensuring centres are be a focus/hub for their communities, and extend the 'dwell time' and spend of visitors/residents visiting the town centre which in turn will support the vitality and viability of the centres.

4.0 Original Market Research

4.1 Introduction

4.1.1 This study is informed by two key areas of original market research. The two key areas being:

- A Telephone Household Survey; and
- Key Stakeholder Engagement.

4.1.2 Each of the 2 key areas of market research are summarised in turn below.

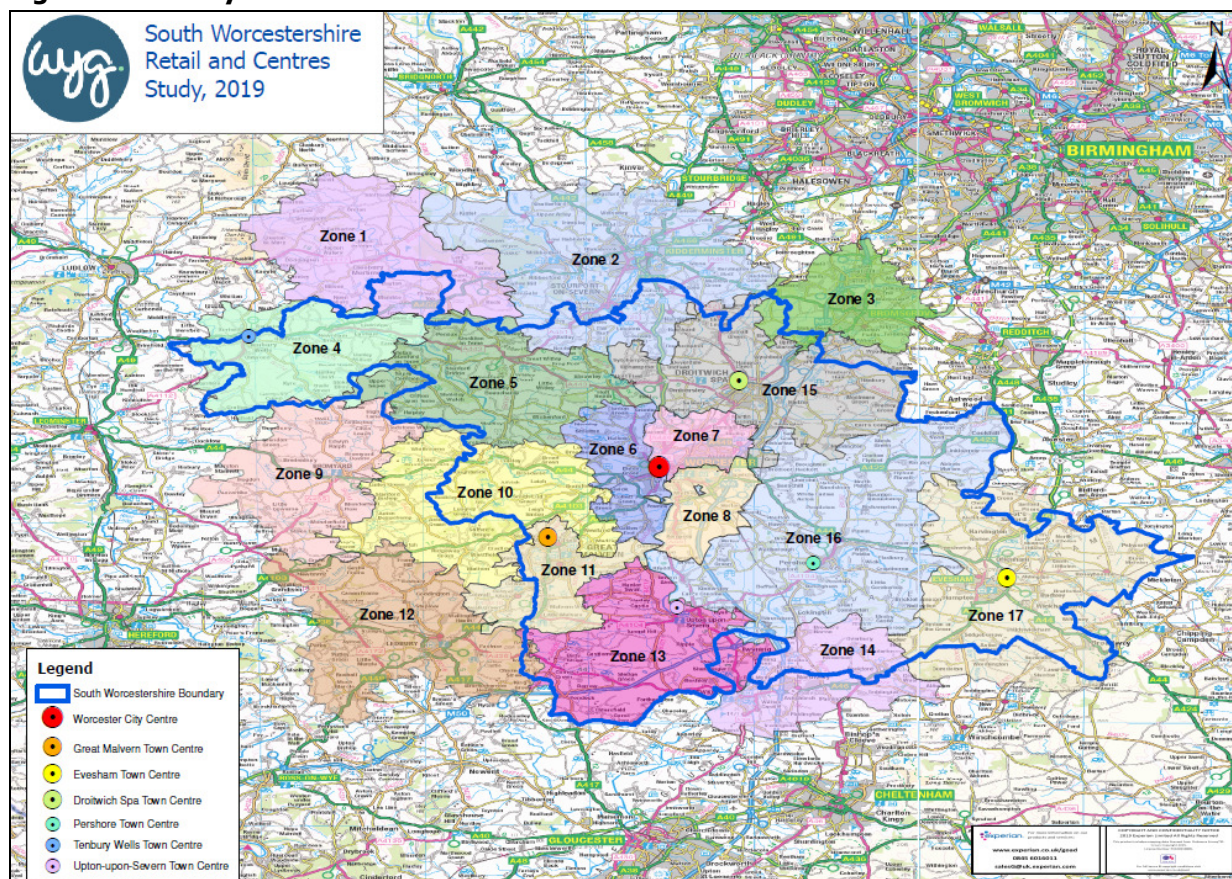
4.2 Telephone Household Survey

4.2.1 A key requirement of this Study is the detailed understanding of shopping and leisure patterns in terms of the use of centres and the identification of the centres' catchment areas. WYG commissioned specialist market researchers NEMS to undertake a comprehensive household telephone survey to identify consumers' habits and preferences in the Study Area.

4.2.2 The undertaking of original market research enables in-depth analysis at a local level and allows the evaluation of the trade draw of particular town centres. The use of specifically commissioned and tailored survey research is fundamental to identifying the likely capacity for future retail and leisure needs across the Study Area. Notwithstanding this, WYG acknowledges that there can be limitations to survey research, particularly with regard to the sample size which can be achieved, and the results should therefore be taken to be a broad indication of consumer preferences.

4.2.3 The household survey was undertaken in January/February 2019. The survey involved 1,700 households across a defined Study Area which comprises 17 separate zones. The Study Area, as shown in Figure 4.1 below, broadly covers the South Worcestershire Councils' administrative area however it extends to areas beyond to the north and west where, to some extent, residents of these areas use centres within south Worcestershire.

Figure 4.1: Study Area



4.2.4 Figure 4.2 below details the postcode sectors which make up the survey zones.

Figure 4.2 Postcodes by Survey Area

Survey Zone	Postcode Sector
1 - West of Stourport-on-Severn	DY14 0, DY14 8, DY14 9
2 - Kidderminster	DY10 1-4, DY11 5-7, DY12 1-3, DY13 0, DY13 8, DY13 9
3 - Bromsgrove	B60 1, B60 2, B60 3, B61 0, B61 7, B61 8, B61 9
4 - Tenbury Wells	WR15 8
5 - South Worc Rural North West	WR6 6
6 - Worcester West	WR2 6, WR2 5, WR2 4
7 - Worcester North	WR1 1, WR1 2, WR1 3, WR3 7, WR3 8, WR4 0, WR4 9
8 - Worcester East	WR5 1, WR5 2, WR5 3, WR99 1
9 - Bromyard	HR7 4
10 -South Worc Rural West	WR6 5, WR13 5
11 - Great Malvern	WR14 1, WR14 2, WR14 3, WR14 4, Part WR13 6
12 - Ledbury	HR8 1, HR8 2
13 - Upton-upon-Severn	WR8 0, GL20 6, Part GL19 3, Part GL19 4 and Part W13 6
14 - Tewkesbury	GL20 5, GL20 7, GL20 8
15 – Droitwich Spa	WR9 0, WR9 7, WR9 8, WR9 9, B60 4, Part B96 6 and Part B97 5
16 - Pershore	WR7 4, WR8 9, WR10 1, WR10 2, WR10 3, Part B49 5 and Part B96 6
17 - Evesham	WR11 1-4, WR11 7, WR11 8, WR12 7, Part B50 4 and Part CV37 8

4.2.5 The results of the household survey, *inter alia*, are utilised to calculate the expenditure claimed by each existing retail facility within the Study Area, a process which is considered in Section 7.

4.3 Key Stakeholder Workshop/Engagement

4.3.1 In order to inform the qualitative analysis in this study we have engaged with key stakeholders in the three Council areas. The objective of the key stakeholder engagement was to gather:

- views on any strengths, weaknesses, opportunities, threats in centres/retail and leisure provision; and
- suggested improvements to the defined centres.

4.3.2 The city/town centres on which information was being sought on were: (1) Worcester; (2) Droitwich Spa; (3) Evesham; (4) Malvern; (5) Pershore; (6) Tenbury Wells; and (7) Upton-upon-Severn.

4.3.3 In consultation with the three Councils key stakeholders, including key business owners/ groups, and relevant community groups, were invited to a stakeholder workshop on the morning of the 8th April 2019. Overall some 14 attended the workshop event.

4.3.4 The workshop was arranged so views from key stakeholders on the following particular areas could be sought:

- Any strengths in centres retail, leisure provision;
- Any weaknesses in centres retail and leisure provision;
- Potential threats to centres;
- Potential opportunities for centres; and
- Suggested improvements to the defined centres in South Worcestershire.

4.3.5 A feedback form was emailed to those stakeholders that couldn't attend the workshop seeking their views on the above.

4.3.6 Separate engagement has also taken place with a number of other stakeholders including West Mercia Police, Worcestershire LEP, Worcester BID, and University of Worcester. A feedback form was also emailed to each of these stakeholders.

4.3.7 In addition to the above, engagement has also taken place with a number of chain store operators (or agents acting on their behalf) to understand current demand/interest in town centres and potential opportunities in Worcester and other towns.

4.3.8 In accordance with the duty to cooperate, WYG has also worked with the three Councils to contact neighbouring local planning authorities in order to identify existing retail and leisure commitments and proposals within competing centres which could have the effect of enhancing their retail and leisure offer. The councils we have contacted are:

- Birmingham City Council;
- Cheltenham Borough Council;
- Tewkesbury Borough Council;
- Herefordshire Council;
- Gloucester City Council;
- Wyre Forest District Council;
- Forest of Dean District Council;
- Shropshire Council;
- Stratford-on-Avon District Council;
- Cotswold Council;
- Bromsgrove District Council; and
- Redditch Borough Council.

4.3.9 Details on relevant existing commitments in the neighbouring authority areas (where provided) are summarised in Section 5.

4.3.10 A summary of the stakeholder and 'duty to cooperate' engagement together with 'key feedback' from stakeholders is provided at **Appendix C**.

5.0 Retail Market Share Analysis and Retail Provision

5.1 Introduction

5.1.1 Drawing on the findings of the household telephone survey this section summarise the convenience and comparison goods retail market share patterns within the Study Area. In order to provide some context for these market share patterns this section firstly:

- provides an overview of the socio demographic context of the South Worcestershire area;
- sets out the sub-regional centre hierarchy;
- summarises the existing retail provision in South Worcestershire;
- summarises existing retail facilities within the main competing centres.

5.1.2 A detailed analysis of the convenience and comparison goods retail market share patterns within the Study Area is provided at **Appendix D**. An analysis of existing leisure provision and leisure market share patterns is provided as part of the commercial leisure need assessment set out in **Appendix I**.

5.2 Socio Demographic Context of the South Worcestershire Area

5.2.1 A population profiling exercise has been undertaken utilising the Experian Mosaic database to establish the socio demographic profile of the three Council areas and the South Worcestershire area. A national UK average is also provided so as to enable a comparative assessment to be undertaken. The breakdown and definition of each Experian Mosaic group is provided at **Appendix E**.

