



South Worcestershire Retail and Town Centres Study

July 2019

Volume 2 of 2 – Appendices



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Appendix A

Planning Policy Overview



1.1 Introduction

- 1.1.1 Given that this Study seeks to provide evidence to assist in the production of the Council's Local Plan, this appendix contains a review of existing national planning policy of pertinence to retail and town centre matters to explore the context for the Study and how it may impact upon the production of future development plan policy.

1.2 National Planning Policy

- 1.2.1 National Planning Policy for England is contained within the National Planning Policy Framework (NPPF) (February 2019). It sets out the Government's requirements for the planning system only to the extent that it is relevant, proportionate and necessary to do so.
- 1.2.2 The main theme of the NPPF is that there should be 'a presumption in favour of sustainable development'. The economic objective seeks to help build a strong, responsive and competitive economy, by ensuring that sufficient land of the right types is available in the right places at the right time to support growth. In terms of plan-making, it is stated that the planning system should be genuinely plan led and local planning authorities should positively seek opportunities to meet the development needs of their area, with an emphasis on Local Plans having sufficient flexibility to adapt to rapid change.
- 1.2.3 In terms of economic development, section 6 of the NPPF identifies that planning policies should create the conditions in which businesses can invest, expand and adapt. Significant weight should be placed on the need to support economic growth and productivity. Planning policies and decisions should recognise and address specific locational requirements of different sectors.
- 1.2.4 The NPPF stresses planning policies should set out a clear economic vision and strategy which positively and proactively encourages sustainable economic growth and be flexible enough to accommodate needs not anticipated in the plan and to enable a rapid response to changes in economic circumstances.
- 1.2.5 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. Paragraph 85 of the NPPF indicates that planning policies should:





- define a network and hierarchy of centres and promote their long-term vitality and viability – by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters;
- define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre;
- retain and enhance existing markets and, where appropriate, re-introduce or create new ones;
- allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least 10 years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability, so town centre boundaries should be kept under review where necessary;
- where suitable and viable town centre sites are not available for main town centre uses, allocate appropriate edge of centre sites that are well connected to the town centre. If sufficient edge of centre sites cannot be identified, policies should explain how identified needs can be met in other accessible locations that are well connected to the town centre;
- set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres; and
- recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites.

1.2.6 Paragraph 86 requires local planning authorities to adopt a sequential approach to the consideration of planning applications for main town centre uses that are not in an existing centre or in accordance with an up-to-date Local Plan. The following paragraph 88 indicates that that the sequential approach should not apply to applications for small scale rural offices or other small scale rural development.

1.2.7 Paragraph 89 indicates that local planning authorities should require an impact assessment for retail and leisure development outside of town centres which are not in accordance with an up-to-date Local Plan and if the development is over a proportionate, locally set threshold. Where there is no locally defined threshold, the default threshold will be 2,500sq m.





- 1.2.8 Paragraph 90 indicates that where an application fails to satisfy the sequential test or is likely to have a significant adverse impact on the vitality and viability of a town centre or on existing, planned, committed investment in a centre it should be refused.
- 1.2.9 The NPPF also recognises that retail and leisure activity should still, where possible, be focused in existing town centres. Retail and leisure proposals which cannot be accommodated in or adjacent to the town centre will have to satisfy a dual impact test and the sequential test.

1.3 Ensuring the Vitality of Town Centres Planning Practice Guidance

- 1.3.1 Ensuring the Vitality of Town Centres National Planning Practice Guidance was published in March 2014 and replaces the previous Planning for Town Centres Practice Guidance. It provides a more concise summation of how retail and main town centre planning policy is to be applied in practice. However, the objectives of the Practice Guidance remain comparable with those of its predecessor, with there being a stated requirement for local planning authorities to plan positively and support town centres to generate local employment, promote beneficial competition within and between town centres, and create attractive and diverse places where people want to live, visit and work.
- 1.3.2 The Practice Guidance requires local planning authorities to fully assess and plan to meet needs for main town centre uses through the adoption of a 'town centre first' approach. Paragraphs 002 and 003 confirm that this should be delivered through a positive vision or strategy which is communicated through the development plan. The strategy should be facilitated through active engagement with the private sector and other interested organisations (including Portas Pilot organisations, Town Teams and so on). Any strategy should be based on evidence which clarifies the current state of town centres and opportunities to meet development needs and support centres' vitality and viability.
- 1.3.3 Such strategies should seek to address the following matters:
- the appropriate and realistic role, function and hierarchy of town centres in the area over the plan period, including an audit of the vitality and viability of existing town centres and their ability to accommodate new development;
 - consideration of the vision for the future of each town centre and the most appropriate mix of uses to enhance overall vitality and viability;



- the evaluation of the town centre to assess whether it can accommodate the scale of assessed need, and if it cannot, evaluating different policy options to help accommodate the need;
- the timeframe for new retail floorspace to be delivered;
- what other complementary strategies are necessary or appropriate to enhance the town centre to deliver the vision in the future; and
- the consideration of how car parking provision could be enhanced and both parking charges and enforcement be made proportionate, in order to encourage town centre vitality.

1.3.4 Paragraph 005 of the Practice Guidance identifies a series of key indicators which are of relevance in assessing the health of a centre over time. Paragraph 005 goes on to state that not all successful town centre regeneration initiatives have been retail led or focused on substantial new development, but have instead involved improvements such as renewed public realm, parking, and accessibility and other partnership mechanisms.

1.3.5 Paragraph 007 identifies the importance of planning for tourism as an important component of any overall vision and indicates that local planning authorities should consider specific tourism needs (including locational or operational requirements) and opportunities for tourism to support local services, vibrancy and the built environment.

1.3.6 Paragraph 009 reaffirms the town centre first policy in the form of the sequential test, which requires local planning authorities to undertake an assessment of candidate sites' availability, suitability and viability when preparing their Local Plan. Such an assessment should also consider the scale of future needs and the type of land needed to accommodate main town centre uses.

1.3.7 The Ministry for Housing, Communities and Local Government (MHCLG) has confirmed to WYG that the planning practice guidance pertaining to town centre use planning policy will be updated to take account of the revised NPPF in due course, with no firm timescales at present.



1.4 Local Planning Policy Context

- 1.4.1 The relevant development plan for South Worcestershire is the South Worcestershire Development Plan (SWDP) which was adopted in February 2016.

South Worcestershire Development Plan (2016)

- 1.4.2 The retail and town centre policies of relevance within the SWDP are:

Policy SWDP 3: Employment, Housing & Retail Provision Requirement & Delivery

- 1.4.3 This policy sets out how the South Worcestershire Councils will plan, monitor and manage the delivery of housing, employment land and retail floorspace during the plan period to 2030. Regarding retail matters, the policy 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.
- 1.4.4 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.
- 1.4.5 Evidence provided by Consultants DPDS identifies retail floorspace requirements of around 39,500sqm across South Worcestershire between 2013-2031:

Retail Requirements 2013-2031 (net floorspace sq m)

	Convenience (sqm)	Comparison (sqm)	Total
Wider Worcester Area (WWA)*	0	30,726	30,726
Malvern Hills (excl. WWA)	669	6,786	7,455
Wychavon (excl. WWA)	0	1,326	1,326
South Worcestershire	669	38,838	39,507
*of which Worcester City	0	26,726	26,726



Policy SWDP9: Creating and Sustaining Vibrant Centres

- 1.4.6 Policy SWDP9 supports the provision of appropriate retail, leisure and tourism development provided that it contributes toward achieving a sustainable network of urban and rural settlements, and is of a scale appropriate to its location.
- 1.4.7 Proposals for retail or leisure development within City and Town Centres need to demonstrate that they contribute to a comfortable, safe, attractive and accessible environment and that they make full use of available space, avoiding the creation of vacant spaces above shop units. Proposals linked to the evening and night-time economy will be supported provided they do not result in dead frontages; result in unacceptable impacts on neighbouring uses by reason of disturbance, traffic or safety; and they do not result in an inappropriate balance of uses.
- 1.4.8 The policy also sets out that measures that secure the vitality and viability of individual retail centres will be set out in separate Supplementary Planning Documents, Neighbourhood Plans and Local Development Orders as appropriate, and these measures can include environmental enhancements and activities that seek to improve the visitor experience.

SWDP10: Protection and Promotion of Centres and Local Shops

- 1.4.9 Policy SWDP10 identifies the hierarchy of retail centres and sets out policy on development outside of these main centres. Worcester City Centre, Great Malvern, Droitwich Spa, Evesham, Pershore, Upon-upon-Severn, and Tenbury Wells Town Centres are identified as the highest order retail centres across South Worcestershire with four District Centres below, and 10 Local Centres, and 20 Neighbourhood Centres below this in turn. Retail and leisure development that is appropriate in location and scale, having regard to this hierarchy of centres is supported.
- 1.4.10 In line with national policy, out of centre retailing in South Worcestershire will be resisted unless the sequential test is satisfied, and it will have no significant impact on the vitality and viability of a centre. Any retail or leisure development proposal over 1,000sq m net that is located outside a defined centre must be accompanied by a Retail Impact Assessment.
- 1.4.11 Primary and Secondary Shopping Frontages in each City and Town Centre are defined on the Policies Map. The policy sets out that changes of use from A1 retail, or the extension of existing non-A1 into adjoining A1 uses at ground level will be resisted within the Primary Shopping Frontages, while the change of use from A1 to non-retail uses in A2-A5 and D1-D2 uses in Secondary Shopping Frontages will be permitted subject to a series of detailed criteria.





Neighbourhood Plans

- 1.4.12 The only neighbourhood plan within South Worcestershire of relevance to any of the retail centres is Malvern Town Neighbourhood Plan. A referendum was held in May 2019 where 86% of the votes cast were in favour of adopting the Plan, and it subsequently formally 'made' at a meeting of the Executive Committee in June 2019.
- 1.4.13 Policy MR1; Town and District Centres supports proposals for new town centre uses (Use Classes A1-A5) and social, culture and leisure uses (Use Classes D1 and D2 Non-Residential Institutions and Assemble and Leisure Uses) within the town and district centres in the Neighbourhood Plan Area provided they comply with the policies of the SWDP and do not result in unacceptable impacts on neighbouring uses.
- 1.4.14 Policy MT2: Town Centre and District Centres Car Parking supports proposals for development on land used for car parking adjacent to Great Malvern Town Centre providing equivalent replacement parking is also provided as part of the development. Proposals to increase the amount of car parking in Great Malvern Town Centre will also be supported provided they meet a criterion based on size, design and access.



Appendix B

Retail and Leisure Trends Overview & Government's Response to 'transform town centres'

1.1 Introduction

- 1.1.1 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, this appendix provides an overview of prevailing retail and leisure trends and the Governments response to 'transform town centres' below. Our overview draws on recognised retail and leisure data sources, including research by Experian, Global Data and Mintel.

1.2 Changing Retail Climate

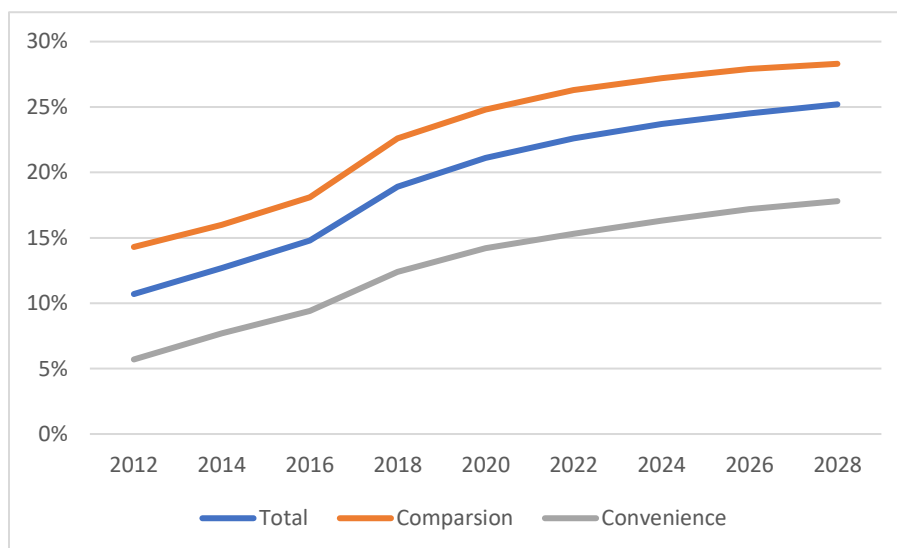
- 1.2.1 2018 was a challenging year for retailers. Deloitte report that it was the year that saw the most store closures and job losses since the 2008 global recession. The retail is an industry which is under pressure with many retailers finding themselves in an uncomfortable position as margins are squeezed between weakening demand and rising costs. Into 2019, retailers have continued to experience challenges, these challenges are expected to continue into the near future.
- 1.2.2 We summarise below the key issues impacting many retailers and town centres in the UK:
- Continued Rise in Internet Shopping;
 - Increased Town Centre Vacancy Levels & Store Closures; and
 - Uncertainty surrounding Brexit.

Continued Rise in Internet Shopping

- 1.2.3 Experian, in their latest Retail Planner Briefing Note identify that 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.
- 1.2.4 The latest projections by Experian forecast that non-store retailing will continue to grow rapidly, outpacing any growth in more traditional forms of spending. Non-store retailing is anticipated to continue to increase at a faster pace than total retail sales at least until 2028.



Figure 1.1: Estimated and Projected Market Share of Non-Store Retail Sales



Source: Experian Retail Planner Briefing Note 16 (December 2018)

Notes: Non-store retail sales (special forms of trading) comprises sales via the internet, mail order, stalls and markets, door to door and telephone sales.

1.2.5 Experian highlight that whilst the challenge to traditional store-based shopping from internet-based shopping will continue to grow a number of factors temper the threat. These factors include:

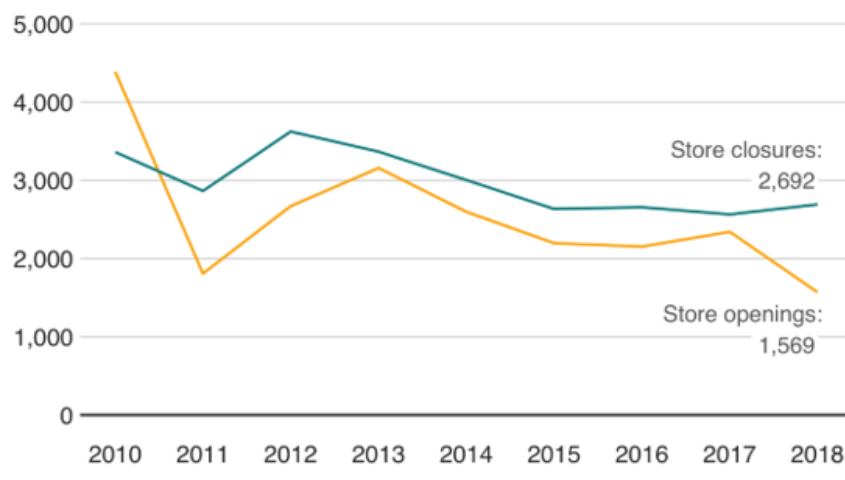
- Many stores sell online but source sales from regular stores rather than warehouses, implying an increase in required store floorspace to cater for rising internet sales;
- Even if non-store retailing outpaces store-based shopping, store-based shopping is still expected to continue to expand at an annual average of 1.8% per annum in per capita terms;
- It is probable that sales via the internet will begin to grow less rapidly at some point in the next few years; and
- A significant development is multi-channelling, where internet shopping actually drives demand for traditional outlets. In-store product and services offer (including collection/drop-off points for online orders (click and collect)) forms part of a co-ordinated multi-channel strategy and will continue to support demand for retail space.



Increased Town Centre Vacancy Levels & Store Closures

- 1.2.6 PwC reported (November 2018) that 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. Whilst daily store closures rates have plateaued at 14 stores a day, store openings have fallen, with a 773 fewer store openings in H1 (first half) 2017 compared to H1 2018.