Figure 5.1 – Experian Mosaic Profiling (%)

Mosaic Group	South Worcestershire	UK Average
Population (Adults 18+)	248,614	-
A: City Prosperity	0	4
B: Prestige Positions	8	7
C: Country Living	20	7
D: Rural Reality	11	7
E: Senior Security	9	8
F: Suburban Stability	6	6
G: Domestic Success	8	8
H: Aspiring Homemakers	10	9
I: Family Basics	6	7
J: Transient Renters	5	6
K: Municipal Challenge	1	6
L: Vintage Value	5	6
M: Modest Traditions	3	5
N: Urban Cohesion	1	5
O: Rental Hubs	5	8
U: Unclassified	1	1
Total	100	100

Source: Experian Mosaic Report

Notes: Population derived from Mosaic report – 2017 estimate Adults 18+ / Figures may not add due to rounding

5.2.2 The Experian Mosaic results highlight that when compared to the UK average South Worcestershire contains:

- a broadly similar proportion of residents within the 'Prestige Positions' (families with substantial income/retired in sizeable homes/upmarket suburban homes/high achieving).
- a higher proportion of population in the 'Rural Reality' (people living in expanding developments/affordable village homes/inexpensive housing/removed communities within rural locations) and 'Country Living' (prosperous families and older households/retired people living in country houses/small countryside villages) categories;
- a broadly similar proportion of 'Aspiring Homemakers' (younger and settled families in affordable/modest homes/fashion conscious young singles/partners setting up home/young singles renting in family suburbs);
- A lower proportion fall within the 'Vintage Value' (dependent elderly renters/those in specialist accommodation/single elderly low value homeowners/longstanding elderly social renters) than the national average (5% vs 6%);
- a broadly similar proportion of those falling within the 'Family Basics' category (stable families renting from social landlords/families where expenditure can exceed income/ younger families with budget home/families living in areas of high deprivation) and the 'Domestic Success' category (affluent families in upmarket housing, well qualified singles, families in modern detached homes/traditional mid-range suburbs); and

- a much lower proportion of residents within the 'Municipal Challenge' category (long term renters/older social renters/hard-pressed singles/multi-cultural household of social/low cost flats).

5.2.3 The Mosaic results generally highlight that south Worcestershire has a higher proportion of residents within the rural/country categories and fewer residents who are less well off.

5.2.4 The socio demographics of a catchment area of a town will, in part, have an impact on the quantum and type of retail and leisure demand in a town centre.

5.3 Sub-Regional Centre Rankings

5.3.1 Figure 5.2 illustrates the position of the principal centres within the hierarchy of centres based on the Venuescore's UK Shopping Venue Rankings. The index ranks over 3,000 retail venues within the UK (including town centres, stand-alone malls, retail warehouse parks and factory outlet centres) based on the current retail provision. Towns and major shopping centres are rated using a scoring system which takes account of the presence in each location of multiple retailers – including anchor stores, fashion operators and non-fashion multiples. The rankings in the table represent the position of the centres at the time of the most recent Rankings as well as competing surrounding centres. A more detailed tabulation of retail rankings data is also provided which shows the historic performance of the centres in the preceding 2010-11 Rankings.

Figure 5.2: Sub-regional Centre Rankings

Centre	Classification	2010-11 Rank	2016-17 Rank	Change in Rank 2011-2017
Birmingham	Major City	3	4	-1
Cheltenham	Major Regional	26	32	-8
Worcester	Major Regional	78	55	+23
Hereford	Regional	113	71	+42
Gloucester	Regional	121	101	+20
Redditch	Regional	175	169	+6
Stratford-upon-Avon	Sub-Regional	172	185	-13
Evesham	District	403	620	-217
Droitwich	District	760	781	-21
Great Malvern	District	1,168	968	+200
Ledbury	Minor District	1,650	1,233	+417
Pershore	Local	1,724	3,133	-1,409

Source: VenueScore 2010 and 2016 Rankings

5.3.2 VenueScore classifies Worcester as a Major Regional Centre and since 2010-11, the City Centre's ranking has improved, gaining 23 places. Cheltenham is also classified as a Major Regional Centre. Located approximately 40km south of Worcester, its town centre ranks above Worcester but it has seen a decrease in rankings, falling 8 places since 2010-11.

- 5.3.3 Both the centres of Evesham and Droitwich Spa are classified as District Centre and both have seen a decrease in their rankings. Evesham has fallen some 217 places between 2010-11 and 2016-17, while Droitwich Spa has dropped 21 places. Great Malvern is also classified as a District Centre but in contrast to Evesham and Droitwich Spa, it has seen an increase in its ranking by 200 places from 2010-11.
- 5.3.4 Pershore is classified as a Local Centre and it has seen the biggest fall in rankings of the centres in South Worcestershire, dropping 1,409 places between 2010-11 and 2016-17.
- 5.3.5 As noted earlier, the Rankings are reflective of the presence of national multiple retailers in a particular centre and are therefore a more accurate barometer of the performance of larger centres. Accordingly, towards the lower end of the Rankings, the importance of a centre can be overlooked or amplified based on whether a handful of national multiples are present or not.

5.4 Summary of Existing Retail Provision in South Worcestershire

- 5.4.1 Provided below is a summary of existing retail provision in south Worcestershire.

Worcester

- 5.4.2 Worcester City Centre is the principal shopping and leisure location in south Worcestershire. The city is located centrally within the study area and is some 50km south of Birmingham, and 40km north of Cheltenham. The City Centre provides a mix of retail, service and leisure facilities including some 103,130 sqm gross retail floorspace, 7,270 sqm retail service floorspace, 32,220 sqm leisure service floorspace and 5,720 sqm financial and business services floorspace (source: Experian Goad Survey).

Figure 5.3: Out-of-Centre Retail Provision in Worcester

	Distance from Worcester City Centre	No. of Units	Vacant Units	Key Occupiers
Elgar Retail Park, Worcester	3km	9	1	Homebase, Dunelm, Next Home, Halfords, Hughes, KFC, Argos, Homesense
Blackpole Retail Park, Worcester	3km	7	0	Pets at Home, Carpet Right, Oak Furnitureland, Currys PC World, Harvey's, Benson's for beds, McDonalds, Lidl, M&S Simply Food, Sainsbury's
St Martin's Quarter	400m	12	3	Sports Direct, Avant Garde, Barnado's, Costa, Poundland, Ladbroke's, B&M, Asda, Independent, Aldi
Tallow Hill Retail Park	750m	9	1	Wickes, Office Outlet, Just for Pets, Home Bargains, Majestic Wines, Subway, Carphone Warehouse, Pizza Hut
Tybridge Street	850m	3	0	Aldi, Homebase, McDonalds
Bath Road	3.3km	2	0	Aldi, B&M
Lidl, Newtown Road	1.4km	-	-	-

Evesham

- 5.4.3 Evesham is located in Wychavon District in east of south Worcestershire. It's town centre is the second largest in the study area and accommodates 43,900sq m commercial floorspace along High Street, Vine Street, Bridge Street and within the Riverside Shopping Centre. Of the commercial floorspace within the town centre, 15,030sq m is occupied by comparison goods retailers, 8,590sq m by leisure service uses and 5,200sq m of convenience goods floorspace. In addition, 4,370sq m of floorspace is occupied by financial and business services, and 3,340 sqm of floorspace by retail service providers.

Figure 5.4: Out-of-Centre Retail Provision in Evesham

	Distance from Evesham Town Centre	No. of Units	Vacant Units	Key Occupiers
The Valley	3.4km	21+		Boardman Bikes, Fatface, Mountain Warehouse, Coffee #1, Blue Diamond Garden Centre, Regatta, ProCook, Cotton Traders, Jane Plum Interiors, Pavers, Klass, Julian Charles, The Works, Grape Tree, Leading Labels, Roman, Absolute Silver, Crafter's Companion, Allens Caravans, Cotswold Needlecraft, Outdoor and Country
Four Pools Retail Park	2km	9	2	Pets at Home, Halfords, The Range, Frankie & Benny's, Morrisons, Currys PC World, B&Q
Evesham Shopping Park	1.4km	5	0	Next, Boots, Marks & Spencer, Poundstretcher, and Argos
Tesco, Worcester Rd	1.4km	-	-	-
Lidl Broadway Road	2.2km	-	-	-

Droitwich Spa

- 5.4.4 Located in the north of Wychavon District, Droitwich Spa is some 10km to the north of Worcester. The town centre accommodates circa 30,800sq m commercial floorspace of which comparison goods retailers occupy the largest amount (10,870 sqm of floorspace). The town centre also provides 6,950sq m gross of convenience retail floorspace together with 4,110sq m gross leisure floorspace, 2,670 sq m retail service floorspace and 2,490 sq m financial and business service floorspace (source: Experian Goad Survey).

Figure 5.5: Out-of-Centre Retail Provision in Droitwich

	Distance from Droitwich Town Centre	No. of Units	Vacant Units	Key Occupiers
Droitwich Spa Retail Park	1.3km	5	1	B&M, Pets at Home, DFS, Aldi, Lidl
Webbs of Wychbold	4.7km	-	-	-

Great Malvern

- 5.4.5 Great Malvern is located within Malvern Hills District, 15km to the south west of Worcester. Situated at the foot of the Malvern Hills, the town is a popular destination for tourists with St Ann's Well, Priory Park, The Priory, Malvern Theatre Complex and Abbey Gateway all being key attractors.
- 5.4.6 The Town Centre provides a total of 25,970 sqm commercial floorspace, 8,360sq m of which is occupied by comparison goods units. Of the remaining commercial floorspace within the town centre, 8,140sq m is occupied by leisure service uses, 3,910sq m by convenience goods retailers, 3,240 sq m by financial and business service providers, and 1,430 sq m by retail service providers.

Figure 5.6: Out of Centre Retail Provision in Malvern

	Distance from Great Malvern Town Centre	No. of Units	Vacant Units	Key Occupiers
Malvern Shopping Park	4km	20	0	Poundland, M&S, Halfords, £-Stretcher, Shoezone, New Look, Next, Argos, Pets at Home, Matalan, Boots, Mountain Warehouse, Specsavers, Costa, McDonalds
Morrisons, Roman Way	4km	-	-	-

Pershore

- 5.4.7 Pershore, located approximately 10km west of Evesham and 15km to the east of Worcester, has the smallest town centre within Wychavon District. The town centre itself extends along the length of the High Street and it also incorporates Broad Street to the south. Some 142 commercial units are provided in the town centre occupying 21,950sqm of floorspace. Leisure service operators occupy the most floorspace in the town centre at 6,950sqm, closely followed by comparison goods at 6,790sqm. The town centre also accommodates 4,950sqm convenience goods floorspace, 1,620 sqm floorspace given to financial and business services, and 1,330 sqm of retail service floorspace.

Figure 5.7: Out of Centre Retail Provision in Pershore

	Distance from Pershore Town Centre	No. of Units	Vacant Units	Key Occupiers
Birlingham Nurseries & Garden Centre	4km	-	-	-

Tenbury Wells

- 5.4.8 Tenbury Wells is a small town in the north west of Malvern Hills District. The town is set in a rural location some 34km from Worcester, its nearest large settlement in South Worcestershire. Tenbury Wells Town Centre accommodates 89 commercial, retail and leisure units. 26 units are occupied by comparison goods retailers, 21 by leisure service providers, 16 by providers of retail services, 12 by financial and business services and 9 by convenience goods retailers.

Figure 5.8: Out of Centre Retail Provision in Tenbury Wells

	Distance from Tenbury Wells Town Centre	No. of Units	Vacant Units	Key Occupiers
Burford House Garden Store	2km	-	-	-

Upton-upon-Severn

- 5.4.9 Upton-upon-Severn has the smallest town centre in South Worcestershire with just 79 commercial, leisure and service units. The town boasts an attractive riverside setting on the banks of the River Severn and is well known for hosting several events each year including jazz, folk and blues festivals. Key features of the town centre include 'The Pepperpot' bell tower, the Tudor House Museum and the Heritage Centre.
- 5.4.10 The town centre accommodates circa 9,720sqm of commercial, leisure and service floorspace, the largest proportion of which is occupied by leisure uses at 3,970sqm. Comparison goods retailers occupy 2,460 sqm, 1,280sqm by retail service providers 1,130 sqm by convenience goods retailers and 490sqm by financial and business services.

5.5 Surrounding Main Large Centres

- 5.5.1 The town centres within south Worcestershire do not operate in isolation. It is important to understand the nature of the existing (and emerging) retail offer in the surrounding 'competing' centres given that planned improvements could potentially materially impact upon shopping patterns, future performance and overall vitality and viability of the centres.
- 5.5.2 The surrounding centres which the household survey shows have an influence on shopping patterns in south Worcestershire are Birmingham, Cheltenham, Tewkesbury, Bromsgrove, Kidderminster and Hereford.

Birmingham

- 5.5.3 Birmingham is Britain's 'Second City' and the social, cultural, financial and commercial centre of the West Midlands. The City Centre has excellent transport connections with three major railway stations and is within easy reach of the strategic motorway network, consequently the city has a major influence throughout the wider region. Located to the north of South Worcestershire, the city is approximately 45 kilometers from Worcester by road, and 35 kilometers to the north east of Droitwich.
- 5.5.4 Birmingham is ranked in the top 5 of Venuescore's UK Shopping Venue Rankings and it is therefore a major retail and leisure destination. The City Centre has two main shopping centres, The Bullring and Grand Central which together provide over 200 retail and leisure units, as well as a number of smaller shopping centres such as The Mailbox and the Great Western Arcade which offer a more specialised retail/leisure experience. The City Centre has recently seen the opening of the largest Primark store in Europe.

Cheltenham

- 5.5.5 Cheltenham is located to the south east of South Worcestershire, approximately 27km from Evesham, and 40km from Worcester. The town is well known for its Regency architecture and is a popular destination for tourists. Major attractions in Cheltenham include Cheltenham Racecourse, Cheltenham Art Gallery & Museum and the numerous annual music and literature festivals.
- 5.5.6 The Town Centre is identified as a 'Key Urban Area' and alongside Gloucester City Centre, sits at the top of the hierarchy of centres within the adopted Joint Core Strategy (between Gloucester City Council, Cheltenham Borough Council and Tewkesbury Borough Council). Over the JCS plan period to 2031 provision is made for 45,494 sqm comparison goods and 1,805 sqm convenience goods provision.

Hereford

- 5.5.7 Hereford is located approximately 44km to the west of Worcester and 34km from Great Malvern. The Hereford Local Plan Core Strategy confirms Hereford as the Principal Centre within Herefordshire and sitting at the top of the retail hierarchy. The adopted Herefordshire Core Strategy recognises Hereford as the dominant centre for shopping and services however it also identifies that the Town Centre lacks a wide range of comparison goods shopping and leisure facilities meaning that it struggles to compete with the neighbouring centres of Worcester and Gloucester. Notwithstanding this, we note that over recent years Hereford has risen up through the national rankings (see Figure 5.2).

Tewkesbury

- 5.5.8 Tewkesbury is identified in the adopted Joint Core Strategy as a Market Town, sitting beneath Gloucester City Centre and Cheltenham Town Centre in the settlement hierarchy. It is a rural market town and lies at the junction of the River Severn and River Avon. Some 3,150 sq m of comparison goods floorspace is planned for over the plan period to 2031, and 1,025 sq m convenience goods. The planning permission for a new factory outlet centre and garden centre at Junction 9 of the M5 will absorb all this available capacity.

Bromsgrove

- 5.5.9 Bromsgrove is approximately 26km north of Worcester. The town is the largest settlement within Bromsgrove District and it sits at the top of the District's settlement hierarchy as the Main Town.
- 5.5.10 Although Bromsgrove Town Centre is the main retail destination within the District, the Bromsgrove District Plan acknowledges that not all local residents use the town as the primary shopping destination. An update to the Council's retail study was published in October 2013 and identified the Town Centre as accommodating 50,623 sqm of floorspace across 348 units. The study update confirmed that there was a slight oversupply of convenience floorspace in the Town Centre at that time, and a requirement of 16,300 sqm of comparison floorspace to 2030.

Kidderminster

- 5.5.11 Kidderminster in Wyre Forest District lies some 25km north of Worcester. The town is a 'Strategic Centre' and sits at the top of the settlement hierarchy of Wyre Forest District.
- 5.5.12 Kidderminster has a compact Town Centre with the main shopping area focussed upon the pedestrianised High Street, Vicar Street, Market Street and Weavers Wharf Area, and there are two covered shopping centres in the town.
- 5.5.13 The latest retail and commercial leisure needs study undertaken by Boyer Development Economics in May 2016 identified that Kidderminster Town Centre is in reasonable health, however some physical regeneration work would help to address a high proportion of vacant units which presently detract from the vitality and viability of the town.

5.6 Shopping Patterns

- 5.6.1 This section contains a summary of the convenience and comparison-goods shopping patterns for each city and town centre in south Worcestershire. Both main and top-up convenience food shopping patterns have been analysed, as well as combined comparison-goods shopping patterns. As noted previously a detailed assessment of shopping patterns is set out at **Appendix D**.

Worcester

- 5.6.2 The vast majority of main food shopping trips from Worcester are retained within the city. Reflecting a lack of medium and large foodstores in the City Centre, most of these trips are made to stores elsewhere within the city with Tesco at St Peters the most popular destination, and Sainsbury's at St John's, Tesco at Warndon and Aldi at Tybridge Street also popular stores.
- 5.6.3 In terms of top-up food shopping, the vast majority of shopping trips from those in Worcester are again retained within the city. Compared with main-food shopping trips though, a greater proportion of top-up food shopping is undertaken in the City Centre with Iceland at Crowngate Shopping Centre proving the most popular destination here. Outside of the City Centre, the Tesco Store at St Peter's, the Sainsbury's store at St John's and the Tesco at Mill Wood Drive, Warndon are popular stores.
- 5.6.4 Retail facilities in Worcester attract shopping trips from across south Worcestershire and capture nearly a quarter of all comparison goods shopping trips from the study area. 12% of the market is captured by stores in the City Centre, 10% by those in out-of-centre locations, and 1% by those in District and Local Centres.

Evesham

- 5.6.5 90% of all main food shopping trips made by those in Evesham are retained within the town and foodstores in Evesham also attract shoppers from the surrounding area including from Pershore where just under half of the market share is captured.
- 5.6.6 Of the foodstores in the Town Centre, Aldi on Swan Street is the most popular, however, out-of-centre stores attract more trips overall. Of these, Morrisons on Davies Road, Tesco on Worcester Road and Lidl on Broadway Road, are the most popular main food shopping destinations.
- 5.6.7 Top-up food shopping patterns in Evesham are similar to main-food shopping patterns, although the Co-op and Waitrose Stores in the Town Centre attract more shopping trips. Stores outside of the Town Centre again attract the most visits with Morrisons the most popular destination.
- 5.6.8 Retail facilities in Evesham retain around half of the comparison-goods market share from those in the local area, with a 3:2 split of the market captured by Town Centre and out-of-centre stores respectively. Aside from facilities in Worcester, shops in Cheltenham are shown to attract trips from Evesham as well as facilities in Redditch and Stratford-on-Avon, albeit to a much lesser extent.

Droitwich Spa

- 5.6.9 Just under half of main food shopping trips from those in Droitwich Spa are made to stores in the Town Centre where both Morrisons and Waitrose have large foodstores. Outside of the Town Centre, Aldi on Kidderminster Road is also a popular destination. Survey responses indicate that a small number of main-food shopping trips from the surrounding area are made to Droitwich including from Tenbury Wells, Bromyard and areas to the West of Stourport-on-Severn.
- 5.6.10 As with main-food shopping, the Morrisons and Waitrose stores in the Town Centre are the most popular top-up food shopping destinations in Droitwich Spa, although a greater proportion of top-up food shopping trips are made to stores outside of the Town Centre than with main food shopping trips.
- 5.6.11 Retail stores in Droitwich Spa Town Centre retain just under a third of the comparison retail goods market share, while shopping facilities in Worcester attract a similar proportion of trips.

Malvern

- 5.6.12 Morrisons on Roman Way is the most popular main-food destination from those in the town, while the Waitrose in the Town Centre is also popular. Overall, foodstores in Malvern retain the majority of the main-food shopping market share from the town and they are also shown to draw trips from the surrounding area, notably Upton-upon-Severn and from the west of Worcester.
- 5.6.13 Within Great Malvern Town Centre, Waitrose is the most popular top-up food shopping destination, attracting shopping trips from Ledbury and Upton-upon-Severn as well as from Malvern itself. Foodstores in Malvern's District Centres, including the Co-op at Barnard's Green and Lidl in Malvern Link are also popular. In terms of the out-of-centre facilities, Morrisons off Roman Way and Marks & Spencer at Malvern Retail Park are the most popular, attracting trips from across Malvern and also from further afield.
- 5.6.14 In terms of comparison goods shopping patterns, facilities in Great Malvern Town Centre retain a greater proportion of the market share from residents of the town than out-of-centre facilities. Out-of-town retail facilities attract a greater proportion of shoppers from elsewhere however including those from Worcester, Ledbury and Upton-upon-Severn. 23% of all comparison shopping trips from those in Malvern are made to Worcester, demonstrating its influence on the town.