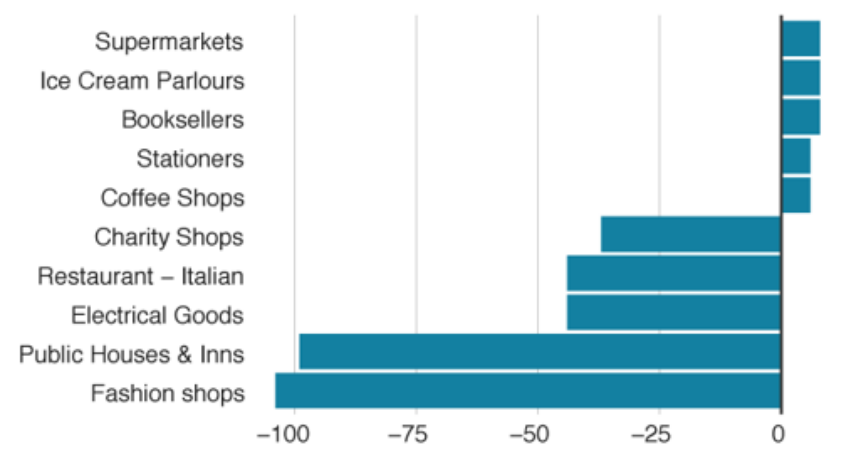
Figure 1.2: Openings and closures in Britain's Top 500 Town Centres- H1 2018



Source: PwC, Local Data Company

- 1.2.7 The research identified that supermarkets, ice cream parlours, booksellers, stationers, and coffee shops showed the highest increase in net store numbers in the first half of 2018. Whilst a continuing decline of fashion shops, electrical goods retailers, pubs, charity shops and Italian restaurants were recorded.

Figure 1.3: Net difference between Store Opening & Closures in Britain's Top 500 Town Centres - H1 2018



Source: PwC, Local Data Company





1.2.8 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 number of retailers restructuring (some involving a Company Voluntary Arrangement (CVA)) or going into administration including:

- Maplin entering into administration resulting in the closure of their 200+ stores (February 2018);
- Toys R Us going into administration closing all of its 105 stores (February 2018);
- Carpetright's announcement of its restructuring and closing some 81 of its 400 stores (April 2018);
- Fenwick department store's announcement to "modernise and reorganise the business" which could potentially involve store closures (April 2018);
- Mothercare's confirmation that it will close 50 of their 137 UK stores (May 2018);
- Poundworld going into administration closing all 355 of its stores (June 2018);
- House of Fraser entering into administration albeit immediately purchased by Sports Direct. At the time of writing it is not clear how many store closures will take place (August 2018);
- Homebase's owners (Hilco) announcement of closing a further 42 stores (61 in total) as part of a proposed CVA by early 2019 (August 2018);
- Coast entering into administration with Karen Millen buying part of the business excluding 24 retail stores (October 2018);
- New Look's announcement of its intention to close 85 stores following a restructuring plan (November 2018);
- Laura Ashley's announcement that it plans to reduce the number of its UK stores from 160 to 120 (December 2018);
- M&S's announcement that in total it will close 100 stores by 2022. 38 stores were announced as closing in 2018/2019, 30 of which have now closed. A further 17 store closures have since be named by M&S and are set to close in 2019/2020 (January 2019);
- HMV going into administration (for the second time in 6 years) with Sunrise Records buying the chain resulting in the closure of 27 stores (February 2019);
- Patisserie Valerie entering administration with Causeway Capital Partners (CCP) buying the chain. CCP is planning to keep all 100 stores open (depending on negotiations with landlords) (February 2019);





- Office Outlet entering administration confirming closure of all its stores (March 2019);
- Debenhams going into administration albeit immediately sold to a newly incorporated company controlled by Debenhams' lenders. It is expected that at least 50 of its 165 UK stores will close, 22 of which have already been announced and due to close in early 2020 (April 2019);
- Boots announcement of possible store closures to cut costs (April 2019); and
- Bathstore falling into administration potentially resulting in the closure of around 135 stores (subject to whether administrators sell the business).

1.2.9 It is clearly evident that current trading conditions for a number of retailers are tough. Such 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. As a consequence, a greater proportion of comparison goods expenditure is being claimed by a smaller number of centres of sub-regional or regional importance.

Uncertainty Surrounding Brexit

1.2.10 At the time of writing the final results of the Brexit negotiations remain uncertain. If a deal is finally agreed by Members of Parliament, and subsequently accepted by the EU, plans will be in place to proceed with the terms of a 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 tends to reduce investment expenditure.

1.2.11 The actual implications of Brexit on retailing in the UK will depend on the final outcome. GlobalData highlight three key implications as a result of Brexit:

- **Inflation will drive up food retail** - Brexit outcomes that create trade diversion between the UK and EU will see a potential steep increase in food prices. Higher import costs (through tariffs and the falling pound) that retailers will in part pass to consumers as well as lack of availability will result in limited supply which would see prices on basic foodstuffs rise.
- **Non-food categories will feel the brunt of reduced spending** – non-food growth is expected to slow significantly in the event of a no deal, with the forecast rise in inflation failing to offset a drag on consumer confidence and a sharp decline in volume growth.



- **Consumer confidence will continue to decrease in face of prolonged uncertainty –**
A no deal Brexit or delayed withdrawal will have an effect on lowered consumer confidence. If a Withdrawal Agreement is passed, there will be a minimised effect of lowered confidence on retail spend.

1.2.12 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.

1.3 The Continued Rise of the Grocery Discounters

1.3.1 Shoppers have turned away from food superstores in recent years. Mintel attributes the problems which face superstores to two principal factors.

1.3.2 Firstly, many young people are choosing to rent within or close to town and city centres. As a consequence, many undertake sporadic food shopping and often eat out, use takeaways, or buy instant meals. Accordingly, when young people undertake food shopping, they often have no greater need than that which can be serviced by a convenience store.

1.3.3 The second factor is the growth of discount operators, which have become more mainstream in both their offer and market positioning. Mintel suggests that the improvements in discounters' offer, such as wider ranges, better fresh foods and more premium foods, means that they have become an attractive alternative to both large food superstores and to convenience stores.

1.3.4 As a consequence, the 'big four' foodstore operators (Asda, Morrison's, Sainsbury's and Tesco) have become circumspect in respect of new store openings and, indeed, have closed a number of existing foodstores. All four have suffered significant declines in their market share over the past four or five years. As Figure 1.4 below indicates, Tesco has suffered a 1.9 percentage point reduction in its share of the food retail market between 2012 and 2018, and Morrison's has suffered a 1.4 percentage point reduction in market share. Considered together, the market share of the big four foodstore operators has declined from 59.6% in 2012 to 53.8% in 2018 (a reduction of 5.8 percentage points). In contrast, other retailers – most notably Aldi and Lidl – have benefitted from increases in their market share. Aldi's market share increased from 2.6% to 6.6% (equating to an increase of 4 percentage points) between 2012 and 2018.



Figure 1.4: Market Share of Key UK Food Retailers

Operator	2012	2013	2014	2015	2016	2017	2018
Tesco	23.9%	23.0%	23.3%	22.8%	22.6%	22.1%	22.0%
Sainsbury's	13.1%	12.9%	13.1%	12.8%	12.6%	12.2%	12.1%
Asda	13.3%	13.0%	13.0%	12.0%	11.3%	11.4%	11.3%
Morrison's	9.3%	8.9%	9.2%	8.6%	8.6%	8.3%	8.4%
Aldi	2.6%	3.3%	4.3%	4.8%	5.5%	6.0%	6.6%
Co-operative Food	5.4%	5.1%	5.2%	5.1%	4.9%	4.7%	4.7%
Waitrose	3.6%	3.7%	3.8%	4.0%	3.9%	3.9%	3.9%
Marks & Spencer	3.7%	3.7%	3.9%	4.0%	4.1%	4.1%	4.1%
Lidl	2.0%	2.0%	2.2%	2.5%	3.2%	3.2%	3.3%
Iceland	1.9%	1.9%	2.0%	2.0%	2.0%	2.0%	2.2%

Source: UK Food & Grocery Retailer Update, GlobalData.com

- 1.3.5 The most recent strategy of the big four operators is twofold: (1) the development of smaller store formats for top-up food shopping; and (2) the reconfiguration and refurbishment of existing foodstores.
- 1.3.6 The development of smaller store formats (Sainsbury's Local, Tesco Express, Marks & Spencer Simply Food, and Little Waitrose) has been in response to changing food shopping habits and the move from weekly shops to more frequent smaller shops. These smaller store formats are important in driving footfall in smaller district/town centres and in some cases act as a vital 'anchor store'.
- 1.3.7 In terms of the reconfiguration/refurbishment of existing foodstores, in some cases, product lines are being reduced and pricing is being made straightforward. Some operators are looking to introduce other uses/concessions to take existing floorspace and Sainsbury's acquisition of the Home Retail Group has allowed it to introduce Argos (which it now owns) into its stores. Small concessions of Habitat are also currently being tested within a number of Sainsbury's. The introduction of additional uses/concessions in foodstores has the potential to take trade away from town centres.
- 1.3.8 Aldi and Lidl have both sought to take advantage of the structural changes in the food retail market and have announced ambitious store opening targets that will further increase pressure on the big four operators. Aldi has identified major expansion plans with a target to have more than 1,000 stores by 2022. Aldi's plans include three formats: standard stores of between 18,000 sq ft and 20,000 sq ft with a minimum of 70 parking spaces; the 'Small Aldi' format of between 10,000 sq ft and 14,000 sq ft with a minimum of 40 parking spaces; and, the 'City Aldi' format of between 7,000 sq ft to 10,000 sq ft with no parking spaces offered. Aldi is understood to be considering all





types of property, including development sites, mixed-use schemes, retail parks, high streets, shopping centres and roadside.

- 1.3.9 Lidl plans to expand to trade from a portfolio of 1,200 UK stores in the coming years. Lidl's future requirements reportedly comprise units of between 20,000 sq ft and 30,000 sq ft, with sites of 1.5 acres required for standalone units and up to 4 acres for mixed-use schemes.

1.4 The Food and Drink Sector

- 1.4.1 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. Eating out has become increasingly popular and both national multiples and independents have benefitted from the additional expenditure which has resulted.
- 1.4.2 Local Data Company (LDC) reports that the number of food and drink outlets in town centres had gone up by 6,000 between 2011-2016 whilst the number of town centre bars, pubs and night clubs fell by about 2,000. The largest food and drink growth areas included lounge bars (116%), cake makers (51%), juice bars (46%) and coffee shops (31%). In 2017, LDC reported the number of new food and beverage outlets opening in the UK reached a peak of around 743 new units per year. However, over the last year or so there is evidence that the food and drink market is becoming saturated with the likes of the following outlets restructuring, closing outlets, or going into administration:
- Byron Burger;
 - Ed's Easy Diner
 - Giraffe;
 - Prezzo;
 - Strada;
 - Jaime's Italian;
 - Gourmet Burger Kitchen; and
 - Chimichanga.
- 1.4.3 Food and drink operators now require units which are in amongst the retail heart of a centre. Food and drink operators (particularly national multiples) can be particularly attractive to landlords as long leases can often be agreed to due to the cost of fit-outs.





- 1.4.4 Mintel also reports that although the three biggest operators, Odeon, Vue and Cineworld, still dominate the cinema market and account for 60% of the total UK cinema screens, there has been a steep increase in the number of independent screens. Niche cinema operators, such as Everyman, Curzon and The Light, are considered to have the potential to be particularly complementary to shopping environments. Such cinemas have more modest land take requirements than large multiplexes, and therefore may have a greater chance of being incorporated in a mixed-use development. Mintel reports that the growth of 'event cinema' and diverse food and drink offerings provided by independents means cinema is becoming a destination for consumers who are not typical cinema fans.
- 1.4.5 The health and fitness sector has been buoyed by the popularity of budget gyms. Operators such as Pure Gym, The Gym Group and easyGym have an operational model which is based on low costs and high volume. Such gyms tend to have plenty of equipment in order to encourage users, but are characterised by basic fit-outs and limited staff. Many budget gym operators – including Pure Gym and The Gym Group – are actively seeking to bring forward additional facilities, with a wide range of properties (including old theatres, larger shop units and office space) having the potential to meet their needs. The Leisure Database Company suggests that there were around 300 budget gyms across the country in summer 2016, but that this figure has the potential to increase to around 1,000 by the end of 2019. Pure Gym is now the private health and fitness club market leaders in terms of both venue numbers (160 clubs) and memberships. The Gym Group and Anytime Fitness now also both have over 100 clubs, with Xercise4Less, having over 50 gyms.
- 1.4.6 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.



1.5 Governments Response to 'Transform Town Centres'

- 1.5.1 In the 2018 Budget the Ministry of Housing, Communities and Local Government (MHCLG) announced a consultation on new planning reforms with various initiatives suggested that would allow for a more flexible and supportive approach to help transform/revitalise town centres. The suggested initiatives included changes to Permitted Development Rights, business rate reliefs for small town centre businesses, and funding to help Councils in drawing up and implementing plans for town centres to adapt/respond to changes in the retail economy.

Changes in Permitted Development Rights and Use Classes

- 1.5.2 In October 2018 MHCLG issued a consultation document titled 'Planning Reform: Supporting the high street and increasing the delivery of new homes. The consultation period ended earlier this year. 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 GDPO:
- 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). There is a qualifying date of 29 October 2018 for the pre-existing use, a floorspace limit of 500 sq m, and it does not apply to a building that is, *inter alia*, Listed or within a Conservation Area. A prior approval application is required to assess impacts of the proposed change of use in respect to transport and highways, noise from neighbouring commercial and retail premises, and on whether there remains "*adequate provision of services*" in the area, particularly where the site is located within a shopping area, to ensure the sustainability of that shopping area.
 - 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. There is a qualifying date of 20 March 2013 for the pre-existing use, a floorspace limit of 150 sq m, and it does not apply to a building that is, *inter alia*, Listed or within a Conservation Area. As with Class JA a prior approval application is required including an impact assessment to assess that there is an adequate provision of existing services in the area.



- 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.

1.5.3 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

1.5.4 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. The Government's funding for business rates relief totals £900 million. Under the plan, small firms will receive a one-third discount on their rates bills for two years. The Chancellor indicated the business rate reliefs would introduce an average annual saving of £8,000 for 90% of independent businesses.

1.5.5 Whilst the cut to business rates for small businesses has been welcomed, there has been disappointment that the fund doesn't help medium and large high street businesses which have been hardest hit by rate rises.

1.5.6 At the same time as announcing business rate reliefs the Government also announced the introduction of a digital services tax from April 2020. The digital services tax is a levy against social media platforms, internet marketplaces and search engines. It is intended to be targeted at "*established tech giants*" rather than start-ups. The government is proposing a 2% tax rate against the sales that large digital companies make in the UK. It would be imposed on companies that are profitable and generate "*at least £500m a year in global revenue*".

Future High Street Fund

1.5.7 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, by using long term strategies. There was competition for the funding with local areas expected to partner with the private sector in their proposals, which should set *out* an overall vision of the specific



improvements that would contribute to its achievement. It is envisaged that the Fund will then co-fund projects such as:

- investment in physical infrastructure, including improving public and other transport access, improving flow and circulation within a town/ city centre, congestion-relieving infrastructure, other investment in physical infrastructure needed to support new housing and workspace development and existing local communities', and the regeneration of heritage high streets; and
- investment in land assembly, including to support the densification of residential and workspace around high streets in place of under-used retail units.'

1.5.8 A new High Streets Taskforce will also be created and funded, to support local leadership. The fund will also support the regeneration of heritage high streets (up to £55 million of the overall fund). 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.

1.5.9 The timescales for the Future High Streets Fund set out by MHCLG are as follows:

- 2018: launch of the full prospectus.
- Spring 2019: launch of the High Streets Taskforce.
- 28 March 2019: Stage 1 Expressions of Interest, with local authorities developing private sector partnerships to deliver capital projects.
- Summer 2019: gateway assessment, with bids to be taken to Stage 2 (and local areas working up more detailed business cases).