Pershore

- 5.6.15 Although Pershore has a large Asda store in its Town Centre, only around a fifth of the main food shopping market is retained within the town with foodstores in both Evesham and Worcester having an influence on food shopping patterns. Consequently, convenience food retailers in Pershore have a very limited influence on shopping patterns in neighbouring areas.

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- 5.6.16 Just under half of top-up food shopping trips are retained within Pershore with the most popular destination remaining Asda at King George's Way in the Town Centre. Again, facilities in the town have very little influence on shopping patterns in other areas.
- 5.6.17 Comparison retail facilities in Worcester and Evesham have a large influence on those in Pershore, with each attracting a greater proportion of comparison goods shopping trips from the town than those in Pershore itself, which only captures 13% of the market. Responses to the survey indicate that retailers in Pershore do not attract any visits from any other survey zones for comparison goods shopping.

Tenbury Wells

- 5.6.18 Reflecting its relatively isolated rural location, over 65% of main food shopping trips from those in Tenbury Wells are retained within the town. Most of these trips are made to the large Tesco in the Town Centre, while the Nisa store on Market Square is also relatively popular. Similarly, a high percentage (84%) of top-up-food shopping trips are retained within the town.
- 5.6.19 Shops in Tenbury Wells Town Centre retain just over a quarter of the comparison goods market share from its survey zone, with facilities in Kidderminster, Hereford, Worcester and Leominster shown to have an influence on the town.

Upton-upon-Severn

- 5.6.20 Upton-upon-Severn is small in size and it lacks a large foodstore. Consequently, the town only retains a very small proportion of main food shopping trips (7%) and it does not attract any trips from any other surrounding towns. Foodstores in Malvern and Tewkesbury are the most popular main-food destinations from the town.
- 5.6.21 Upton-upon-Severn retains just under a third of top-up food shopping trips, with the Co-op on Old Street attracting the vast majority of the market in the town.
- 5.6.22 Given the small size of Upton-upon-Severn and the limited range of comparison goods retailers in the town, only 5% of the comparison-goods shopping trips are retained by stores in the town. Retailers in Malvern attract just under a quarter of shopping trips from Upton, Cheltenham attracts a fifth, while Worcester and Tewkesbury also attract a significant proportion of visits.

Internet

- 5.6.23 The household survey results identify that books, CDs and DVDs are the most commonly bought items online, alongside small and large electrical goods and toys, games, bicycles & other sporting or recreational goods. Chemist goods and DIY items are the least common comparison goods to be purchased online.

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- 5.6.24 For convenience food shopping, between 1% and 13% of respondents from each survey zone did their shopping online.
- 5.6.25 In terms of how items purchased online are received, results show that all convenience goods were received by home delivery, over 90% of comparison goods were home delivered, while purchases of clothing & footwear, and small electrical goods were most commonly collected from stores.

5.7 Summary

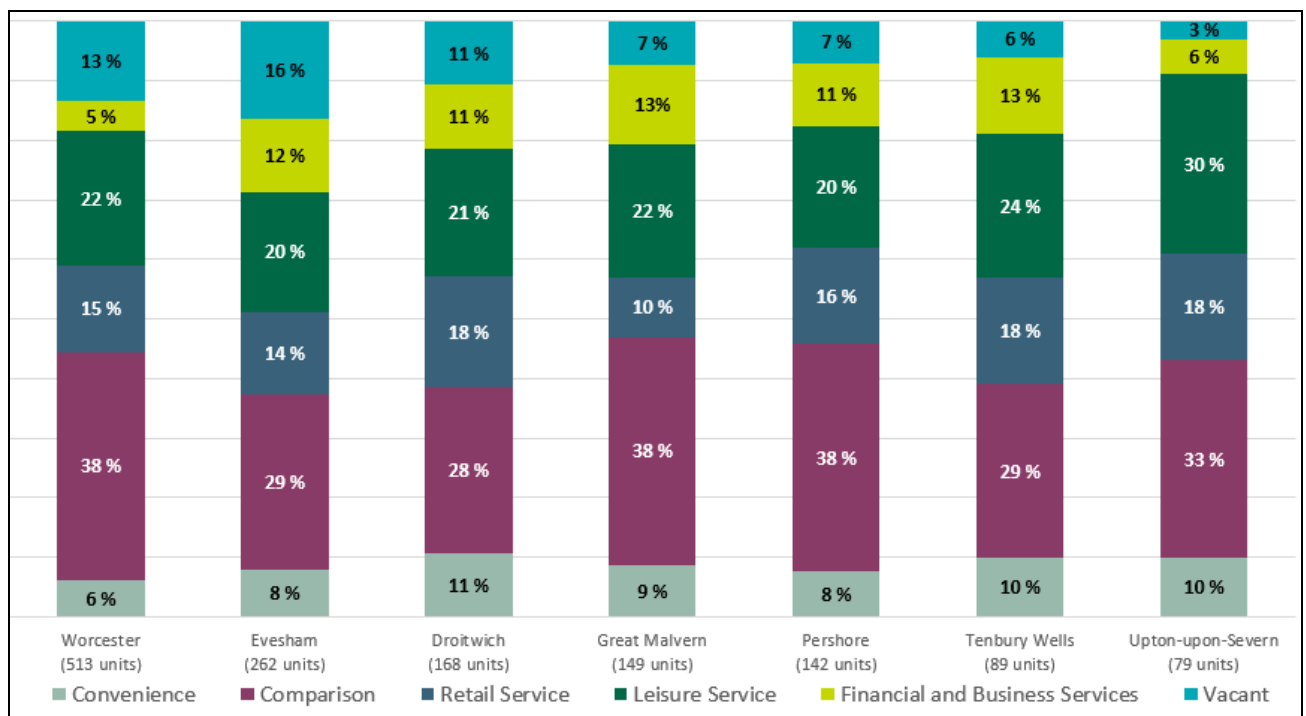
- 5.7.1 The above sections set out the existing retail provision within south Worcestershire, surrounding competing centres and an assessment of the shopping patterns of residents within the study area. The subsequent sections provide health checks and our qualitative assessment of any retail related deficiencies within each of the centres.

6.0 Qualitative Health Check Assessments of Centres

6.1 Introduction

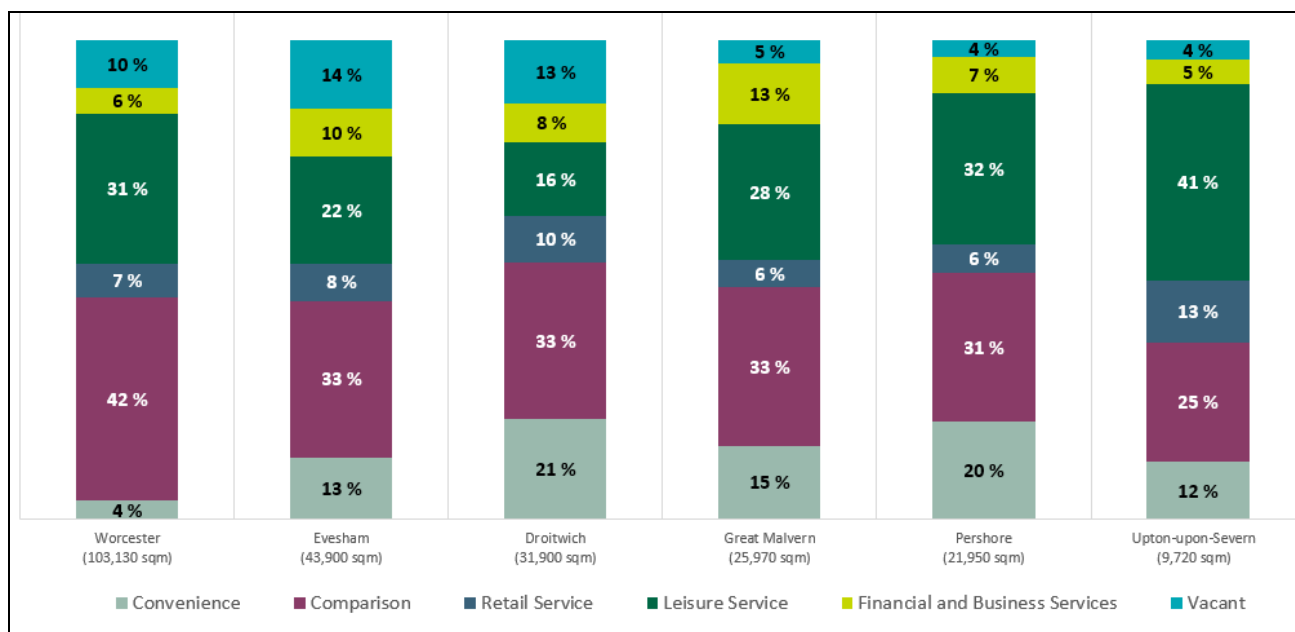
- 6.1.1 This section provides a summary of the detailed qualitative health check assessments undertaken for each of the 7 centres which can be found at **Appendix F**.
- 6.1.2 The health check assessments are based on indicators published in the NPPG and are used to assess the vitality and viability of each centre. Details of the criteria within the NPPG and the methodology utilised for the health checks is contained at **Appendix G**.
- 6.1.3 Figures 6.1 and 6.2 provide a summary of the composition of each centre in south Worcestershire, breaking down the proportion of units and floorspace occupied by each Experian Goad town centre use category.

Figure 6.1 – Composition of each centre by percentage of commercial units



Source: Experian Goad Surveys

Figure 6.2 – Composition of each centre by percentage of commercial floorspace



Source: Source: Experian Goad Surveys

Notes: No data available for Tenbury Town Centre

6.1.4 It is shown that in general, the proportion of convenience goods floorspace across the centres is higher than the proportion of convenience goods units. Conversely, the proportion of retail service units across the centres is consistently higher than the proportion of floorspace they occupy. Retail service units such as hairdressers tend to be small in size, while convenience retailers include supermarkets which occupy very large units.

6.1.5 Worcester City Centre is shown to have the highest proportion of comparison floorspace and joint highest proportion of comparison goods units with Great Malvern Town Centre and Pershore Town Centre. Upton-upon-Severn has the lowest proportion of vacant units and the joint lowest proportion of vacant floorspace across south Worcestershire.

6.2 Worcester City Centre

6.2.1 Our health check assessment of Worcester City Centre finds that overall it displays reasonable levels of vitality and viability. We consider that the principal strengths, weaknesses, opportunities and threats to the centre are as follows:

Strengths and Opportunities

- The city has a strong comparison goods offer with a high representation of top national retailers.
- There is generally a pleasant and attractive environment in the City Centre. Opportunities for improvement have been recognised and improvement schemes are being, or will be, delivered at the Shambles and Angel Place/Friary Walk.

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- Retail services have improved over recent years and there are a good range of leisure facilities in the City Centre.
 - Opportunities exist to make improvements in access to riverside and canalside locations.
 - There is an active and engaged BID team.

Weaknesses and Threats

- Concentration of vacant units at Reindeer Court and Friary Walk.
- The bus station is presently unwelcoming. As a gateway into the city, it should be a focus for improvement/enhancement.
- Lower footfall levels were monitored towards the edges of the City Centre, particularly at the south of Friar Street and at Angel Street/Angel Place.
- Angel Street has a generally poor environmental quality.
- Competition from regional centres, in particular Birmingham and Cheltenham, is likely to increase as a result of recent/future investment in these centres.

6.3 Evesham Town Centre

6.3.1 Our health check findings identify that Evesham Town Centre is considered to display reasonable levels of vitality and viability. It identifies the strengths, opportunities, weaknesses and threats to the town centre as follows:

Strengths and Opportunities

- Good financial and business service offer.
- Compact and walkable main shopping area.
- Good public transport links.
- Travel improvements may help reduce congestion and encourage more people to walk and cycle.
- The redevelopment of Riverside Shopping Centre would provide a significant opportunity to improve leisure service offer and/or bring other non-retail uses into the town centre.

Weaknesses and Threats

- Vacancy rates are well above the national average and are particularly high in the Riverside Shopping Centre.
- The comparison goods sector is not particularly strong and has weakened over the past 5 years.
- The highway network, including the A46(T) is congested.

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- More out-of-centre retail/leisure development may weaken the comparison goods sector further.

6.4 Droitwich Spa Town Centre

6.4.1 Droitwich Spa Town Centre is considered to display reasonable levels of vitality and viability with identified strengths, opportunities, weaknesses and threats as follows.

Strengths and Opportunities

- The Town Centre is accessible by all modes of travel which is aided by flat topography and good parking provision.
- The Town Centre is well provided for in terms of financial and business services.
- The Town Centre has a strong convenience goods provision.
- There is a low overall crime rate.
- Redevelopment of the Raven Hotel will help to revitalise this area of the Town Centre.

Weaknesses and Threats

- Under-provision of leisure services in the Town Centre, especially those serving the 'evening economy'.
- Railway station is poorly linked to the Town Centre.
- Areas such as Ombersley Road and St Andrews Street would benefit from additional investment.
- The vacant Raven Hotel does not contribute to the vitality and viability of the centre. Its longstanding vacancy suggests it may not be attractive to investors which may result in the former hotel remaining vacant for the foreseeable future.

6.5 Great Malvern Town Centre

6.5.1 Our detailed vitality and viability assessment of Great Malvern Town Centre finds that it displays healthy levels of vitality and viability:

Strengths and Opportunities

- The Town Centre has an attractive built environment with well-tended public spaces.
- The town centre is a popular tourist attraction and provides a number of non-retail and leisure attractors including the theatre complex and the adjacent Malvern Hills Area of Outstanding Natural Beauty.
- The centre has low vacancy levels and provides an attractive independent offering which caters to both visitors and local residents.

Weaknesses and Threats

- Steep topography makes access difficult for those with mobility issues.
- Car parking provision struggles to meet demands at peak times.
- Expansion of retail provision at Malvern Shopping Park, Malvern Link and Barnards Green is a potential threat to retailers in Great Malvern Town Centre.

6.6 Pershore Town Centre

6.6.1 Pershore Town Centre is considered to display good levels of vitality and viability. Our assessment identifies the following strengths, opportunities, weaknesses and threats:

Strengths and Opportunities

- Attractive and historic built environment contributes to very good environmental quality.
- Strong leisure service offer including services supporting the evening economy.
- Low and decreasing vacancy levels across the town centre.
- Opportunities exist to make more of the town's riverside location.

Weaknesses and Threats

- Low levels of footfall to the north of the town centre.
- Railway station is poorly linked to the town centre.
- High proportion of small retail units may not meet modern retailer requirements.
- Local highway network can become busy.

6.7 Tenbury Wells Town Centre

6.7.1 Our detailed vitality and viability health check finds that Tenbury Wells Town Centre displays very good levels of vitality and viability. The following strengths, opportunities, threats and weaknesses have been identified:

Strengths and Opportunities

- Attractive, compact and walkable town centre.
- Generally, a good level of services/facilities catering for the day to day needs of local residents.
- Convenience goods provision has been significantly strengthened following the opening of the Tesco foodstore.

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- Low vacancy rate.
 - The Regal Cinema.

Weaknesses and Threats

- The town is relatively isolated and poorly connected by public transport
- There is pressure on car parking within the town centre
- The financial banking/building society sector is weakened and is now limited to one high street bank.
- The local highway network can often become congested, particularly at peak periods.

6.8 Upton-upon-Severn

6.8.1 Overall, Upton-upon-Severn Town Centre is considered to display good levels of vitality and viability. Having regard to our vitality and viability health check assessment, including feedback from key stakeholders, we consider that the principal strengths, weaknesses, opportunities and threats to the centre are as follows:

Strengths and Opportunities

- Upton-upon-Severn Town Centre has a strong leisure offer and the town clearly benefits from hosting several high-profile annual events
- Attractive and historic built environment in a favourable riverside location
- The town centre has a very low and decreasing vacancy level.
- Attractive tourist destination with shops/services providing a dual function for local residents/tourists.

Weaknesses and Threats

- Poorly connected by public transport, limiting access for those without a motor vehicle.
- The convenience goods offer is limited with only 2 relatively small units catering for food shopping needs.
- There is low footfall within the Town Centre outside of peak holiday periods.

7.0 Quantitative Retail Needs Assessment

7.1 Introduction

- 7.1.1 This section of the study provides a summary of our detailed assessment of the retail needs undertaken for each of the 7 centres. Detailed assessments of the convenience goods and comparison goods capacity can be found at **Appendix H**.
- 7.1.2 In considering the capacity figures, it should be noted that the NPPF no longer requires for local plans to meet the needs 'in full' in the plan period. Given the uncertainty in forecasting long term retail trends, policies only need to look at least ten years (in this case to 2029), and not necessarily over the full plan period when allocating sites to meet the 'likely' needs for town centre uses.

7.2 Potential Capacity for Future Convenience Goods Floorspace

- 7.2.1 Figure 7.1 shows that by 2029 (the minimum timeframe identified by the NPPF when allocating sites), after commitments, there is nil capacity in Tenbury and Pershore, and limited capacity (less than 700sq m net) in Worcester, Evesham, Droitwich and Upton-upon Severn. Malvern, primarily due to existing stores overtrading, is assessed to have capacity of circa 2,000sq m net by 2029.
- 7.2.2 The assessment also identifies that by the end of the plan period, with the exception of Pershore, and Tenbury Wells, there is a degree of capacity for additional convenience goods floorspace in all towns within South Worcestershire.
- 7.2.3 The convenience goods residual expenditure/floorspace capacity figures for the 7 city/town centres before taking into account commitments and planning permissions are summarised in Figure 7.1 below.

Figure 7.1: Quantitative Need for Convenience Goods Floorspace

Year	Surplus Expenditure	Commitments	Residual	Floorspace Requirement
	£m	£m	£m	(sq m net)
Worcester				
2019	-4.6	NA	-4.6	-
2025	1.5	NA	1.5	100
2029	7.7	NA	7.7	700
2035	16.3	NA	16.3	1,500
2041	44.7	NA	44.7	4,000
Evesham				
2019	9.1	14.2	-5.1	-
2025	12.3	14.4	-2.1	-
2029	15.4	14.4	1.0	100
2035	19.7	14.4	5.3	500
2041	33.9	14.4	19.6	1,700

Year	Surplus Expenditure	Commitments	Residual	Floorspace Requirement
	£m	£m	£m	(sq m net)
Droitwich				
2019	14.3	9.1	5.2	500
2025	15.9	9.2	6.7	600
2029	17.3	9.2	8.1	700
2035	19.3	9.2	10.1	900
2041	25.9	9.2	16.7	1,500
Pershore				
2019	-8.2	NA	-8.2	-
2025	-7.9	NA	-7.9	-
2029	-7.4	NA	-7.4	-
2035	-6.8	NA	-6.8	-
2041	-4.8	NA	-4.8	-
Malvern				
2019	19.4	NA	19.4	1,800
2025	22.0	NA	22.0	2,000
2029	24.3	NA	24.3	2,200
2035	27.6	NA	27.6	2,500
2041	38.4	NA	38.4	3,400
Tenbury				
2019	-18.8	NA	-18.8	-
2025	-18.7	NA	-18.7	-
2029	-18.3	NA	-18.3	-
2035	-17.9	NA	-17.9	-
2041	-16.3	NA	-16.3	-
Upton-upon-Severn				
2019	0.6	NA	0.6	100
2025	0.7	NA	0.7	100
2029	0.7	NA	0.7	100
2035	0.8	NA	0.8	100
2041	1.2	NA	1.2	100

Source: Appendix H
2017 Prices

7.3 Potential Capacity for Future Comparison Goods Floorspace

- 7.3.1 A minimum and maximum floorspace requirement is identified in our comparison goods floorspace capacity assessment to reflect the variations in retailer sales densities. The minimum floorspace requirement figure is based on the identified need being met through the delivery of high street floorspace in the town centres and the maximum figure relates to need being met by bulky goods retailers, which generally accommodate operators which achieve lesser sales densities. It is considered that the minimum floorspace requirement figure should be adopted when planning for additional floorspace in the town centres.