Appendix C

Stakeholder Engagement Statement



1.0 Introduction

- 1.0.1 This Stakeholder Engagement Statement sets out the engagement undertaken with key stakeholders to inform the preparation of the South Worcestershire Retail and Centres Study 2019.
- 1.0.2 In order to inform the qualitative retail needs assessment, a two-stage stakeholder engagement process was undertaken as agreed with the South Worcestershire Councils.
- 1.0.3 A list of the stakeholders contacted as part of the Study is provided at **Appendix A**.

2.0 Stage One Consultation

- 2.0.1 The first stage of consultation sought the views of the South Worcestershire Councils, EDOs, Worcestershire Local Enterprise Partnership, Town Centre Managers, Market Providers, West Mercia Police, Worcestershire Regulatory Services, Public Health and Worcestershire Business Central.
- 2.0.2 Contact details for the above stakeholders were confirmed with the South Worcestershire Councils. Each stakeholder was contacted via email, informing them of the study and asking for feedback on their local area. A briefing note was sent with the email to each stakeholder summarising the purpose and objectives of the Study. A copy of the briefing note is attached at **Appendix B**.
- 2.0.3 The initial email was sent to all identified stakeholders on 21 February 2019. The email invited comments concerning the city/town centres, specifically on the following:
- The strengths and weaknesses of the retail/leisure/provision within centres;
 - The opportunities and threats for centres; and
 - Suggestions for improvements to centres.
- 2.0.4 Feedback was requested via email or on the arrangement of a telephone conversation. The email requested that feedback was provided by 15th March 2019. A further email was sent out on 18th March asking those who hadn't yet responded to do so by the end of that week (22nd March).





3.0 Stage Two Consultation

- 3.0.1 The second consultation stage took the form of a round-table workshop session held at the Guildhall in Worcester City Centre on 8th April 2019 (8.30-10.30am). Stakeholders invited to the workshop included chambers of commerce, Worcester BID, shopping centre managers, town councils, neighbourhood planning forums, major retail property owners and their agents, significant store operators and relevant commercial property agents.
- 3.0.2 Invitations were sent out via email on the 25th February 2019 with a reminder sent on the 19th March 2019. Again, a briefing note was sent with the email to each stakeholder summarising the purpose and objectives of the Study. A copy of the briefing note is attached at **Appendix C**. Stakeholders were also sent out a feedback form inviting comments on the town centres which could be returned if a stakeholder was unable to attend the workshop event.
- 3.0.3 At the request of the South Worcestershire Councils, invitations to the workshop were also sent out to stakeholders who did return a feedback form as part of Stage One of the consultation process.
- 3.0.4 At the workshop itself a short presentation was given by WYG on the study and initial vitality and viability health check findings. A copy of the presentation is attached at **Appendix D**.

4.0 Feedback Received

- 4.0.1 Overall, 17 feedback forms were returned from stage one and stage two consultees. A summary of the comments made about each city/town centre is included at **Appendix E**.
- 4.0.2 14 people attended the stakeholder workshop session. They included representatives from Worcester BID, Droitwich Means Business, Portico, High Street Malvern, Chase Commercial, the Crowngate Shopping Centre, and South Worcestershire Councils. A summary of the discussions from this event are included at **Appendix F**.

5.0 Summary of Feedback

Stage One Stakeholder Feedback

- 5.0.1 Feedback was received on Worcester, Evesham, Droitwich, Great Malvern, Pershore and Tenbury Wells. No feedback was received on Upton-upon-Severn.





- 5.0.2 Overall, some common themes across the city and town centres in South Worcestershire emerged from stakeholder feedback.
- 5.0.3 It was recognised that the number of independent businesses across the centres in South Worcestershire is a strength and that they contribute to a centre's identity and help attract visitors. Similarly, the heritage and historic setting of the centres was also cited as a key asset with opportunities identified for maximising benefits from this.
- 5.0.4 In Worcester, Pershore, Tenbury Wells and Great Malvern, the range of leisure services and facilities was cited by stakeholders as key to the success of these town centres, while the good parking provision in Droitwich and Evesham's wide catchment area were also mentioned.
- 5.0.5 The expansion of out-of-town retail facilities and their influence on town centre retail provision was a common threat identified by stakeholders, as was the danger of further high street retailers failing and the loss of key anchor tenants from shopping centres and high streets. Identified weaknesses across the centres included poor connectivity between shopping areas and existing public transport links, and a perceived reliance in some of the town centres on an ageing demographic.

Stage Two Stakeholder Workshop Feedback

- 5.0.6 At the stakeholder workshop, feedback was received on Worcester, Evesham, Droitwich, Great Malvern, and Upton-upon-Severn but no comments directly relating to wither Pershore or Tenbury Wells were received.
- 5.0.7 At the stakeholder workshop session, the roundtable discussion covered a range of topics and themes. It was generally recognised that the role of centres was changing and that was a need for more of a diversity in land uses to counter the trend of retail closures. Opportunities to maximise the benefits of Click and Collect and other high street digital facilities were discussed and there was broad agreement on the need to avoid directly competition with out of town retail facilities.
- 5.0.8 Much of the discussion centred on Worcester. Stakeholders generally thought that the number of independent businesses within the City Centre was a positive and that efforts should be made to capitalise on this by marketing Worcester as an 'independent hotspot'. Some of the areas of the City Centre however were highlighted as needing improvement, in particular Angel Street and Lower Broad Street where several vacant units are in need of significant maintenance. The need for engagement with landlords was mentioned and some stakeholders felt that there is presently





little incentive for landlords of some of the 'problem' vacant units to carry out maintenance or to let them out.

- 5.0.9 Encouraging the conversion of upper storeys of retail units to residential use in Worcester City Centre was suggested as a way of encouraging more diverse uses to support the economy, It was mentioned that this may be difficult however due to some of the spaces being difficult or impractical for conversion.
- 5.0.10 Elsewhere, it was agreed that the appearance and general feeling of a centre is dictated by the quality and design of shopfronts. Efforts should be made to ensure that shopfronts are of the best quality and the adoption of shopfront specific SPDs was suggested. Other stakeholders highlighted the importance of making the most of the heritage and historic significance of the centres in South Worcestershire and making the retail environment more attractive in general for visitors.





Appendix Ci

List of stakeholders contacted





Contact	Organisation
Cassie Bray, Director of Business Engagement	Hereford & Worcestershire Chamber of Commerce
Linda Blake, Town Clerk	Malvern Town Council
Linda Blake, Town Clerk	Malvern Neighbourhood Planning Forum
Lesleyann Bruton	Tenbury Wells Town Council & Tenbury Wells Neighbourhood Planning Forum
Jo Adams	Upton-upon-Severn Town Council
Mark Keld	Droitwich Town Council
Stuart Carter	Evesham Town Council
Ann Dobbins	Pershore Town Council
Michael Lloyd	Crown Gate Centre Manager
Sam Pisani	Cathedral Square Centre Manager
Managed by Fisher German	Reindeer Court Centre Manager
Barton Willmore (Mark Harris)	Tallow Hill Retail Park Planning Agent
Julian Meredith	Riverside Centre Manager
Joe Newton & Curson Sowerby	Malvern Retail Park
Richard Tomlinson	Fisher German
George Xydias	Andrew Grant
Tony Rowland	Timothy Lee & Griffiths (Retail agent)
Tom Tarver	Vale of Evesham Commerce & Tourism Association (VECTA)
John Dillon	Commercial Property Agent & member of Droitwich Means Business
Julie Tucker	Evesham Town Plan Committee Chair
Vivienne Findlay	Owner of Hotel Shop & Chair of Droitwich Means Business
Robert Hepworth	CWC Group (owners of former Baxenden development site, Droitwich)
Daren Eden	Pershore Business Rep, owner of Angel Hotel, Pershore
	Harris Lamb Property Agents





Contact	Organisation
Owen Francis	Crown Estate
Chris Marks	Owner of Iapetus Gallery, Malvern & Worcester
Matt Nicol	Nicol & Co
Sam Tarren	Investment Director, Spirit Ventures
Annette Keyworth	Upton Business Association
Tim Evans	Owner of Toys & Games, Worcester
Paul Meredith	Owner of The Zip Yard, Worcester
Jane Knowles	Barnards Green Traders Association
Sarah Thompson	Tenbury Chamber of Trade
Sean Austin	
Donald Mackenzie	Malvern Link Traders Association
Mike Stephenson (Crime Risk Manager)	West Mercia Police
Luke Willets	Worcestershire Local Enterprise Partnership
Phoebe Dawson	Worcester BID
Kevin Aisbitt	Worcestershire Business Central
Dermot McGillicuddy	LSD Promotions
Henry Harbord	Worcestershire Highways (Evesham Transport Strategy lead officer)
Cllr Ken Pollock	Worcestershire Highways (Evesham Transport Strategy Chairman)
Cllr Richard Morris	Wychavon DC Portfolio Holder for Economic Growth and Tourism
Vic Allison	Wychavon DC Deputy Managing Director
Phil Merrick	Wychavon DC Head of Economy and Environment
Chris Brooks	Wychavon Head of Regeneration
Mark Hughes	University of Worcester





Contact	Organisation
Bill Simpson	Hop Market Association
Janet Yates	Worcester EDO Enterprise & Business
Helen Mole	Worcester EDO Local Centres
Val Floy	Worcester Cathedral Chief Operating Officer
Luke Willets	Worcestershire LEP
Stuart Emmerson	Worcestershire LEP
Roger Sutton Treasurer WMASA	WMASA
Kevin Bellfield	Commercial Director, First Group
Mick Hurst	Vice Chair, Vale of Evesham Commerce & Tourism Association
Robert Higham	Worcester Diocesan rep on Worcester BID
Nicki Williams	CEO of Heart of Worcestershire College
Tracy Perkins	Town Panel Coordinator Wychavon DC
Angela Taylor	Tourism Officer Wychavon DC





Appendix Cii

Stakeholder Stage One Engagement - Briefing Note



Introduction

Worcester City, Malvern Hills District and Wychavon District Council (South Worcestershire Councils) have instructed WYG Planning to undertake the **South Worcestershire Retail & Town Centres Study 2019**. The study will update the Council's evidence base in respect of the retail and commercial leisure performance of the defined city/town centres, provide guidance on the 'need' for new retail and commercial leisure floorspace, and provide strategic advice to ensure that the town centres remain vibrant and viable locations.

Our study will provide a credible and robust evidence base, which is fully compliant with the National Planning Policy Framework (NPPF), which the Council's will be able to use to inform policies and land use allocations. This includes providing input to the emerging South Worcestershire Development Plan Review which will guide development in the borough to 2041. The Study will also be used by the South Worcestershire Councils to assist in the determination of potential planning applications for new retail and commercial leisure development.

The Retail and Town Centres Study is due to be completed and published in July/August 2019.

Objectives of Study

The main objectives of the study are to:

- Define the catchment areas of Worcester City and Great Malvern, Droitwich Spa, Evesham, Pershore, Upton-upon-Severn and Tenbury Wells Town 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.

A telephone household survey, involving 1,700 interviews, has been commissioned as key market research for the study. The telephone household survey will seek to establish, *inter alia*, existing retail and leisure habits, market shares, inflows and outflows of expenditure, and views of the city/town centres in South Worcestershire.

Feedback from Key Local Stakeholders

In order to inform the retail and leisure study we are seeking input from key local stakeholders including:

- Views on any strengths in centres retail and leisure provision;
- Views on any weaknesses in centres retail and leisure provision;
- Views on potential threats to centres;
- Views on potential opportunities for centres; and
- Suggested improvements to the defined centres in South Worcestershire.

We would be grateful if you could fill in the attached feedback form and send it back via email to John.Shakespeare@wyg.com by Friday 15th March.





Appendix Ciii

Stakeholder Stage Two Engagement Briefing Note



Introduction

Worcester City, Malvern Hills District and Wychavon District Council (South Worcestershire Councils) have instructed WYG Planning to undertake the **South Worcestershire Retail & Town Centres Study 2019**. The study will update the Council's evidence base in respect of the retail and commercial leisure performance of the defined city/town centres, provide guidance on the 'need' for new retail and commercial leisure floorspace, and provide strategic advice to ensure that the town centres remain vibrant and viable locations.

Our study will provide a credible and robust evidence base, which is fully compliant with the National Planning Policy Framework (NPPF), which the Council's will be able to use to inform policies and land use allocations. This includes providing input to the emerging South Worcestershire Development Plan Review which will guide development in the borough to 2041. The Study will also be used by the South Worcestershire Councils to assist in the determination of potential planning applications for new retail and commercial leisure development.

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- 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.

A telephone household survey, involving 1,700 interviews, has been commissioned as key market research for the study. The telephone household survey will seek to establish, *inter alia*, existing retail and leisure habits, market shares, inflows and outflows of expenditure, and views of the city/town centres in South Worcestershire.

Workshop for Key Local Stakeholders

In order to inform the Retail and Town Centres Study we are seeking input from key local stakeholders and have therefore arranged a workshop event starting at 08.30am on Monday 8th April at the Assembly Room, Guildhall, Worcester.

At the workshop a short presentation will be given by WYG Planning to summarise the commission objective and initial study findings. The presentation will then be followed by round table discussions where the following, *inter alia*, will be discussed:

- Views on any strengths in centres retail and leisure provision;
- Views on any weaknesses in centres retail and leisure provision;
- Views on potential threats to centres;
- Views on potential opportunities for centres; and
- Suggested improvements to the defined centres in South Worcestershire.

We hope you can make the workshop event and would be grateful if you could respond to John.Shakespeare@wyg.com to confirm whether or not you are able to attend.





Appendix Civ

Stakeholder Stage Two Workshop Presentation





South Worcestershire Retail and Centres Study

Stakeholder Workshop

Introduction & Purpose of Workshop



Introduction



- WYG Planning was commissioned in December 2018 to undertake a Retail and Centres Study for South Worcestershire area
- A key evidence base document to inform policies and land use allocations in the South Worcestershire Development Plan Review
- Also an important document to assist in determination of planning applications for new retail and leisure development
- Study due to be completed and published by the end of August 2019



Purpose of Stakeholder Workshop



To assist in establishing:

- Views on any strengths, weaknesses, opportunities, threats in centres/retail and leisure provision
- Any retailer and leisure provider requirements/needs
- Suggested improvements to the defined centres



Scope of Study & Survey



Scope of the Study



- To identify quantitative and qualitative retail requirements for the towns
- To identify quantitative and qualitative commercial leisure requirements for the towns
- To undertake health check assessments of the vitality and viability of Worcester City and Great Malvern, Droitwich Spa, Evesham, Pershore, Upton-upon-Severn and Tenbury Wells Town Centres
- 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 policies for their effectiveness in maintaining the vitality of the centres and providing evidence to support proposed changes to policy