- 7.3.2 The assessment identifies that as the main comparison goods retail destination in south Worcestershire Worcester is assessed to have the greatest level of floorspace capacity requirements by 2029 (6,200sq m net).
- 7.3.3 For Evesham, the existing commitments/planning permissions are assessed to absorb any available floorspace capacity requirements at 2029, whilst in Malvern, it is estimated that there is likely to be comparison goods floorspace capacity of circa 1,000sq m net by 2029.
- 7.3.4 Turning to Pershore and Droitwich Spa, capacity in Pershore is assessed to be limited to circa 300sq m net whilst Droitwich's capacity is assessed to be at slightly higher level:800sq m net by 2029.
- 7.3.5 In terms of the smaller centres of Tenbury Wells and Upton-upon-Severn, only a very small (100sq m net) level of capacity is identified in Tenbury Wells by 2029 whilst no capacity is identified for Upton-upon-Severn by 2029.
- 7.3.6 The assessment also identifies that by the end of the plan period, there is a degree of capacity for additional comparison goods floorspace in all towns within south Worcestershire. The greatest level of capacity identified for Worcester (22,000sq m net) with between circa 3,000-5,500 identified for Malvern, Evesham and Droitwich Spa and smaller amount for Pershore (circa 1,000sq m net), Tenbury (400sq m net) and Upton-upon-Severn (200sq m).
- 7.3.7 The comparison goods residual expenditure/floorspace capacity figures for the 7 city/town centres after taking into account commitments/planning permissions are summarised in Figure 7.2 below.

Figure 7.2: Quantitative Need for Comparison Goods Floorspace

Year	Surplus Expenditure	Commitments	Residual	Floorspace Requirement (sq m net)	
	£m	£m	£m	Minimum	Maximum
Worcester					
2025	12.0	-	12.0	1,700	2,500
2029	48.3	-	48.3	6,200	9,400
2035	157.6	-	157.6	17,800	26,700
2041	223.7	-	223.7	22,000	33,000
Evesham					
2025	2.7	10.6	-	-	-
2029	11.0	11.6	-	-	-
2035	35.8	13.3	22.5	2,900	4,700
2041	50.9	15.2	35.6	4,000	6,500
Droitwich					
2025	1.4	NA	1.4	200	400
2029	5.5	NA	5.5	800	1,300
2035	17.9	NA	17.9	2,300	3,700
2041	25.5	NA	25.5	2,900	4,600

Year	Surplus Expenditure	Commitments	Residual	Floorspace Requirement (sq m net)	
	£m	£m	£m	Minimum	Maximum
Pershore					
2025	0.5	NA	0.5	100	100
2029	1.9	NA	1.9	300	500
2035	6.3	NA	6.3	800	1,400
2041	8.9	NA	8.9	1,100	1,800
Malvern					
2025	3.0	4.8	-	-	-
2029	12.2	5.3	7.0	1,000	1,700
2035	40.0	6.1	33.9	4,400	7,100
2041	56.8	7.0	49.8	5,600	9,100
Tenbury Wells					
2025	0.2	NA	0.2	-	100
2029	0.7	NA	0.7	100	200
2035	2.3	NA	2.3	300	600
2041	3.3	NA	3.3	400	700
Upton-upon-Severn					
2025	0.1	NA	0.1	-	-
2029	0.3	NA	0.3	-	100
2035	0.9	NA	0.9	100	200
2041	1.3	NA	1.3	200	300

Source: Appendix H
2017 Prices

7.4 Summary

- 7.4.1 The assessment identifies that by 2029 (the minimum timeframe identified by the NPPF when allocating sites), after commitments, there is nil convenience goods capacity in Tenbury, Upton-upon-Severn, and Pershore, and limited capacity (less than 700sq m net) in Worcester, Evesham, and Droitwich Spa. Malvern, primarily due to existing stores overtrading, is assessed to have capacity of circa 2,000sq m net by 2029.
- 7.4.2 In terms of comparison goods capacity by 2029, as the largest centre in south Worcestershire, the majority of comparison goods floorspace capacity is identified in Worcester (circa 6,200sq m net). Across the other towns in south Worcestershire, the estimated capacity varies. Malvern and Droitwich Spa both have an estimated floorspace capacity of circa 1,000sqm net, whilst Pershore and Tenbury Wells have a smaller level of capacity (300sq m and 100sqm net respectively). Retail commitments/planning permission absorb any available comparison goods capacity in Evesham and, primarily due to its size and role, there is no capacity for comparison goods floorspace in Upton-upon-Severn by 2029.

8.0 Commercial Leisure Needs Assessment

8.1 Introduction

- 8.1.1 This section of the study provides a summary of our detailed assessment of the commercial leisure needs undertaken for the city and each of the town centres across south Worcestershire. The assessments, found at **Appendix I**, use data gathered from the household survey to understand how leisure facilities in south Worcestershire currently meet the needs of its population. The results from this, coupled with the use of national statistics in respect of the typical level of provision for specific types of leisure facilities, and reference to estimated increases in the Study Area population are then used to inform our judgement in respect of the likely future needs.

8.2 Leisure activities participation and provision

- 8.2.1 The assessment finds that visiting restaurants is the most popular leisure activity across the study area, with an average of 70% of respondents in each survey zone visiting such facilities. Other popular activities include visiting cafes and coffee shops, visits to pubs and bars, and undertaking trips to the cinema.
- 8.2.2 When asked about what additional facilities they would like to see more of, a new bowling alley was the most common response from respondents across the survey area, followed by a new cinema and then more facilities for children and for youths/teenagers. More than 60% of respondents indicated that they would not like to see any more leisure facilities however, indicating that a large proportion of residents are generally satisfied with the current available leisure provision.

8.3 Restaurant & Cafes/Coffee Shops

- 8.3.1 Overall, our analysis finds that the restaurant and café/coffee shop provision across 7 city and town centres in south Worcestershire is generally good and we identify no material deficiency. Reflecting the size and role of the city, Worcester City Centre attracts the most visits and the recent redevelopment of Cathedral Square has significantly improved the offer in the city. Evidence from the household survey shows that that City Centre has an influence in each of the survey zones and it is clearly an attractive destination for visits to restaurants and cafés/coffee shops.
- 8.3.2 Our analysis finds that the retention levels and influence of restaurant facilities in Droitwich Spa are low for the size of the town, but this reflects the close proximity of Worcester which has a significantly larger offer. Similarly, relatively low retention rates in Great Malvern, Pershore and Upton-upon-Severn reflect the roles of these towns and proximity to larger settlements.

8.4 Health & Fitness Facilities

- 8.4.1 Based on participation rates and the projected increase in the population of south Worcestershire, there is likely to be a quantitative need for new health, fitness and gym facilities over the next 10 years. Our analysis indicates that Worcester City Centre could potentially accommodate 2-3 additional health & fitness facilities over the next decade and that Evesham and Great Malvern may also have a need for a new facility in their town centres over this period of time, although this need is considered marginal. It is unlikely that there will be a requirement for any new facilities in Droitwich Spa, Pershore, Tenbury Wells or Upton-upon-Severn over the next 10 years, and existing facilities in, or near to each town are assessed to adequately serve these towns.

8.5 Cinemas

- 8.5.1 The existing cinema provision across south Worcestershire is split between 2 large-scale multi-screen operators in Worcester, and smaller scale, locally run facilities in each of the other towns. Reflecting the strong provision in Worcester, the 2 cinemas in the city capture 40% of the market share from across the study area and have an influence on each of the other towns in south Worcestershire.
- 8.5.2 Based on the current market share and the number of existing screens in south Worcestershire, our analysis indicates that there may be capacity for an additional small cinema facility in the study area by 2029. When these requirements are assessed on a town by town basis, having regard to their size and existing cinema provision, we consider that Evesham is best placed to accommodate this need. Should proposals come forward for the redevelopment of the Riverside Shopping Centre, we consider that a small to medium sized cinema in this location could enhance the leisure offer within the town centre and help to retain some of the market which is currently lost to facilities in Cheltenham.

8.6 Tenpin Bowling

- 8.6.1 There are currently 2 ten-pin bowling facilities in south Worcestershire with both located in Worcester. Overall, we consider this provision to adequately meet the requirements of the population of south Worcestershire. There could be potential for Evesham to accommodate a small indoor bowling facility given that 80% of the bowling trips from the town are made to facilities in Cheltenham, and just over a third of respondents from the town indicated they would like an additional bowling facility. At the present time, there are no requirements from tenpin bowling operators to open a new facility in the town (or even in South Worcestershire) and we recommend therefore, that should any proposals for such development be forthcoming, they are judged on their own merit in accordance with relevant town centre planning policy at the time of the submission of an application.

8.7 Bingo

- 8.7.1 There are currently 2 permanent bingo halls in South Worcestershire, both located in Worcester although household survey responses indicate that additional bingo activities take place in several other locations across the study area, mainly in village halls in rural areas.
- 8.7.2 Only a very small proportion of respondents to the household survey (3%) indicated that they visit bingo facilities. Given that current trends for bingo halls show that activity is increasingly moving online instead of physical venues, and the existence of 2 large venues in Worcester already, we do not consider that there will be a requirement for an additional bingo facility in South Worcestershire. We recommend that, if any demand arises in the future, proposals for such development are judged on their own merit in accordance with relevant town centre planning policy at the time that an application is submitted.

8.8 Arts and Cultural Facilities

- 8.8.1 Arts and cultural activities play an important role in providing distinct identity to settlements and places, and they are also an important contributor to the local economy. For the purposes of our assessment, consideration has been given to the provision of theatres, museums and art facilities within South Worcestershire, and the popularity of each city/town centre as a destination.
- 8.8.2 Presently, Worcester and Great Malvern are the most popular destinations for trips to arts and cultural facilities within South Worcestershire and both destinations draw visits from across the study area. The popularity of Great Malvern can be attributed to the town's theatre complex which has a national reputation, while Worcester sustains a good number of facilities as it is a major sub-regional centre and is considerably larger than the other towns in the region.
- 8.8.3 We do not consider that there is a current requirement for new cultural facilities in Worcester, however in order to maintain and improve current visitor numbers, consideration should be given to ways of further promoting existing facilities and improving existing marketing strategies.
- 8.8.4 In terms of the existing arts and culture provision in the other towns across South Worcestershire, we consider that it is currently of a scale which is appropriate to each town's role in the hierarchy. Demand/need for additional provision is likely to be limited due to the location of existing more comprehensive cultural facilities in the sub-regional centre of Worcester. We again recommend that, should any proposals for arts and cultural development be forthcoming, they are judged on their own merit in accordance with relevant town centre planning policy at the time of an application's submission.
- 8.8.5 In terms of arts and cultural facilities, the study identifies that existing provision across each centre in South Worcestershire is of a scale appropriate to their role in the hierarchy. As a major sub-regional centre, Worcester is considered to sustain a good number of cultural facilities which draw visits from a large area

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- 8.8.6 Consideration should be given to ways of further promoting and improving marketing of existing facilities and any future proposals for arts and/or cultural development be assessed on its own merit.

12.0 Key Findings & Recommendations

12.1 Summary of Identified Need

- 12.1.1 The quantitative need findings identified for each centre within South Worcestershire are summarised in Figure 12.1 below.

Figure 12.1: Quantitative Capacity Summary (to 2029))

Centre	Convenience Goods (sq m net)	Comparison Goods (sq m net)	Health & Fitness (no.)	Cinema Screens (no.)	Bingo (no.)	Tenpin Bowling (no.)
Worcester	700	6,200	2-3	nil	nil	nil
Evesham	100	nil	1	1-2	nil	nil
Droitwich	700	800	nil	nil	nil	nil
Great Malvern	2,200	1,000	1	nil	nil	nil
Pershore	nil	300	nil	nil	nil	nil
Tenbury Wells	nil	100	nil	nil	nil	nil
Upton-upon-Severn	nil	nil	nil	nil	nil	nil

Notes: Quantitative Capacity figures are post commitments/planning permissions.

- 12.1.2 Our study identifies that by 2029 (the minimum timeframe identified by the NPPF when allocating sites), after commitments, there is nil convenience goods capacity in Tenbury, Upton-upon-Severn, and Pershore, and limited capacity (less than 700sq m net) in Worcester, Evesham, and Droitwich Spa. Malvern, primarily due to existing stores overtrading, is assessed to have capacity of circa 2,000sq m net by 2029.
- 12.1.3 In terms of comparison goods capacity by 2029, as the largest centre in south Worcestershire, the majority of comparison goods floorspace capacity is identified in Worcester (circa 6,000sq m net). Across the other towns in south Worcestershire, the estimated capacity varies. Malvern and Droitwich Spa both have an estimated floorspace capacity of circa 1,000sqm net, whilst Pershore and Tenbury Wells have a smaller level of capacity. Retail commitments/planning permission absorb any available comparison goods capacity in Evesham and, primarily due to its size and role, there is no capacity for comparison goods floorspace in Upton-upon-Severn by 2029.

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- 12.1.4 In terms of indoor health & fitness provision, whilst a low proportion of respondents to the survey wanted to see a new gym facility in their local area, the forecast and outstanding operator requirements have indicated that Worcester City Centre could potentially accommodate 1-2 additional health & fitness facilities over the next 10 years. It is also calculated that Evesham and Malvern may also have a need for a new facility in each town centre over the next decade although there are no current operator requirements, so this need is considered marginal.
- 12.1.5 When looking at cinema needs across south Worcestershire, the existing cinema provision largely meets the needs of the current population with facilities in each of the Town Centres and 2 large cinemas in Worcester. Our calculations suggest however, that there may be capacity for additional facilities in Evesham, and should proposals come forward for the redevelopment of the Riverside Shopping Centre, a small to medium sized cinema in this location could meet this need.
- 12.1.6 Turning to bingo halls, there are currently 2 facilities in Worcester City Centre and responses to the household survey indicate that additional bingo activities take place in several other locations across south Worcestershire. In light of low participation levels and the trend for bingo activities moving online, we do not consider it likely that there will be a requirement for an additional facility within the plan period.
- 12.1.7 For tenpin bowling, the study identifies that there are 2 facilities in south Worcestershire (both again in Worcester) that adequately meet the requirements of the population. Responses to the household survey from those in Evesham indicate that a new bowling facility in the town would be well received in the town although there are no requirements from tenpin bowling operators to open a new facility. Accordingly, we do not consider it necessary to plan for a new facility in Evesham, but should proposals for such a development come forward, it should be judged on its own merit in accordance with town centre policies at the time of submission.
- 12.1.8 In terms of arts and cultural facilities, the study identifies that existing provision across each centre in south Worcestershire is of a scale appropriate to their role in the hierarchy. Consideration should be given to ways of further promoting and improving marketing of existing facilities and any future proposals for arts and/or cultural development be assessed on its own merit.

12.2 Review of Relevant Retail & Town Centre Policy

- 12.3.1 In drawing up Local Plans, Paragraph 85 of the NPPF requests the LPA to define a network and hierarchy of centres.
- 12.3.2 Emerging retail and leisure policy proposed within the South Worcestershire Development Plan Review identifies Worcester, Evesham, Droitwich Spa, Great Malvern, Pershore, Tenbury Wells, and Upton-upon-Severn as 'City and Town Centres'. Underneath this, 3 District Centres (Barnards Green, Malvern link, and St Johns) are identified alongside 8 Local Centres.

- 12.3.3 In the absence of any definition to rely on in the NPPF and the NPPG, the definition of different tiers of the hierarchy provided by the now superseded Planning Policy Statement 4 (PPS4) remains of some relevance. In respect of the definition of town centres, district centres and local centres, PPS4 states the following:

"Town centres will usually be the second level of centres after city centres and, in many cases, they will be the principal centre or centres in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability. In London the 'major' and many of the 'district' centres identified in the Mayor's Spatial Development Strategy typically perform the role of town centres.

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.

Local centres include a range of small shops of a local nature, serving a small catchment. 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 a local centre.

Small parades of shops of purely neighbourhood significance are not regarded as centres for the purposes of this policy statement."

- 12.3.4 Experian defines the multi-functional offer of a city or town as including residential, public service, leisure and entertainment, commercial and cultural facilities (amongst others) and Annex 2 of the NPPF:

"Retail development (including warehouse clubs and factory outlet centres); leisure, entertainment facilities the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities)."

- 12.3.5 In accordance with the findings of this Study, the role and functions of the centres, and in light of these definitions, we recommend that Worcester, Evesham, Droitwich Spa, Great Malvern, Pershore, Tenbury Wells, and Upton-upon-Severn are retained as 'City and Town Centres'.

12.3 Recommended Local Impact Threshold

- 12.4.1 In accordance with national planning policy, it is appropriate to identify locally set retail thresholds for the scale of edge-of-centre and out-of-centre development which should be subject to the assessment of the impact criteria set out by paragraph 89 of the NPPF. The NPPF sets a default impact threshold of 2,500sq m gross. The NPPG explains that gross retail floorspace is defined as *"the total built floor area measured externally which is occupied exclusively by a retailer or retailers, excluding open areas used for the storage, display or sale of goods"* (paragraph 16).
- 12.4.2 At present, Policy SWDP 10 (Protection and Promotion of Centres and Local Shops) sets a local impact assessment threshold and it requires that retail proposals over 1,000 sqm floorspace located outside of the defined centres must be accompanied by a Retail Impact Assessment. Emerging policy proposed within the SWDP Review seeks to retain this threshold.
- 12.4.3 When setting a locally appropriate threshold, the NPPG considers the following aspects important in setting a locally appropriate threshold:
- Scale of proposals relative to town centres;
 - The existing viability and vitality of town centres;
 - Cumulative effects of recent developments;
 - Whether local town centres are vulnerable;
 - Likely effects of development on any town centre strategy; and
 - Impact on any other planned investment.
- 12.4.4 Following the assessment undertaken within this study and having regard to, *inter alia*, the current health, performance, unit and floorspace composition of each of the town centres; increasing competition from the internet; and availability of units in the prime shopping area capable of meeting potential national multiple occupiers in each of the centres, WYG does not consider that a blanket threshold is suitable for each centre across south Worcestershire. Instead, our recommendation is that policy should advocate a tiered approach whereby the threshold applied to planning applications at edge-of-centre and out-of-centre locations varies in relation to the size, role and function of a particular centre.
- 12.4.5 In our experience, it will only generally be development of a greater scale than these impact thresholds that could lead to a 'significant adverse' impact and merit the refusal of an application for town centre uses in accordance with the provisions of paragraph 90 of the NPPF.
- 12.4.6 The thresholds should not only apply to new floorspace, but also to changes of use and variations of condition to remove or amend restrictions on how units operate in practice.

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- 12.4.7 Worcester City Centre, as the main retail destination in south Worcestershire provides the biggest range of retail and leisure uses which help to draw shoppers from across the region. Having regard to the anchor stores, number of retail units, overall retail floorspace and vitality and viability of the City Centre, we recommend that the retail impact threshold should remain at 1,000 sqm gross. This should provide the Council with sufficient flexibility to assess the merits and potential impact implications of edge and out-of-centre retail applications.
- 12.4.8 Although smaller than Worcester, the Town Centres of Evesham, Droitwich Spa and Great Malvern still draw shoppers from their surrounding areas. We recommend that the retail impact threshold of 750sqm is required for these Town Centres to ensure that their vitality and viability would not be significantly impacted upon. Despite Pershore Town Centre accommodating a similar number of units to Great Malvern Town Centre, with the exception of the anchor Asda store, the average unit size in Pershore is much smaller meaning that the Town Centre could be vulnerable to out-of-centre retail proposals. On this basis, we would recommend a lower retail impact threshold of 500 sqm.
- 12.4.9 Tenbury Wells and Upton-upon-Severn are small in size and characterised by small-scale retail units on the whole. We consider that a lower threshold of 350 sqm is required for these Town Centres to ensure that their vitality and viability are not impacted upon.
- 12.4.10 It is important to stress that whilst the locally set threshold would require the submission of an impact assessment for all edge-of-centre and out-of-centre developments exceeding the thresholds, national guidance states that the impact test should be undertaken in a proportionate and locally appropriate way, commensurate to the scale of development proposed. The level of detail would typically be agreed with planning officers during the pre-application process in order to avoid overly onerous requirements that may otherwise restrict and delay development opportunities from coming forward.

12.4 Review of Town Centre Boundaries and Primary Shopping Areas & Relevant Policy

- 12.5.1 The NPPF identifies that LPA's planning policies should define the extent of town centres and primary shopping areas and set out the range of uses permitted in such locations as part of a positive strategy for the future of each centre. The NPPG (paragraph 002) also identifies that authorities may, where appropriate, also wish to define primary and secondary retail frontages where their use can be justified in supporting the vitality and viability of particular centres.
- 12.5.2 The existing SWDP Policies Map defines the Town Centre Boundaries, Primary Shopping Frontages and Secondary Shopping Frontages for each of the city and town centres. It is noted that no Primary Shopping Areas were identified in the plan.

12.5.3 As part of this study, and in line with the brief, WYG has reviewed the existing boundaries and frontages. Our review has had regard to our vitality and viability health check and detailed analysis of each town centre. We set out our recommended town centre boundaries, primary shopping areas and primary shopping frontages for each of the 7 city/town centres at **Appendix J**.

12.5.4 As part of this commission officers have asked us to advise on a proposed policy relating to planning applications for the change of use of units within town centres/primary shopping areas. The proposed policy together with our recommended changes is set out below:

"Within the Primary Shopping Areas Frontages, as shown on the Policies Map, change of use from retail (use class A1) beyond that allowed by the General Permitted Development Order or the extension of existing non-A1 uses into adjoining A1 premises at ground floor level will not be permitted.