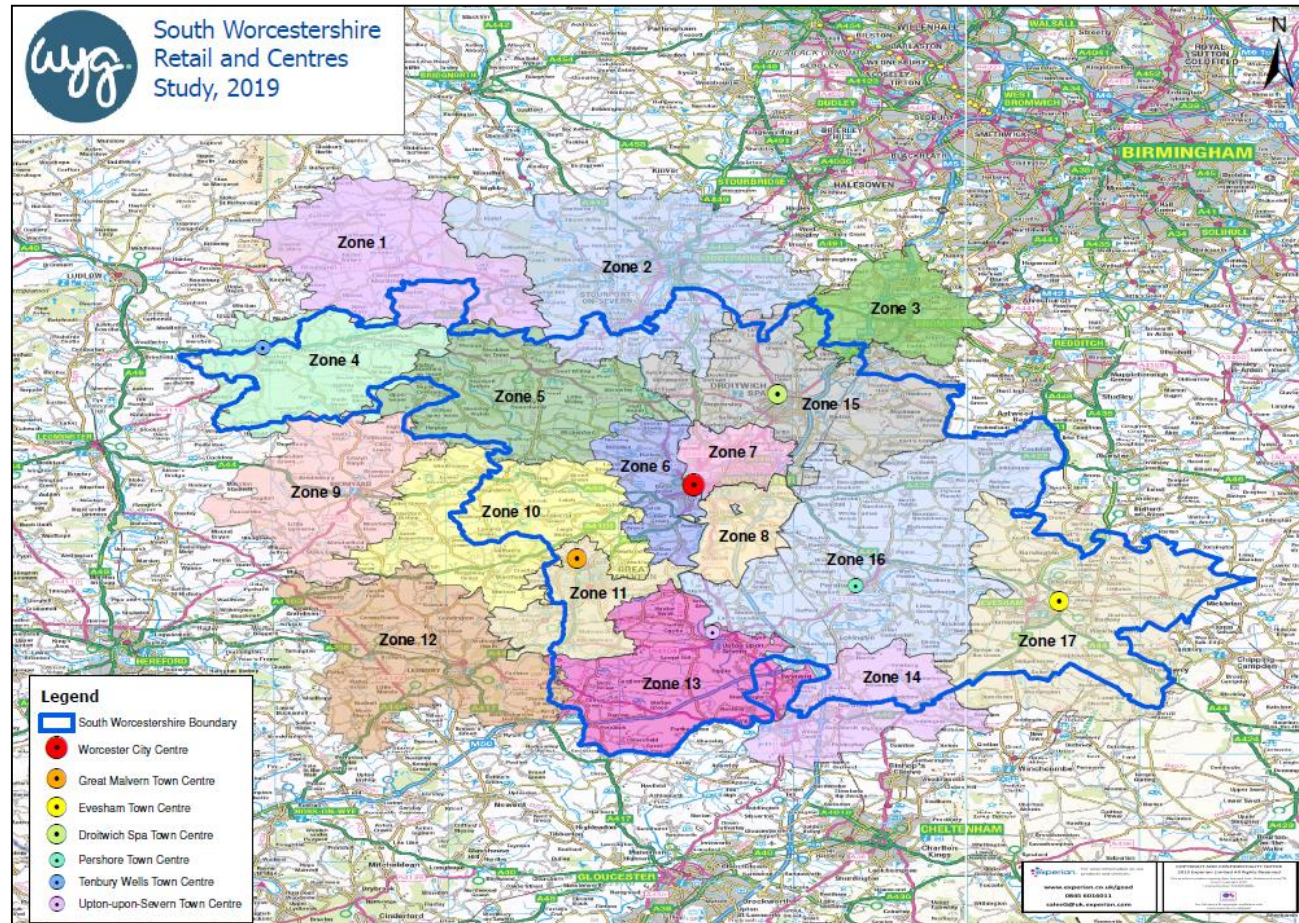


Survey of Household Shopping Patterns



Household Telephone Survey

- 1,700 interviews undertaken across 17 Zones by market research company NEMS
- Survey will inform quantitative and qualitative retail and leisure assessment
- 37 questions in total
 - identify shopping patterns
 - identify leisure patterns
 - views on centres



Town Centre Health Checks – Findings



Worcester City Centre



- Vacancies fallen over the past 5 years albeit still remain above UK average
- Despite good comparison goods provision, the sector has weakened over the past 5 years
- Local highway network can often become congested, particularly at busy periods
- Bus Station is unwelcoming and of poor environmental quality
- Against the national trend, pedestrian footfall in the City Centre has increased in recent years.
- City Centre provides a pleasant and attractive environment. The Shambles and Angel Place/Friary Walk will see improvements shortly



Evesham Town Centre



- Vacancy rate is well above the national average
- Provides a number of attractive and well-preserved historic buildings
- Good financial and business service offer
- Local highway network can often become congested
- Comparison goods sector not particularly strong and has weakened
- Redevelopment of Riverside Shopping Centre provides a significant opportunity to improve leisure service offer and/or bring other non-retail uses into the town centre



Droitwich Town Centre



- Strong convenience goods provision
- Under-provision of leisure services in the town centre, especially those serving the 'evening economy'
- High street is attractive
- Parts of Ombersley Road and St Andrews Street would benefit from additional investment
- Low overall crime rate
- Vacant Raven Hotel does not contribute to the vitality and viability of the centre



Great Malvern Town Centre



- Attractive built environment with well-tended public spaces
- Good leisure offer serving both the daytime and evening economies
- Good financial and business service offer
- Attractive independent offering catering for both the local and visitor economy
- Low vacancy level
- Steep topography makes access difficult for those with mobility problems
- Car Parking provision during peak times struggles to meet demands



Pershore Town Centre



- Low, and decreasing, vacancy levels
- Independent businesses contribute to a distinctive shopping offer
- Low levels of footfall to the north of the town centre
- High proportion of smaller retail units which may not meet modern retailer requirements
- Attractive and historic built environment
- The local highway network can become busy, limiting pedestrian connectivity and detracting from environmental quality



Tenbury Wells Town Centre



- Attractive, compact and walkable
- Relatively isolated and poorly connected by public transport.
- Good level of services catering for the day to day needs of its local residents
- Convenience goods provision has been significantly strengthened following opening of the Tesco foodstore
- Low vacancy rate
- Pressure on car parking spaces within the town centre
- Financial banking/building society sector limited to one high street bank



Upton-upon-Severn Town Centre



- Good food and drink offer that benefit from several high-profile annual events
- Low levels of footfall out of season
- Attractive and historic built environment in a riverside location
- Very low and decreasing vacancy level
- Poorly connected by public transport
- Convenience goods offer limited with only 2 relatively small units catering for food shopping needs



Discussions



Views on the following areas is being sought:

- What are the key strengths in centres retail and leisure provision?
- What are the weaknesses in centres retail and leisure provision?
- What are the current threats and negative trends?
- What are the opportunities for the town centres?
- Are any improvements needed to the town centres?
- What are the key priorities for planning policy in South Worcestershire to support town centres?





Appendix Cv

Stakeholder Stage One Engagement - Summary of Feedback



Worcester City Centre

Strengths:

- Combination of 'high street' name shops and restaurants in the same proximity as small independent businesses.
- The City has a distinct character and offers a nice ambience for shopping.
- Worcester offers more than just a shopping experience – the cathedral, riverside, cricket ground, racecourse and heritage means there is wide offering to attract visitors.
- Strong leisure offer e.g. cinemas, theatre, pubs, restaurants, gyms, museums.
- City Centre living – there has been a lot of residential development over the past few years meaning there is a good catchment area for people to walk into the city centre and add to the vibrancy.
- The City still has plenty of community facilities and services for the local population e.g. community halls, churches, schools, colleges.
- Good events programme which grows year on year.
- Weekly markets.
- Plenty of affordable car parking.
- Busy retail centre.
- Two cinemas.
- Large number of independents.
- Good cultural offering (music venues, theatres)
- Engaged City Centre partners.
- Rent is reasonable.

Weaknesses:

- John Lewis – the city does not have one. This would be a key anchor store to attract shoppers, other shops and raise the profile of Worcester
- Theatre/performance venue – the main theatre (Swan Theatre) is away from the City Centre and is not of the same calibre as theatres in neighbouring areas e.g. Malvern. This means it does not attract some of the big 'names'
- Not enough good quality hotels and limited bed space
- Lack of large leisure venue (e.g. snow dome, skating rink) which would attract people from a large area
- 'Grot spots' in the City Centre e.g. Angel Street which detracts from the overall offer
- Leisure offer not diverse enough (e.g no bowling alleys, indoor golf etc)
- High vacancy rate in some areas



- Deteriorating reputation due to traffic congestion and car park costs.
- Withdrawal of park and ride facilities and growing congestion has weakened attractiveness of the city centre
- Public transport in the evening is poor
- the recent redevelopment associated with Cathedral Square missed the opportunity to strengthen the pedestrian linkage between the High Street and the Cathedral area. we were given a visually brutal, poorly conceived in urban design terms, upgraded A road with vehicular 30 mph priority rather than a traffic calmed solution that would be attractive to pedestrians and enhance permeability and the integrity of the city centre
- Too many coffee shops

Opportunities:

- A new hotel; grade A office accommodation; and development/improvement plan for the 'grot' spots
- Opportunities for a live music venue or ice rink
- Early evening opening hours to encourage office workers to stay in city centre for longer
- More public art
- Making more of the riverside and heritage potential of the city centre.
- Enhance vitality of the gateways in the city centre e.g at both railway stations and the Cornmarket area
- Continued diversification

Threats

- Housing developments on the edges of the City may mean residents travel to other towns/cities
- Uncertainty of anchor stores Debenhams, Marks & Spencer and House of Fraser
- One closure away from a big vacancy in town centre
- Maintaining footfall and spend to reduce risk of increasing number of empty units
- General contraction of retail
- Increasing online shopping will hit the town centre
- Traffic congestion.
- Out-of-centre retail development

Suggested ways of improving the centre:

- Deliver the Worcester tourism strategy and action plan





-
- Invest in 'grot spots'
 - Implement the Worcester Masterplan
 - Need to adapt to suit the consumers of the future
 - Support the delivery of training for shops/businesses to help them adapt to new ways to trade – e.g online shopping/click and collect/marketing etc.
 - Increase frequency of train services
 - Development at run down sites like St Martins and the old Co-op



Evesham Town Centre

Strengths:

- Good cafes and increasingly popular evening economy
- Growing range of places to eat
- Good leisure centre just outside the town centre
- Town Centre easily accessible from the train station
- Centrally located post office and still plenty of high street banks
- Riverside is an attractive area with great potential
- Unusual and good cinema just outside of the town centre on Port Street
- New Waitrose store is a bonus
- Wide catchment
- Generally good public realm
- The 'Enlighten Project'
- Almonry Museum

Weaknesses:

- Riverside Shopping Centre is struggling and has high vacancy rate
- Generally poor retail offer
- Low footfall
- Traffic at all times of the day, not just rush hours
- Evesham has suffered with shop closures and out of town retail development
- High number of vacancies contribute to a 'run down' feeling
- Relationship between railway station and town centre is poor
- Poor links to natural/historic assets including the Abbey, riverside and the Almonry
- Too few well known chain shops
- Art Centre too far away from the centre of town
- No proper live music venue

Opportunities:

- Future High Streets Fund and investment into or replacing the Riverside Shopping Centre
- New housing being built will mean more visitors/customers
- Encouragement of small/independent businesses to town centre
- Increased leisure provision e.g ten pin bowling, ice rink
- New Waitrose suggests there is scope for more high value offerings
- Improve linkages between town centre and railway station





- Promotion of cycling and walking would increase footfall and reduce traffic
- Investment into the public realm along Bridge Street and Market Place could generate a socio-economic east-west axis to provide a focus for investment and development
- Should be another cinema servicing a different market
- More facilities for teenagers e.g. bowling, laser tag, ice skating
- Provide public transport to/from the town centre to the

Threats:

- If traffic and congestion issues are not addressed, further investment may not make much difference
- Without investment, more and more customers will go to out of town retail developments
- Out-of-centre retail parks

Suggested ways of improving the centre:

- Limit the growth of out-of-town retail parks
- Greater focus on the Town Centre
- Riverside is an underdeveloped asset
- Development of specialised markets that celebrate local produce
- Pursuing a comprehensive parking strategy
- Seek to develop the town centres USPs
- Consider a green infrastructure strategy to enhance the environment of the town centre
- Move the arts centre into town
- Provide a live music venue



Droitwich Town Centre

Strengths:

- Range and number of multiples represented
- Regular festival programme and accessible green space in town centre
- Range and volume of car parking facilities
- Traffic moves freely
- Strong mix of both national retailers and local independents

Weaknesses:

- Locations of multiples draws footfall from the high street
- Limited night-time economy
- Lack of central hotel and quality restaurant offer
- Civic leadership elderly and behind the times
- Access and signage is generally poor
- Lack of a 'gateway' into town centre
- High street has poor footfall and feels cut off from the rest of the Town Centre
- Shopping centre more functional than attractive
- Station not well linked to town centre
- Town does not have a Chamber of Commerce

Opportunities:

- Creation of pedestrian priority areas and cycle route improvements
- Improve existing transport hubs
- Improve signage and pedestrian routes
- Enhance presentation of town and town centre heritage
- Maximising the town's brine heritage
- Large vacant site between the town centre and station offers good development potential

Threats:

- Further failure of multiple retailers leaving vacancies in the shopping centre
- Lack of investment in edge of centre development sites
- Further delay to Raven Hotel redevelopment
- Independents on the high street struggle
- Development site near the station could be a risk if left vacant or developed badly

Suggested ways of improving the centre:





-
- Better connectivity from the station
 - A unified business voice representing the town positively





Great Malvern Town Centre

Strengths:

- A good range of retail, leisure and services, including a nationally significant theatre complex, high quality parks and adjacent Area of Outstanding Natural Beauty
- The heritage offer of Great Malvern is exceptional, and worthy of consolidation and further development to generate increased visitor attraction
- Great Malvern has well maintained, good quality public realm.

Weaknesses:

- The socio-economic offering of Great Malvern Town Centre is directly linked to the existing older demographic living immediately adjacent. This limits its appeal to other age groups and poses a strategic challenge should the demographic profile of the town centre and its visitors change in future. For example, the night-time economy is under-developed and stagnant, currently;
- There is an incorrect perception that parking is limited in Great Malvern Town Centre, despite significant free on-street parking within a very short distance of the main retail core and a number of well-positioned off-street cheap car parks, which offer discounts for local residents
- It is perceived that the historical setting poses significant constraints in respect of land use, which may be stifling innovation, particularly within the context of regeneration and town centre development.

Opportunities:

- The adjacent Malvern Hills AONB attracts 1 million visitors each year
- Improved transport links between railway, the Malvern Hills and the town centre could be a driver of increased footfall and economic growth
- Investment into the public realm and redevelopment of vacant land between Waitrose and the town centre

Threats:

- Extensive on road parking at Graham Rd and Church St inhibits access and causes congestion
- Malvern Retail Park and Malvern Link provide a range of facilities not available in the Town Centre – it is important they don't try and compete with each other
- New developments need to be fully integrated into existing sustainable transport networks

Suggested ways of improving the centre:





-
- More cycle parking and encouragement of electric bikes will attract more people into the town centre
 - Revision of TROs on bus routes will increase the efficiency of bus services



Pershore Town Centre

Strengths:

- Lots of independents
- Loyal customer base
- Good arts centre (No. 8)
- You can get everything you need in the centre
- Asda supermarket
- Wide footpaths
- Patrolled by parking attendants
- Attractive and well maintained
- Good food + drink offerings
- Town centre used by locals and visitors equally – still feels 'lived in'
- Good car parking provision

Weaknesses:

- May need a bigger supermarket
- A long way from the station to the town centre
- Caters to older [elderly] people
- Lack of diverse leisure offer
- Town perhaps lacks a clear 'identity'
- Relationship between railway station and town centre is poor
- Broad St streetscape dominated by the car parking
- The town doesn't make enough of it's riverside location

Opportunities:

- New housing will grow population and customer base
- New parkway station will be good for the town
- Long term solution to reduce parking on Broad Street may open up the area for a market or for street cafes
- There is a need for a single 'tourism voice' in the town
- Creating a link to the riverside
- Consideration of a weight limit on Pershore bridge to suppress 'through' movements of HGV traffic

Threats:





-
- The loss of the 'Belle House' restaurant would weaken the food offer in the town considerably
 - General decline in retailing

Suggested ways of improving the centre:

- Better public transport links, specially to/from the station
- Pershore Town Plan has some suggestions





Tenbury Wells Town Centre

Strengths:

- well maintained and good quality public realm, which provides an attractive, historic streetscape for residents and visitors;
- a good mix of retail, service and leisure opportunities in the town centre;

Weaknesses:

- There is no railway station within the town, the nearest is in Ludlow (7 miles away) and Ludlow is a significant competitor. Or Leominster for the North / South line from Manchester to South Wales and Worcester or Kidderminster for Birmingham and London. This may be supressing visitor growth.

Opportunities:

- There is an opportunity to maximise the potential of the historic environment/conservation area
- Tenbury is a significant tourism centre and has several festivals. It also has strong links to the local farming economy and opportunities here could be explored and maximised

Threats:

- Bus services are under review
- Tenbury has an ageing population which may impact on long term sustainability of the retail/service offer
- Retail + development opportunities are constrained due to flooding, topography and access issues

Suggested ways of improving the centre:

- Enhanced public events
- Consider a green infrastructure strategy





Appendix Cvi

Stakeholder Stage 2 Engagement - Summary of Stakeholder Workshop Discussions



Worcester City Centre

- The number of independent retailers in Worcester is a real positive and opportunities should be sought to encourage more independent traders in the City Centre.
- Stakeholders suggested that Worcester could carve out a niche by marketing itself as an 'independent hotspot'.
- Some of the vacant units in the City Centre have become 'grot spots' as landlords are not being incentivised to fill them which are then left to get ever more untidy/unsightly
- The Crowngate Centre provides a different offer in the City Centre as a home to the major stores
- Some units in the city centre are poor quality and look a mess, especially on the upper levels.
- Some units have vegetation growing out of them on upper storeys which looks particularly messy
- It was suggested that alternative uses could be encouraged on upper levels in the City Centre, especially residential.
- It was mentioned that a survey was done 10-20 years ago which found surprisingly little available space on the upper storeys. Access was an issue and some of the spaces were quite awkward making conversions difficult or impractical.
- If more residential uses are to be introduced into the City Centre, more services will need to be provided to cater for the new residents e.g. gyms, yoga studios, bakeries, shops selling local produce.
- All services should be available by foot and available in the evenings to encourage people to stay in the City Centre.
- Encouraging residential development for workers, young people and those who don't drive will support the City Centre economy.
- It was recognised that the retail landscape is rapidly changing and so too are patterns of consumer behaviour.
- Lower Broad Street has a poorer environmental quality along with Angel Street.
- Vacant units and lower footfall are connected, and crime rates are often higher here.
- There is a need to engage with landlords. Irresponsible landlords can have a negative impact on the City Centre if units are left vacant
- There is no definitive list or register of landlords and the Council and it is not known who is responsible for certain units in the City Centre.
- The University of Worcester is expanding which presents a key opportunity to capitalise on this for the benefit of the City Centre

Evesham Town Centre





- It remains to be seen what effect the new Waitrose store has on the Town Centre and whether it will attract more visitors or not.
- The out of town retail parks have impacted the Town Centre, drawing customers away and reducing demand from retailers for town centre units.
- The Riverside Shopping Centre was purchased with its redevelopment in mind. Proposals for the centre include a residential-led mixed use development on site incorporating enhanced leisure facilities including a cinema/theatre and new restaurants.
- Evesham has 3 key assets – The River Avon, open meadows and a nice historic centre. At present, not enough is being made of these assets.
- Planning for the Town Centre needs to be pro-active in its approach
- Dwell time needs to be increased in Evesham which may result from alternative land uses and diversification of the Town Centre. Bold thinking is needed.

Droitwich Town Centre

- The 'overall experience' of visitors to the Town Centre needs to be looked at
- Convenience goods provision is in the wrong place and has contributed to a fragmented town centre.
- On future retail developments, more of a joined-up approach is needed.
- Occupiers in Droitwich High Street have previously been offered grant money to improve/maintain units to a better standard. This scheme was difficult to administer but uptake was okay

Great Malvern Town Centre

- Malvern's biggest problem is that there are three separate centres which each one seeing itself as a separate entity. Together they would have more clout.
- Out of centre retail parks take some trade away.
- A stakeholder mentioned that they would like to see more responsibility for the Town Centre being taken by local groups. A lack of 'joined up' governance means that responsibility for certain things (e.g the broken fountain) was unclear.
- Town Centre signage needs to be cleaned and in general, the Town Centre needs to be made more welcoming to visitors.
- Businesses should try and open 7 days a week or at alternative times to capitalise on different markets e.g people returning home after work in the evenings.





- The theatres draw people into the Town Centre but when they are there, it is recognised that there are few other activities to encourage them to stay on.
- Malvern Shopping Park is both good and bad for the Town Centre. It helps to draw people in to Malvern from surrounding areas who may then visit the Town Centre, but it also attracts people who may have visited the Town Centre to shop out of town instead especially as the retail park is open on Sundays and later into the evening

Upton-upon-Severn Town Centre

- The lack of convenience goods provision within Upton is due to its size and the market it serves. It is not necessarily considered to be a weakness

Tenbury Wells and Pershore Town Centres

- No specific comments were made in connection with these Town Centres

General non-centre specific comments

- The appearance and general feeling of a town or city centre is dictated by the quality of shopfronts. Badly maintained or poor-quality signage makes a huge difference and every effort should be made to ensure that signage is of a good quality. The adoption of shopfront SPDs by the LPAs was suggested.
- Planning for retail and town centres needs to be holistic and not just take the short-term impacts of development into account.
- More should be made of the historic significance and heritage of South Worcestershire. York, Winchester and Bath were given as examples of areas which benefit from tighter planning controls over the appearance and quality of shop frontages.
- 'Virtual shopfronts' and vinyls on the windows of vacant units are a good idea and benefit a centre, but they are expensive. There is support for this, but it may take partnership working between Councils and other groups (e.g. BIDs, parish councils etc) and it needs to be a team effort.
- A 'problem property group' was suggested as an idea to bring together stakeholders to address 'grot spots' in city/town centres.





- The use of Compulsory Purchase Orders for longstanding vacant units could be a deterrent/solution to the problem of bad or absent landlords but they are high risk, potentially expensive and may not gain political favour
- When decisions are made about a centre, customers should be consulted, and account taken of what they want
- There was strong support for the encouragement of Click and Collect facilities and a recognition that enhanced digital facilities in a centre were positive as they encourage linked trips, increased dwell time and may encourage more spending.
- Electric vehicles, ULEZs and the rise of internet shopping will all have an impact on town/city centres. Planning needs to take account of this and designated City and Town Centre boundaries may need to be dynamic to reflect this changing retail environment



Appendix D

Analysis of Retail Market Share Patterns



1.1 Introduction

- 1.1.1 Drawing on the findings of the household telephone survey this appendix analyses the convenience and comparison goods retail market share patterns within the Study Area.
- 1.1.2 An analysis of leisure market share patterns is provided as part of the commercial leisure need assessment set out in Appendix I of the study.
- 1.1.3 This section contains a summary of the convenience and comparison goods shopping patterns within the study area. Both main food and top-up convenience goods shopping patterns are analysed and for comparison goods - combined comparison goods shopping patterns are examined.

1.2 Convenience Goods Shopping Patterns

Main Food Shopping

- 1.2.1 **Appendix Di** summarises the proportion of main food shopping trips which are directed to retailers located within the South Worcestershire area, based upon the results of the household survey.
- 1.2.2 As expected, the majority of food shopping trips to destinations outside of the main settlements in South Worcestershire are made from zones that are primarily located outside South Worcestershire. All of the trips made from Zones 2 and 3 (Kidderminster and Bromsgrove), and the vast majority of trips from Zones 1 (West of Stourport-on-Severn), 9 (Bromyard), 12 (Ledbury), and 14 (Tewkesbury) are made to stores outside of South Worcestershire.
- 1.2.3 Of the survey zones principally falling within the South Worcestershire area, Zone 13 (Upton-upon-Severn) has the largest proportion of main food shopping trips which are made to destinations outside of South Worcestershire (46%). 29% of trips from this zone are made to stores in Tewkesbury, 8% to Ledbury, 7% to Cheltenham and 2% to other destinations. 31% of trips from Tenbury Wells (Zone 4) are made outside of South Worcestershire including 16% to Leominster and 7% to Kidderminster.





1.2.4 In terms of the main settlements within South Worcestershire, the following observations can be made:

Worcester

- 1.2.5 Due to its size and the number of foodstores in the City, Worcester not only retains the vast majority (87% - 94%) of the main-food market share from its survey zones (Zones 6-8), but it also draws from other zones across the study area, notably 36% of the market from Zone 5 (Rural North West of South Worcestershire), 25% from Zone 10 (Rural West of South Worcestershire) and 21% from Zone 16 (Persnore). The City also attracts trips from Zones 9 (Bromyard, 8%), 11 (Great Malvern, 8%), 15 (Droitwich, 11%), and to a much lesser extent Zone 12 (Ledbury, 1%).
- 1.2.6 Reflecting a lack of medium/large foodstore facility in the City Centre, the vast majority of main food trips are made to stores elsewhere in the City.
- 1.2.7 The Tesco store at St Peters captures the largest overall portion of the market share in Worcester. 50% of all trips from Zone 8 (Worcester East) are made to the store and 19% made from Zone 6 (Worcester West). From outside Worcester, 7% of all trips from Zones 10 (Rural West of South Worcestershire) and 13 (Upton-upon-Severn) are made to the store, and 6% each from Persnore (Zone 16) and Great Malvern (Zone 11).
- 1.2.8 Other popular stores in Worcester include the Tesco at Warndon (31% of trips made from Zone 7), Sainsbury's at St John's (21% from Zone 6 and 7% from Zone 10) and the Aldi at Tybridge Street (27% of trips from Zone 6).

Evesham

- 1.2.9 Evesham retains 90% of all main food shopping trips from its zone (Zone 17). Of these trips, 12% are made to stores in the Town Centre where Aldi on Swan Street has the largest market share (17%). Outside of the Town Centre, Morrisons on Davies Road is the most popular destination attracting 28% of trips. Tesco on Worcester Road captures 25% of the market share and Lidl on Broadway Road captures 16%. 7% of the main food shopping trips are made over the internet.
- 1.2.10 Foodstores in Evesham also attract shoppers from the surrounding area with a large proportion (47%) of residents from Zone 16 (Persnore) undertaking their main food shop in Evesham. Tesco on Worcester Road is again a popular store, capturing 21% of the market share from Persnore, with the Aldi store at Swan Lane the next popular at 6%. The Waitrose at Merstow Green also attracts 5% of trips from Persnore.



Droitwich

- 1.2.11 Droitwich retains 68% of main food shopping trips from its survey zone (Zone 15) with the majority of trips captured by the Waitrose and Morrison's stores within the Town Centre. The Morrisons store is the most popular destination for shoppers attracting 33% of trips, while 14% of trips are made to Waitrose. Outside of the Town Centre, the Aldi on Kidderminster Road to the north east of Droitwich captures 19% of the market share. Internet food shopping accounts for 13% of the main food shopping market share from Droitwich.
- 1.2.12 In addition, 12% of all main food shopping trips from the adjacent Zone 5 (Rural North West of South Worcestershire) are also made to stores in Droitwich with 8% made to Waitrose on Saltway and 2% each are made to Morrisons and Aldi.
- 1.2.13 The Waitrose on Saltway also draws a small number of trips from Zones 1 (West of Stourport on Severn), 4 (Tenbury Wells) and 9 (Bromyard), whilst the Aldi on Kidderminster Road draws a small number of trips from Zone 2 (Kidderminster) and Zone 10 (Rural west of South Worcestershire).

Malvern

- 1.2.14 Overall, foodstores in Malvern retain 58% and 83% of the market share respectively from the town's survey zones (Zones 10 & 11). They also draw from adjacent zones, notably Zone 13 (Upton-upon-Severn (30%)) and Zone 6 (Worcester West (10%)).
- 1.2.15 The Morrisons store on Roman Way captures the largest share of the market (30% from Zone 10 /37% from Zone 11) while the Waitrose in the Town Centre attracts between 19% and 24% from those in the town. In Malvern link, the Lidl on Worcester Road attracts 7% and 10% of trips from Zones 10 and 11, while the Co-op at Barnards Green attracts 4% of trips from Zone 11. Internet food shopping accounts for 4% of the market share from Zones 10 and 11.
- 1.2.16 Outside the town's survey zones (Zones 10 & 11), Morrisons on Roman Way is again the most popular foodstore. The store attracts 15% of all trips from Zone 13 (Upton-upon-Severn) and 6% of trips from Zone 6 (Worcester West). It also attracts a smaller number of trips from Zones 5 (Rural North West of South Worcestershire), 7-9 (Worcester North and East, and Bromyard), and from Zone 12 (Ledbury). Waitrose captures 2% of the market from Zones 6 and 9 respectively and 10% from Upton-upon-Severn (Zone 13).





Pershore

- 1.2.17 Surprisingly Pershore only retains 21% of the main food shopping market share from its zone (Zone 16). Foodstores in both Evesham and Worcester both have an influence on food shopping patterns in Zone 16, but this may partly reflect the size/extent of the zone and that in parts these centres are located nearer to residents than Pershore.
- 1.2.18 Of Pershore's 21% market share from Zone 16, the Town Centre Asda store on King George's Way captures the majority of trips (16%), while the Co-op on Racecourse Road to the north of the town attracts 4% of market share from the town. 13% of main food shopping trips from Pershore are made over the internet.
- 1.2.19 Convenience goods facilities in Pershore have very limited influence on shopping patterns outside its Zone (Zone 16).

Tenbury Wells

- 1.2.20 Foodstores in Tenbury Wells capture 65% of the market share from the town's survey zone (Zone 4). Tesco on Teme Street attracts 42% of trips while the Nisa on Market Square also functions as a main food shopping destination, capturing 12% of the market share from the town.
- 1.2.21 The Town Centre Tesco store attracts a limited number of trips from surrounding zones including 2% from Zone 1 (West of Stourport on Severn), 3% from Zone 5 (Rural North West of South Worcestershire), and 1% from Zone 11 (Great Malvern).
- 1.2.22 Internet shopping accounts for 11% of the main food shopping market share from Zone 5.

Upton-upon-Severn

- 1.2.23 Upton-upon-Severn lacks a large foodstore and consequently, the town retains (from Zone 13) only 7% of main food shopping trips (4% Co-op on Old Street, 3% to Spar on High Street). These stores do not attract any trips from elsewhere in the study area.
- 1.2.24 Foodstores in Malvern and Tewkesbury are the most popular main food destinations from Zone 13 with 28% of trips made to Tewkesbury, 10% of trips made to stores in Great Malvern Town Centre, and 20% to stores elsewhere in Malvern. Zone 13 is located in-between Tewkesbury and Malvern with the majority of residents less than 14km from one of these destinations. 5% of main food shopping trips are made via the internet.



Top Up Food Shopping

- 1.2.25 **Appendix Dii** summarises the proportion of 'top-up' food shopping trips made at retailers located within the South Worcestershire area, based upon the results of the household survey.
- 1.2.26 From scrutiny of the household survey results, we note that broadly the same proportion of top-up and main-food shopping trips are made at stores within the South Worcestershire area. However, stores in Worcester claim a smaller overall market share in top-up shopping trips whilst stores in Wychavon District, and Malvern Hills District both claim higher overall market shares in top-up shopping trips.

Worcester

- 1.2.27 Worcester retains between 86% and 94% of top-up food shopping from its study zones (Zones 6-8). Compared with main-food shopping, a greater proportion of top-up food trips are made to stores within the City Centre from Zones 6 and 7 (9% and 3% respectively) with Iceland in the Crowngate Shopping Centre the most popular destination. This store also attracts 3% of the top-up food trips from Zone 15 (Droitwich).
- 1.2.28 Outside of the City Centre, the Tesco at St Peters is the most popular destination, claiming 49% of the market share from Zone 8 (Worcester East) and 6% from Zone 7 (Worcester North). The store also attracts 3% of the market share from Zone 10 (Rural West of South Worcestershire), and 8% from Zone 16 (Persore).
- 1.2.29 Sainsbury's at St John's is the most popular destination from the West of Worcester Zone (Zone 6) claiming 28% of the market share and the store also draws a small number of trips from Zones 4 and 5 (Tenbury Wells and Rural North West of South Worcestershire) and Zones 8 and 10 (Worcester East and Rural West of South Worcestershire).
- 1.2.30 The Tesco store at Mill Wood Drive, Warndon claims the highest market share from Zone 7 (25%), with the next most popular stores being the Co-op at Ombersley Road (12%) and then the Sainsbury's Local at Barnourne Road (11%).

Evesham

- 1.2.31 A healthy 93% of top-up food shopping trips are retained in Evesham (from Zone 17). 18% of trips are captured by stores within the Town Centre including at Aldi at Swan Lane (7%), Co-op on the High Street (3%) and 1% to the new Waitrose at Merstow Green.





1.2.32 Stores outside the Town Centre also have an influence on top-up shopping patterns. Morrisons at Davies Road captures 24% of the Market Share, Lidl on Broadway Road captures 12% and Tesco on Worcester Road claims 9%. These stores also claim a small portion of top-up-food market share from Pershore's study zone (Zone 16).

Droitwich

1.2.33 Droitwich retains 86% of the top-up food market share from its zone (Zone 15). As with main-food shopping, Morrisons (34%) and Waitrose (17%) in the town centre attract the most trips, although a greater proportion of top-up food shopping trips (30% vs 23%) are made to stores out of the town centre than main food shopping trips. Of these stores, Tesco Express on Mulberry Tree Hill captures 12% of the market share, followed by Sainsbury's Local at Worcester Road (8%) and Aldi, Kidderminster Road (5%).

1.2.34 Only the Waitrose and the Aldi stores attract any trips from other zones with 3% of trips from Zone 5 (Rural North West of South Worcestershire) made to Waitrose and 3% from Zone 2 (Kidderminster) made to Aldi.

Malvern

1.2.35 48% and 92% of the top-up food market share is retained within the town's survey zones (10 & 11). Within the Town Centre, Waitrose is the most popular destination, attracting 11% of trips from Zone 10, 16% from Zone 11 and a small proportion of trips from Zones 12 and 13 (Ledbury and Upton-upon Severn).

1.2.36 Within Malvern's district centres, Co-op in Barnard's Green attracts 16% of the market share from Zone 11 and 7% from Zone 13 (Upton-upon-Severn). Lidl in Malvern Link captures 14% of the market share in Zone 11 and also attracts trips to a much lesser extent from Zone 10, Zone 12 (Ledbury) and Zone 13 (Upton-upon-Severn).

1.2.37 In terms of the out-of-centre facilities, Morrisons off Roman Way attracts 19% of trips from Zone 11, 17% from Zone 10, and also attracts 8% from Zone 6 (Worcester West) and a smaller number of trips from Zones 7, 13 and 15 (Worcester North, Upton-upon-Severn, and Droitwich). Marks and Spencer at Malvern Retail Park attracts 13% of trips from Zone 10 and 5% from Zone 11. The store also attracts a small proportion of trips from Worcester Zones 6, 7 and 8.





Pershore

- 1.2.38 54% of the market share from Pershore (Zone 16) is retained within the town, 40% in the town centre, and 14% in out-of-centre locations. As with main food shopping trips, the most popular destinations remain Asda at King George's Way (31%) and Co-op on Racecourse Road (13% of trips).
- 1.2.39 Convenience facilities in Pershore have very little influence on top-up food shopping patterns outside its Zone (Zone 16).

Tenbury Wells

- 1.2.40 Tenbury Wells Town Centre retains 84% of top-up shopping market share from its zone (Zone 4). Of the town centre shops, Tesco attracts 40% of trips from those in the town, Nisa on Market Square captures 16% of the market share, while other local shops combined capture 28% of the market.
- 1.2.41 The town also attracts 1% of trips each from Zone 1 (West of Stourport on Severn) and Zone 11 (Great Malvern) and 3% from Zone 5 (Rural North West of South Worcestershire).

Upton-upon-Severn

- 1.2.42 Upton-upon-Severn retains 32% of the top-up shopping from its zone (Zone 13), a much greater proportion than main-food shopping. 27% of trips are made to Co-op on Old Street and 5% are made to the Spar on High Street.
- 1.2.43 Other top-up shopping destinations from those in Zone 13 include Tewkesbury (17% of trips), Ledbury (8%) and stores in out-of-centre locations in Malvern (8%).

1.3 Comparison Goods Shopping Patterns

Worcester

- 1.3.1 Retail facilities in Worcester attract comparison shopping trips from across the study area except for Zone 14 (Tewkesbury) from which no trips are made to the city. A catchment plan illustrating Worcester's comparison goods catchment is provided at **Appendix Diii**.
- 1.3.2 Overall, Worcester captures approximately a quarter of the comparison goods market share from the Study Zone with 12% of the market captured by stores in Worcester City Centre, 10% by those in out-of-centre locations, and 1% by those in District and Local Centres.





- 1.3.3 From Worcester's study zones (Zones 6-8), as illustrated at **Appendix Div**, the City retains an average of 64% of the market share, 31% is captured by facilities in the City Centre and 33% by those in other locations within the city. 4% of trips from Worcester are made to facilities in Malvern, and 1% are made to those in Droitwich. Centres outside of South Worcestershire have a similar marginal influence on the shopping patterns within Worcester's survey zones with Kidderminster, Cheltenham and Birmingham each attracting 1% of trips made. Just under a quarter (23%) of the comparison shopping market share is captured by online retailers.
- 1.3.4 Aside from its own study zones, Worcester has the biggest influence on Zone 5 (Rural North West of South Worcestershire), from where 40% of the comparison goods shopping trips are made (23% to the City Centre, 18% elsewhere). Worcester captures between 21% and 23% of the market share from Malvern (Zones 10 & 11), 13% from Upton-upon-Severn (Zone 13), and 28% & 24% respectively from Droitwich and Pershore (Zones 15 & 16). Only 6% of the market from Evesham (Zone 17) is captured, and between 2% & 5% from Zones 2-4 (West of Stourport-on-Severn, Kidderminster and Bromsgrove) and from Zone 12 (Ledbury).
- 1.3.5 Across all study zones that Worcester has an influence on, a greater number of trips are made to City Centre retailers than those in out of centre locations.

Evesham

- 1.3.6 Within Evesham, as shown in **Appendix Dv**, retail facilities retain (from Zone 17) 50% of the comparison-goods shopping trips. 30% of the market share is captured by the City Centre and 20% by out-of-centre destinations (7% Evesham Shopping Park, 9% Four Pools Retail Park, 1% The Valley, 3% to other facilities). Of the remaining trips, 15% are made to Cheltenham, 6% to Worcester, 2% to Redditch and 4% to Stratford-on-Avon. 17% of the market share is captured by internet shopping.
- 1.3.7 Across the study area, the only other zone influenced by facilities in Evesham is Zone 16 (Pershore). Evesham Town Centre captures 4% of the market share from here and out of town facilities capture 14% of trips (4% to Evesham Retail Park, 7% to Four Pools Retail Park, 2% to The Valley).

Droitwich

- 1.3.8 Retail facilities in Droitwich Town Centre retain 29% of the market share and out-of-centre facilities retain 5% from its zone (Zone 15) (see **Appendix Dvi**). The Town Centre attracts 1% of trips each from Zone 5 (Rural North West of Worcestershire), Zone 7 (Worcester North) and Zone



8 (Worcester East) while out-of-centre facilities in Droitwich attract 1% of trips from Zone 3 (Bromsgrove), Zone 4 (Tenbury Wells) and Zones 5 and 6.

- 1.3.9 Comparison goods trips from Droitwich are made to Worcester (28%), Kidderminster (2%), Bromsgrove (3%) and Redditch (3%). Internet shopping captures 25% of the market share.

Malvern

- 1.3.10 Facilities in Great Malvern Town Centre retain 7% and 21% of the market share respectively from Malvern's study zones (Zones 10 & 11). Out of centre destinations retain 11% and 18%, while Barnards Green and Malvern Link District Centres together retain 5% and 7% of the market share (see **Appendix Dvii**).

- 1.3.11 Facilities within Malvern attract a small proportion of trips from surrounding survey zones with facilities in out-of-centre locations attracting more visits than those in the Town Centre. Malvern Shopping park is the most popular destination of these, attracting 4% of trips from Zone 6 (Worcester West) and 5% of trips each from Zones 12 and 13 (Ledbury and Upton-upon-Severn).

- 1.3.12 In terms of trips made from Malvern (Zones 10 & 11), 23% are made to Worcester, 4% to Hereford, 2% to Ledbury and 2% to Cheltenham. 26% of the market is captured by online retailers.

Pershore

- 1.3.13 13% of comparison goods trips from Zone 16 (Pershore) are retained in Pershore Town Centre. The remaining trips from the zone are made to Worcester (24% of the market share), 19% go to Evesham, 8% to Cheltenham and 2% to Birmingham. 26% of the comparison goods market from Malvern is captured by online retailers. The retention rates are illustrated at **Appendix Dviii**.
- 1.3.14 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

- 1.3.15 Shops in Tenbury Wells Town Centre retain 26% of the comparison goods market share from its survey zone (Zone 4) (see **Appendix Dix**). A limited number of trips to the Town Centre are made from adjoining survey zones with 1% of the market share captured each from Zone 5 (Rural North West of South Worcestershire) and Zone 9 (Bromyard).



1.3.16 Facilities in Kidderminster have the largest influence on comparison shopping in Tenbury Wells, attracting 18% of trips. Facilities in Hereford attract 11%, Worcester and Leominster both attract 5% and Ludlow attracts 2%. Online shopping accounts for 25% of the market share.

Upton-upon-Severn

1.3.17 Given the small size of Upton-upon-Severn and the limited range of comparison goods retailers in the town (see **Appendix Dx**). Only 5% of the market share is retained (from Zone 13) and responses indicate that no trips are made to the town from any other survey zone.

1.3.18 Facilities in Malvern attract 22% of the market share from Upton (9% to out-of-centre destinations, 5% to Great Malvern Town Centre, and 8% to Malvern Link District Centre). Cheltenham attracts 20%, Worcester claims 13% of trips, Tewkesbury 7% and Ledbury 2%. 19% of the comparison goods market share is claimed by internet retailers.

1.4 Internet

1.4.1 The NEMS survey results identify that, for certain comparison goods, residents in the study area are proficient at shopping online. The goods most commonly bought online are books, CDs and DVDs (between 31% and 63% of the market share), small electrical goods (14-45%), large household electrical items (15-52%) and toys, games, bicycles & other sporting or recreational goods (18-51%). As expected, Chemist goods and DIY items are the least common comparison goods to be purchased online, at 0-10% and 1-10% respectively.

1.4.2 For convenience goods, the level of online main food shopping varies between 1% and 13%.

Figure 1.1 Internet Shopping Market Share

	Zones																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Main Food Shopping	8	4	7	5	11	3	1	2	7	4	4	1	5	4	13	13	7
Clothing and Footwear	30	26	32	29	31	17	21	27	39	30	27	17	33	19	24	33	25
Books, CDs & DVDs	56	46	63	56	59	44	49	49	52	60	46	31	38	36	54	62	37
Furnishings & Textiles	25	23	20	18	21	18	13	13	21	28	22	9	10	9	15	15	13
Small Household Goods	7	18	25	15	17	12	7	9	11	29	16	25	17	15	10	20	13
Clocks, Jewellery & Watches	15	28	30	23	24	26	23	28	32	29	22	4	14	20	22	22	18
Toys, Games, Bicycles & Others	31	18	34	44	49	41	48	31	32	44	32	51	26	18	45	45	38
Chemist Goods	6	2	5	4	5	3	4	6	10	3	1	8	1	2	-	1	1
Large Household Electrical Items	24	26	49	22	33	26	30	38	33	52	36	15	30	27	50	41	21
Small Electrical Goods	26	29	38	36	42	45	33	38	35	41	27	14	20	25	30	31	18
Furniture, Carpets, Flr Coverings	6	18	17	22	17	15	11	18	9	17	11	6	10	6	25	10	6
DIY & Gardening Goods	8	2	8	7	7	3	10	6	6	5	1	4	10	4	5	9	1

Source: Derived from NEMS Household Survey Results (January 2019)



1.4.3 In terms of how items purchased online are received, Figure 1.2 sets out the proportion that were via home delivery and those by click and collect.

Figure 1.2: Online Purchases Delivery Method

Goods Category	Online Delivery Method (%)		
	Home Delivery	Click and Collect	Downloaded
Main Food	100	0	N/A
Clothing & Footwear	91	8	N/A
Books, CDs & DVDs	96	2	2
Furnishings & Household Textile Goods	96	4	N/A
Small Household Goods	96	4	N/A
Clocks, Jewellery, Watches	99	1	N/A
Toys, Games, Bicycles & others	98	2	N/A
Chemist Goods	99	1	N/A
Large Household Electricals	96	4	N/A
Small Electrical Goods	91	8	N/A
Furniture, Carpets & Floor Coverings	99	1	N/A
DIY incl. Gardening Goods	98	2	N/A

Source: Derived from NEMS Household Survey Results

Note: Figures may not add due to rounding

1.4.4 In summary, the results show that:

- for online convenience goods shopping, all were received via home delivery;
- over 91% of all comparison goods categories were home delivered;
- purchases of clothing & footwear, and small electrical goods were the most commonly collected from store (8%); and
- roughly 2% of purchases for books, CDs and DVDs were downloaded rather than delivered or collected from store.





Appendices



Appendix Di: Main Food Shopping Patterns

	Zones																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Worcester City					36	87	97	94	8	25	8	1	13		11	21	
City Centre					1	1	4	1		1					2		
Other					36	87	93	93	8	24	8	1	13		9	21	
Wychavon District	2	0		1	12	0	0	0	1	1			1	7	67	62	90
Evesham Town Centre														1		12	18
Evesham Other								0						3		30	72
Droitwich Town Centre	1			1	10	0	0		1						48		
Droitwich Other	1	0			2					1					20		
Pershore Town Centre													1	2		17	0
Pershore Other																4	
Other in Wychavon District																0	
Malvern Hills District	2			65	7	10	2	2	5	58	84	5	37			1	
Great Malvern Town Centre						2		0	2	19	28	1	10			0	
Barnards Green						0					4		0				
Malvern Link					0					7	11	1	3				
Other Malvern					2	8	2	1	2	32	40	4	17			0	
Tenbury Wells Town Centre	2			64	3				1		1						
Tenbury Other				1	0												
Upton-upon-Severn Town Centre													7				
Other in Malvern Hills District					2												
South Worcestershire	4	0		66	55	97	99	96	14	84	92	6	51	7	78	84	90
Outside South Worcestershire	88	96	93	29	34			2	79	12	4	93	44	89	9	4	3
Kidderminster	45	71		6	8												
Bromsgrove	0		80					2							7		
Stourport-on-Severn	7	22		2	20												
Tewkesbury				1									28	67	1	1	
Ledbury	3								3	3	2	84	7				
Bromyard				1	3				34	3							
Cheltenham											1		6	20		0	0
Redditch			6												1	2	
Hereford	0			2	0				21	4	1	5					
Leominster				15					21	1	1	0					
Ludlow	26			2	1												
Stourbridge	1	2		1	2										0		
Longbridge/Rubery			6														
Other	6	1	1						0			3	2	2		0	3
Internet	8	4	7	5	11	3	1	2	7	4	4	1	5	4	13	13	7

Source: NEMS household Survey

Note: Figures may not add up to 100% due to rounding



Appendix Dii –Top-up Food Shopping Patterns

	Zones																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Worcester City	2	1		1	21	86	93	94		9		3	1		7	15	
City Centre					2	9	3	5							3	1	
Other	2	1		1	20	77	90	89		9		3	1		4	14	
Wychavon District		3			3			1						1	86	81	99
Evesham Town Centre																2	18
Evesham Other																12	75
Droitwich Town Centre					3										56		1
Droitwich Other		3													30		
Pershore Town Centre														1		40	
Pershore Other																14	
Other in Wychavon District								1								12	6
Malvern Hills District	5			89	48	14	2	3		60	98	3	58		1	1	
Great Malvern Town Centre					1					11	18	1	4				
Barnards Green											17		7				
Malvern Link						1				2	20	2	1				
Other Malvern						11	2	1		35	37		8		1		
Tenbury Wells Town Centre	1			84	3						1						
Tenbury Other				6						1							
Upton-upon-Severn Town Centre													32			1	
Other in Malvern Hills District	4				44	2		2		11	5	1	7				
South Worcestershire	6	4		90	73	100	95	97		69	98	7	59	1	95	96	99
Outside South Worcestershire	93	96	10	10	28		5	2	99	27	1	92	41	99	5	4	
Kidderminster	15	65															
Bromsgrove			86		2		1								4		
Stourport-on-Severn	6	23			15										1		
Tewkesbury													17	88			
Ledbury	1								2	6	1	87	8				
Bromyard				6	8				90	10							
Cheltenham													9	4			
Redditch			2													3	
Hereford									6			3					
Leominster				3					1								
Ludlow	1																
Stourbridge		1													1		
Longbridge/Rubery			5														
Other	70	7	7	1	3		4	2		11		3	7	7		1	
Internet	1							1	1	4	1	2					1

Source: NEMS household Survey

Note: Figures may not add up to 100% due to rounding



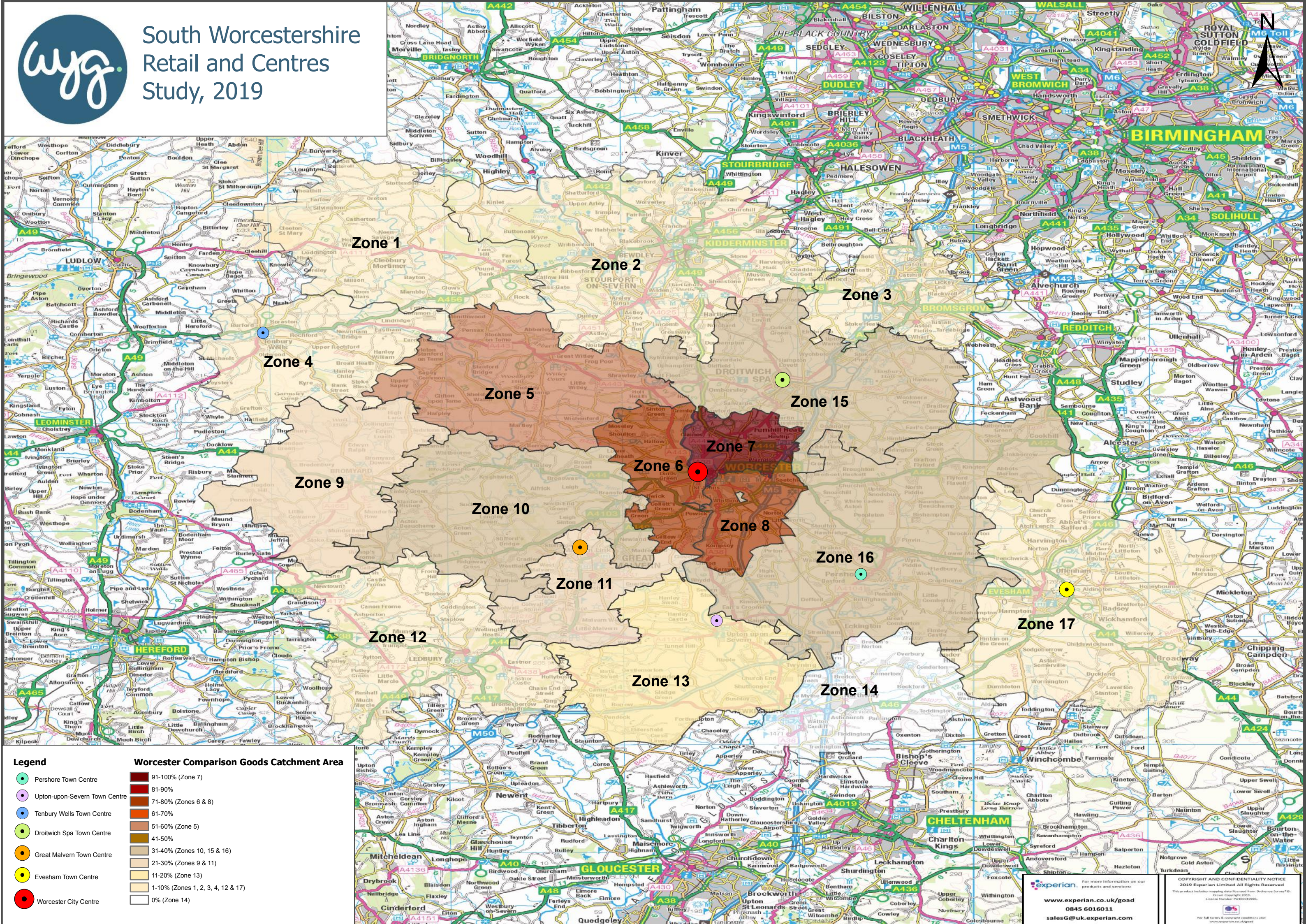


Appendix Diii – Worcester's Comparison Goods Shopping Catchment Plan





South Worcestershire Retail and Centres Study, 2019

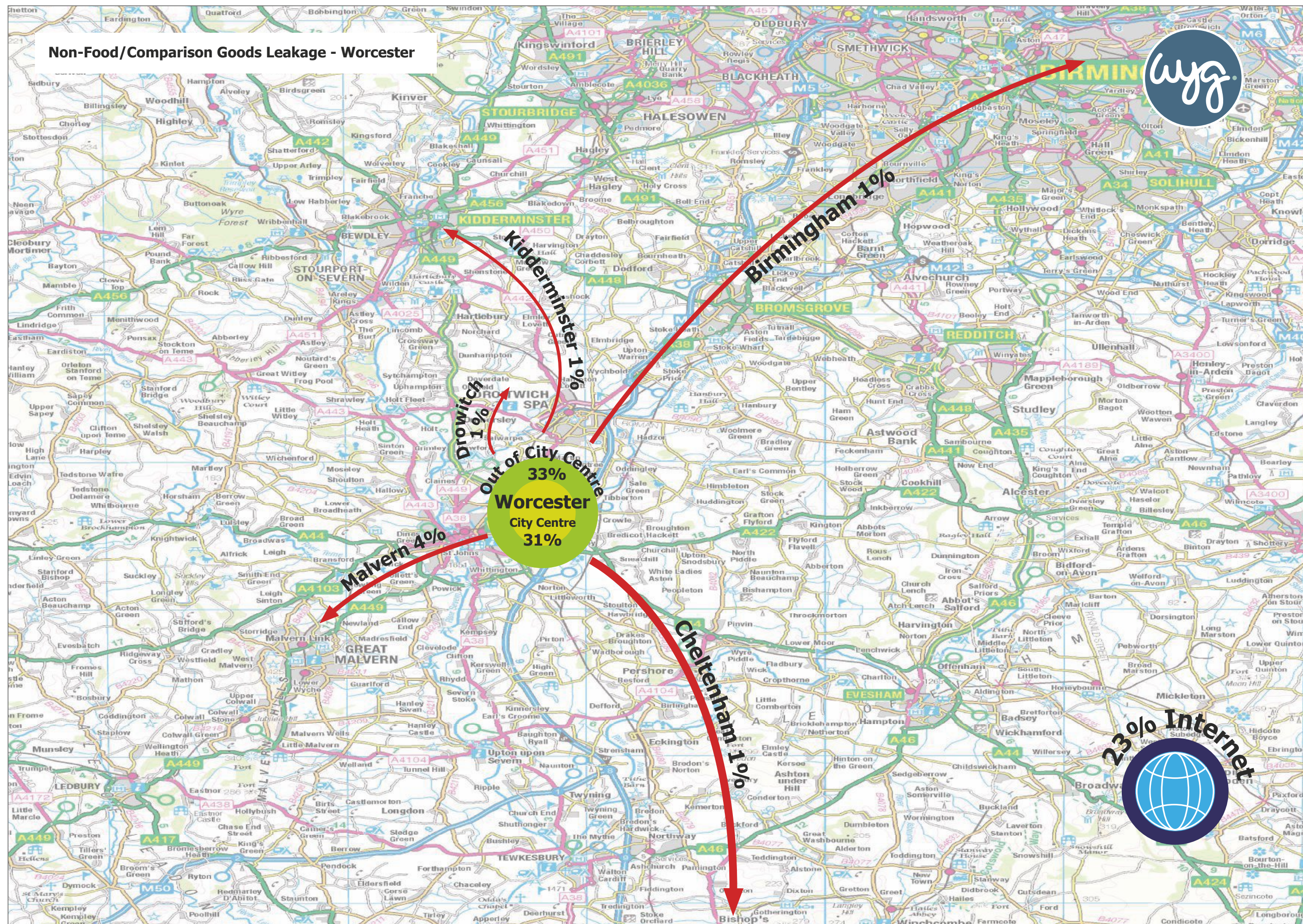




Appendix Div – Worcester Comparison Goods Leakage Plan



Non-Food/Comparison Goods Leakage - Worcester

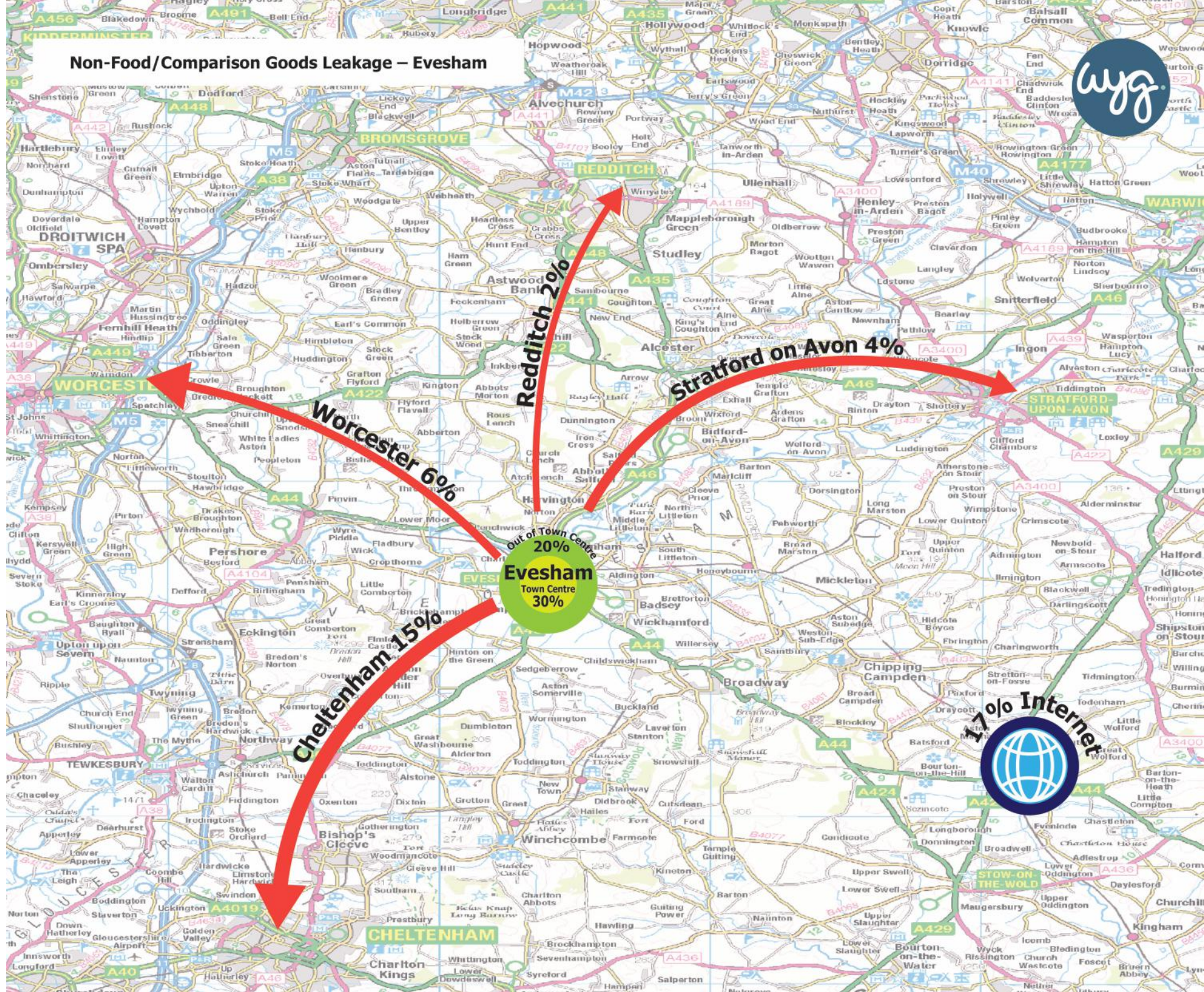




Appendix Dv – Evesham Comparison Goods Leakage Plan



Non-Food/Comparison Goods Leakage – Evesham

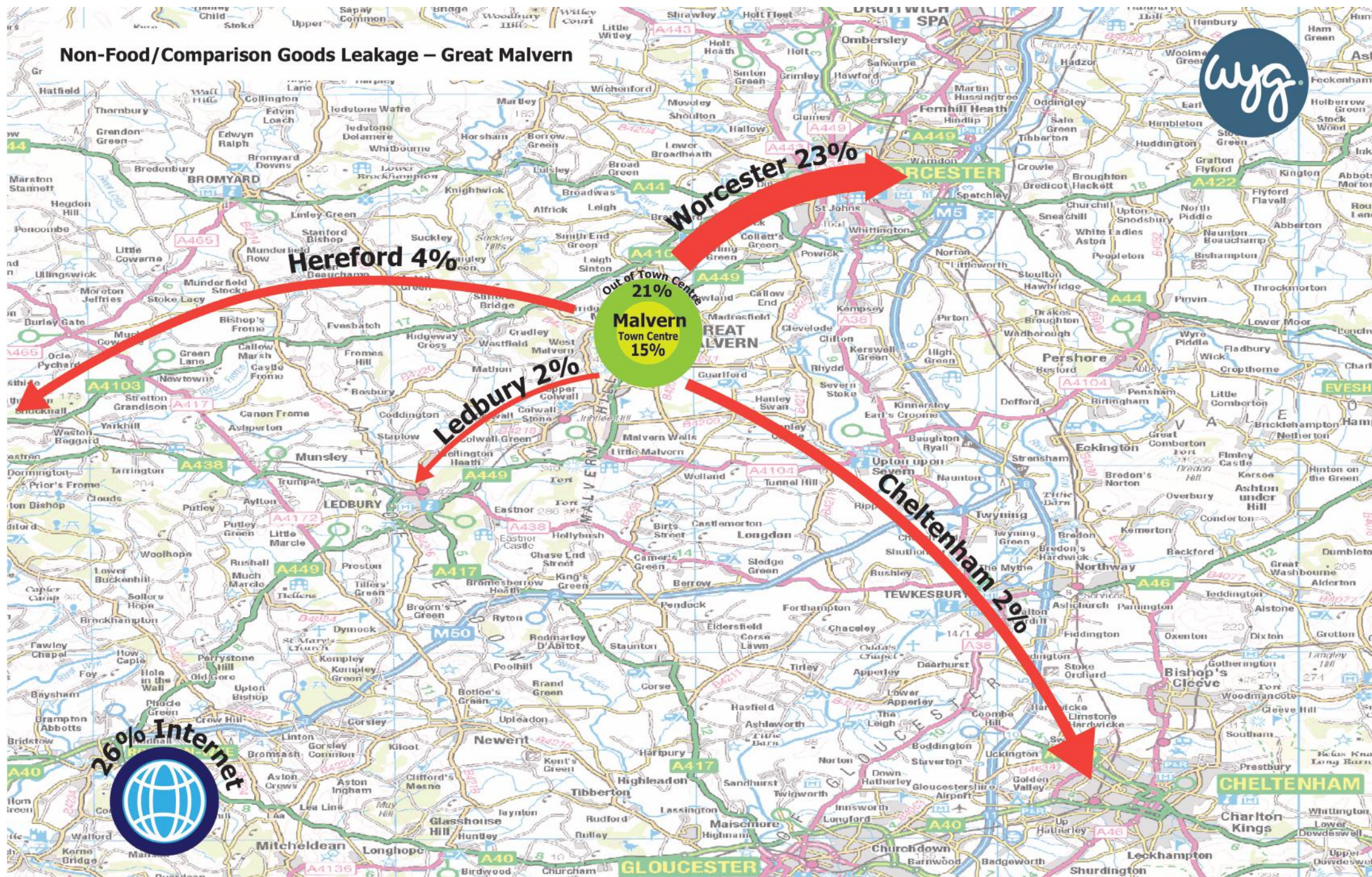




Appendix Dvi – Droitwich Comparison Goods Leakage Plan



Non-Food/Comparison Goods Leakage – Great Malvern

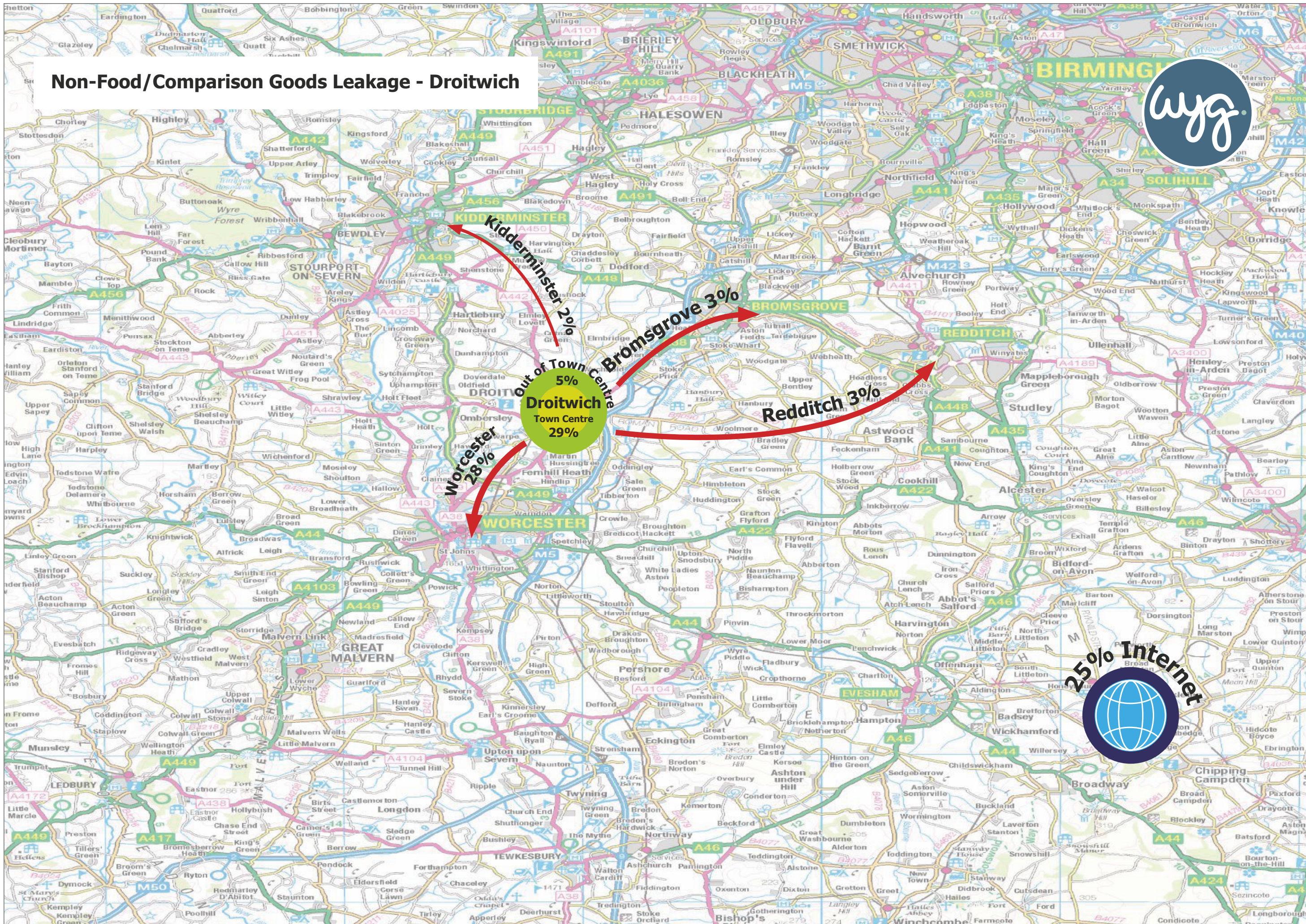




Appendix Dvii – Malvern Comparison Goods Leakage Plan



Non-Food/Comparison Goods Leakage - Droitwich

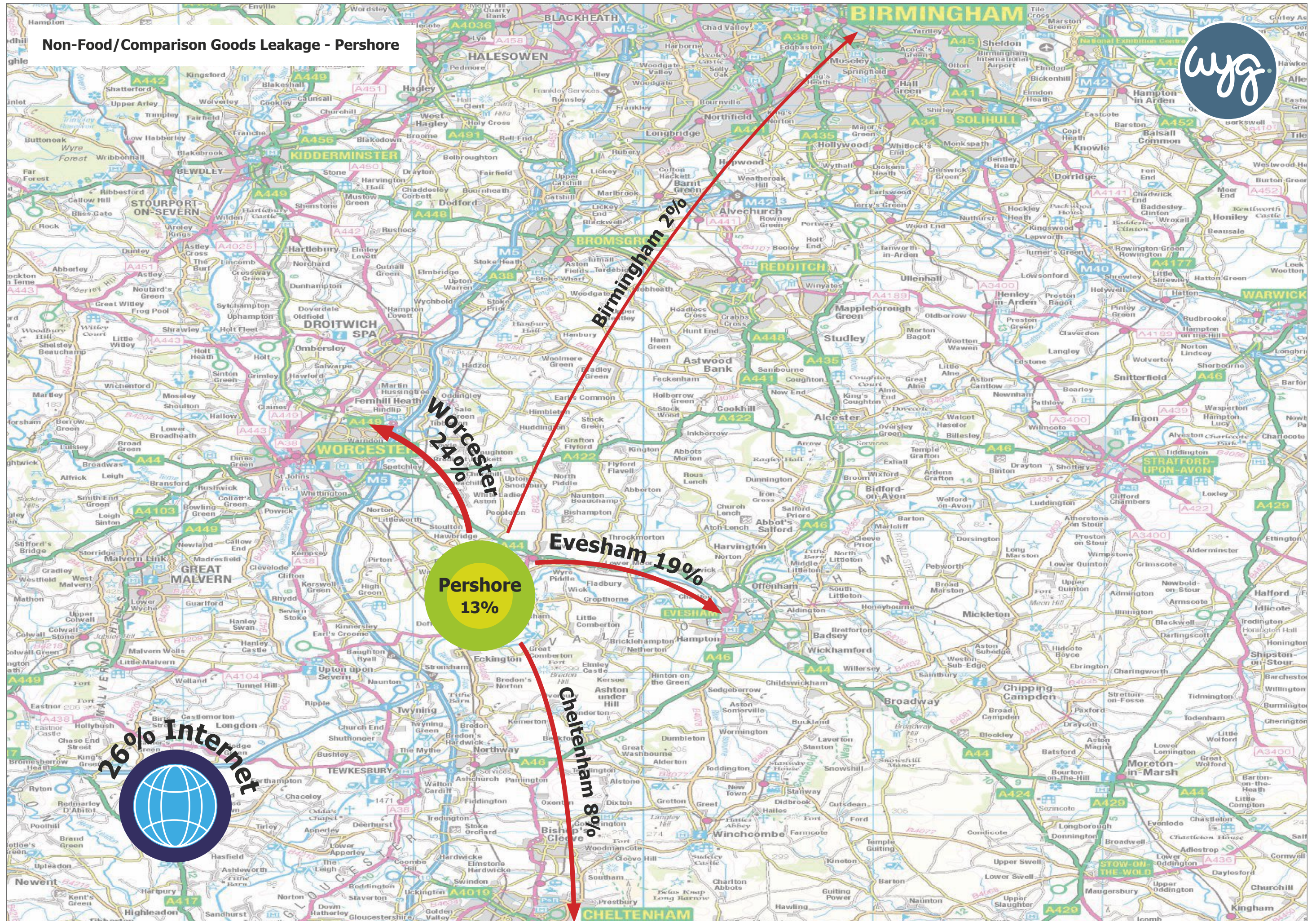




Appendix Dviii – Pershore Comparison Goods Leakage Plan



Non-Food/Comparison Goods Leakage - Pershore

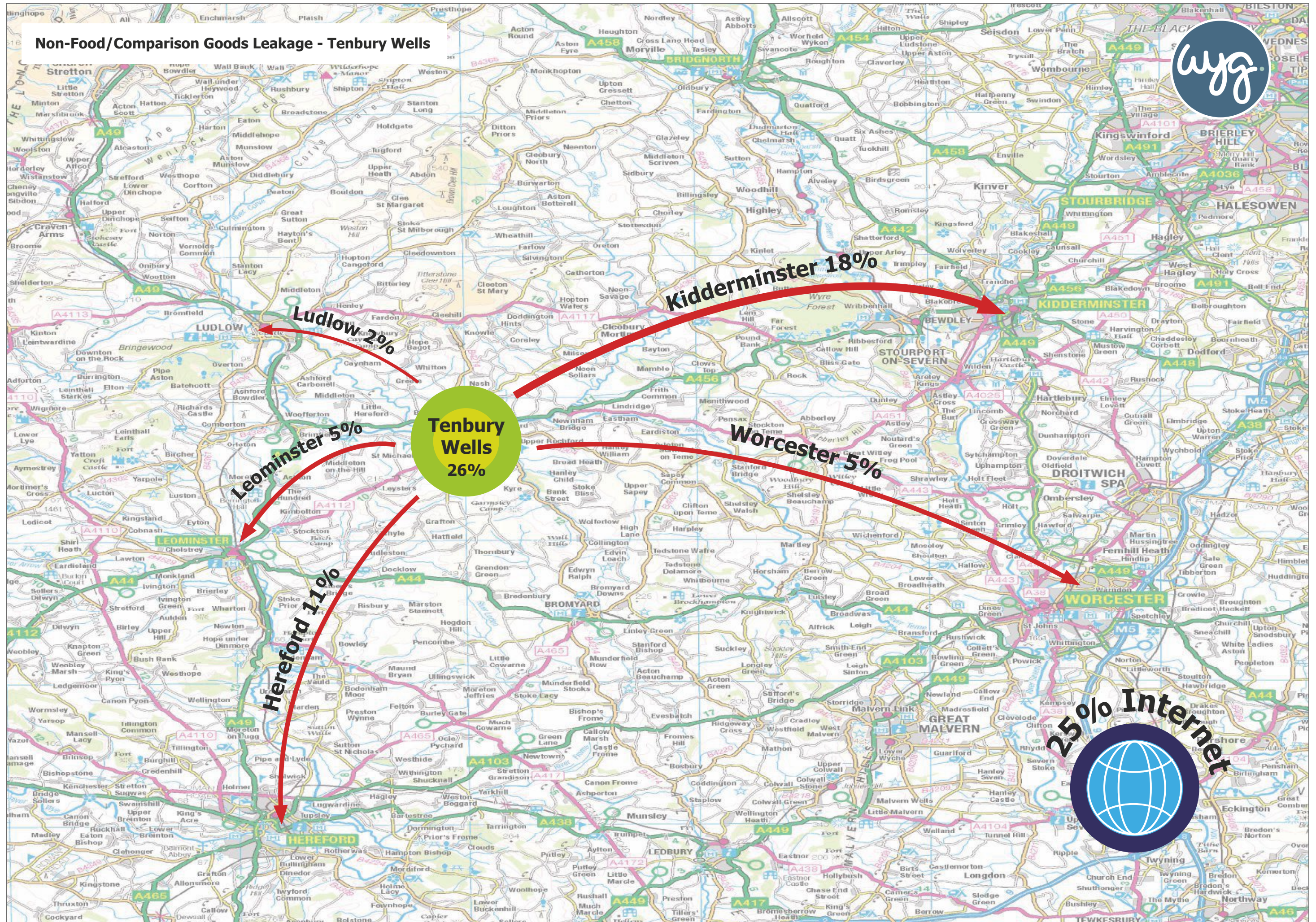




Appendix Dix – Tenbury Comparison Goods Leakage Plan



Non-Food/Comparison Goods Leakage - Tenbury Wells

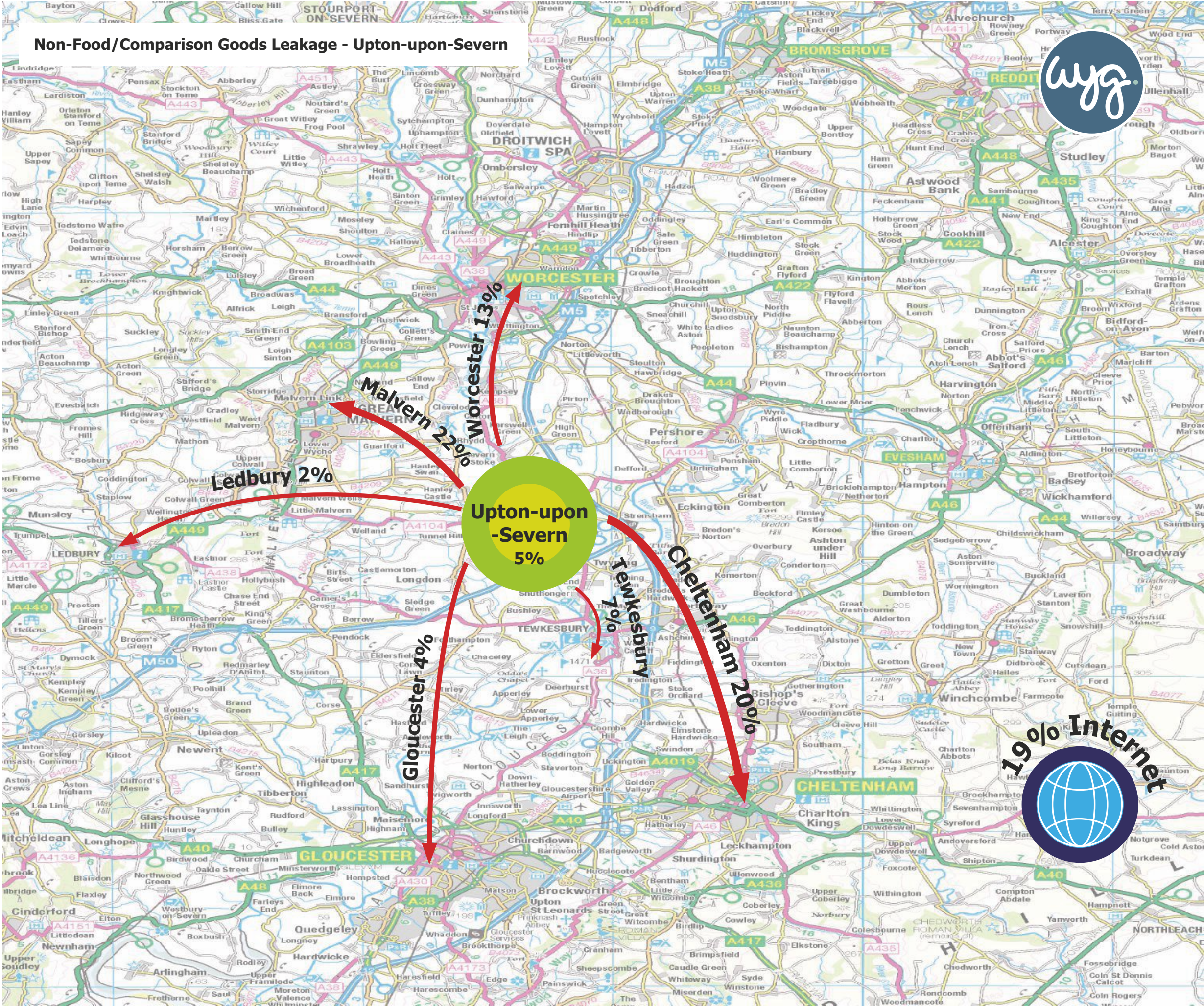




Appendix Dx – Upton upon Severn Comparison Goods Leakage Plan



Non-Food/Comparison Goods Leakage - Upton-upon-Severn