Outside of Primary Shopping Areas Frontages and within ~~City/Town~~ centre Primary Shopping Area boundaries as shown on the Policies Map, change of use from retail (use class A1) to non-retail uses in classes, A3, A4, A5, D1, D2 will be permitted provided:

- The proposed use will not result in a continuous frontage of three or more non-A1 retail units (units are defined as a shop front width of about 6 metres; larger units will be assessed in terms of unit length).*
- ~~A minimum of 50% of units in each City/Town centre are retained in A1 retail use.~~*
- The proposed use will not result in the proportion of units in a street in A3, A4 and A5 use exceeding 30%.*
- A shop window will be retained at all times."*

12.5.5 We understand from planning officers that there continues to be pressure on the town centres in south Worcestershire for change of use applications from A1 to other uses. Given this, and the fact that A1 retail continues to play an important part in the offer of town centres in south Worcestershire, we consider, subject to the extent of the frontages and whether they would stifle other important town centre uses opening in the wider town centre area, that designating primary shopping frontages in each of the centres is justified.

12.5.6 In terms of our proposed changes to the draft policy we recommend that reference is made to the primary shopping frontage as opposed to primary shopping areas and primary shopping areas as opposed to city/town centres. We also consider that the requirement to demonstrate that 50% of units in each city/town centre are retained in A1 retail use is onerous and would discourage other town centre uses and residential from occupying the town centres.

12.5.7 Our recommended primary shopping frontage, primary shopping areas and city/town centre boundaries and recommended changes to the above policy has been drafted taking into account NPPF's requirement for policies and decisions to take a positive approach to town centre growth, management and adaptation.

12.5.8 Finally, it should be noted that, in accordance with the NPPF, the town centre boundaries should be kept under review, where necessary, so that future anticipated needs can be accommodated.

12.5 Recommendation on a Town Centre A5 (Hot Food Takeaway) Uses Policy

12.5.9 A concentration of A5 uses in a town centre can have a negative impact on the vitality and viability of town centres. As part of this commission we have been asked to advise on a proposed policy relating to A5 uses. The proposed policy together with our recommendations on changes is provided below:

To maintain the variety and vitality of the retail offer across South Worcestershire and to support healthy communities planning applications for new takeaway food outlets will be approved providing:

- *They will not result in two or more takeaway food outlets adjacent to each other.*
- *They will not result in four or more takeaway food outlets within four hundred metres of the application site.*
- *These requirements are in addition to, the need for, and compliance with the findings of, a Health Impact Assessment.*

12.5.10 Generally, whilst this policy applies to all 7 city/town centres in south Worcestershire which vary in size, we consider it to be reasonable, not unduly restrictive, and generally accords with the NPPF.

12.6 Recommendations on a Town Centre Night Time Economy Policy

12.6.1 Turning to a potential policy supporting the night time economy in the town centre, we set out the policy officers have asked us to consider below. The policy also includes our recommendation on potential changes.

New, or extensions to existing, night time economy uses (takeaway food outlets, drinking establishments and night clubs) will be supported provided they:

- *Do not result in a clustering of dead frontages during the daytime;*
- *Do not, on their own, or cumulatively, result in an unacceptable impact on neighbouring occupiers by reason of disturbance, traffic or safety;*

- *Do not, on their own, or cumulatively, result in an inappropriate balance of uses;*
- ~~*Will not in the view of the West Mercia Crime Risk Manager increase levels of crime and disorder.*~~

12.6.2 Of the proposed criteria which are set out that any planning application will need to meet, the first three are reasonable in our view. However, the fourth bullet criteria is somewhat ambiguous and potentially unnecessary given that West Mercia Police would be consulted on any such planning application and the planning officer would take such views/response into account in determining a planning application.

12.7 Recommendations in Respect of the Council's Future Retail & Commercial Leisure Strategy

- 12.7.1 The City and Town Centre strategies in south Worcestershire need to be able to support the continued development/changes in the 'high street' if they are to successfully compete. As noted earlier in this study the key purpose of the town centre strategies should be to build on the existing individuality of centres, be a focus/hub for their communities, attract a mix of additional land uses beyond retail/leisure, (including residential, educational, community and office uses) and extend the 'dwell time' and spend of visitors/residents visiting the town centre and in turn the vitality and viability of the centre.
- 12.7.2 The recommended key retail and commercial leisure elements to each town centre strategy, as a result of the findings of this study, are set out below:

Worcester City Centre

- Maintain, and where possible, strengthen the town centre's strong mix of national multiple and independent occupiers.
- Investigate site/unit opportunities to meet the commercial leisure and retail needs identified in this study. In doing so it will be important to take into account the need to attract a mix of additional land uses (most notably student accommodation, residential and office use) beyond retail/leisure to the City Centre.
- Strengthen the relationship between the town centre and riverside / canalside locations to improve linkages and further enhance the attractiveness of the City Centre.
- Consult with owners of properties which currently detract from the environmental quality of the centre to establish potential opportunities for their enhancements.
- Work in partnership with the Crowngate Shopping Centre to improve the bus station and enhance this gateway into the City Centre.

Evesham Town Centre

- Work with the owners of the Riverside Shopping Centre to explore opportunities for the redevelopment of the site to incorporate a mix of additional land uses including leisure and residential uses.
- Consider whether there are potential future opportunities to assist in increasing the number of clothing and footwear outlets in the town centre.
- Investigate opportunities to bring back a weekly market to the town centre.
- Undertake further highways work to improve the traffic flow through the town centre.
- Develop a marketing strategy to seek to improve the perception of the town centre. The marketing strategy should provide an assessment to understand the potential options for promoting existing facilities and marketing the town centre to other commercial operators.

Droitwich Spa Town Centre

- Identify site/unit opportunities to improve the leisure offer within the town centre.
- Undertake a public realm improvement study to investigate potential opportunities to improve the quality of the town centre along St Andrews Street and Ombersley Road. It will be important to engage with stakeholders and town centre occupiers.
- Investigate ways to improve the pedestrian linkage between the Town Centre and the railway station.
- Work with landowners to help facilitate the re-occupation/redevelopment of The Raven Hotel.

Great Malvern Town Centre

- Investigate site/unit opportunities to meet the identified comparison and convenience retail goods capacity.
- Continue investment and ongoing efforts in maintaining the existing attractive public spaces.
- Take advantage of the town centre's favourable location at the foot of the Malvern Hills to attract more international visitors.

Pershore Town Centre

- Improve connectivity with the market and investigate ways to improve footfall in the north of the town centre.
- Consult with owners of vacant properties and those which currently detract from the environmental quality of the centre to establish potential opportunities for their enhancements.
- Investigate ways to improve connectivity with the River Avon.

Tenbury Wells Town Centre

- Embrace the strong independent offering in the town centre and where possible seek to enhance it, particularly the comparison goods offer.
- Seek ways to improve the public transport linkages to/from the town centre.
- Undertake a parking study to investigate and identify opportunities to enhance the parking provision within the town centre.
- Seek ways to improve the public transport provision in the town centre.

Upton-upon-Severn Town Centre

- Continue to promote the town as a leisure destination.
- Seek ways to improve the public transport provision in the town centre.
- Maintain the town centre's strong leisure offer.

12.7.3 In addition to the above, the Council, in partnership with its stakeholders, should continue to promote the town centres across south Worcestershire (particularly through the internet (e.g. www.visitworcestershire.org)) as not just places to shop and eat/drink but also places to work, stay and live.

Glossary of Terms

Capacity	Retail capacity in terms of this report refers to surplus/deficit of expenditure (£m) which represents the difference between the expenditure and turnover of the identified facilities.
CTN	Shops selling Confectionary, Tobacco and newspapers
Comparison Goods	Comparison goods relate to items not obtained on a frequent basis, these include clothing, footwear, household and recreational goods.
Convenience Goods	Convenience goods relate to everyday essential items including confectionary, food, drinks, newspapers and magazines.
District Centre	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.
Expenditure Per Capita	The average spend of each person within the defined Study Area on a variety of retail goods.
Expenditure	Expenditure is calculated by taking the population within a defined area and then multiplying this figure by average annual expenditure levels for various forms of goods.
Expenditure Forecasts	This assessment has been undertaken using the 'goods based' approach as prescribed in the Planning for Town Centres Practice Guidance. Retail expenditure forecasts have been derived from Experian Retail Planner Briefing Note 14 (November 2016).
Experian (MMG3)	The database used to identify population, expenditure and socio-economic breakdown of the Study Area population.
Gross Floorspace	Represents the level of total floorspace or footprint of a specific development (i.e. sales area, storage, checkouts, café, display, and so on).
GOAD Plans	Provide accurate information on the composition of town centres, shopping areas, out-of-town retail parks and outlet villages in the UK. Identifies the fascia name, retail category, floorspace, and exact location of all retail outlets and vacant premises.
GOAD Reports	Provide a snap-shot of the retail status or demographic make-up of Goad surveyed town centres. Provides a comprehensive breakdown of floorspace and outlet count

for all individual trade types in the Convenience, Comparison, Retail Service, Leisure, Financial/Business Services and Vacancy sectors.

Local Centre	Local centres include a range of small shops of a local nature, serving a small catchment. 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 a local centre.
Net Floorspace	Represents the level of internal area devoted to the sale of goods.
Market Share	Market shares derived from the household survey results, which are based on either the proportion of shopping trips or the proportion of expenditure attracted to a particular centre/facility.
National Multiple	This is a retail or service operator which is or part of a network of nine or more outlets.
Price Base	The price base for the Study is 2017; all prices are or have been adjusted to 2017 in order to be consistent.
Rates of Productivity	This takes into account the potential for existing retail floorspace to improve their turnover productivity (e.g. smaller goods could be sold from a smaller area for more money, increased opening hours, etc.).
Sales Density	Retail capacity figures are expressed in term of floorspace, relying on the application of assumed sales density figures to the surplus expenditure identified. This is based on the typical turnover of a store by square metre/foot.
Special Forms of Trading	Defined by Experian as expenditure not directed to traditional floorspace such as the internet, mail order, party plan and vending machines and other non-store activity such as market and road-side stalls.
Study Area	This represents the household survey area, which is based on postal sectors.
Trade Draw	This refers to the level of trade attracted to a particular facility/centre.
Turnover	The turnover figure relates to the annual turnover generated by existing retail facilities.

Town Centre

A town centre will usually be the second level of centres after city centres and, in many cases, they will be the principal centre of centres in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability.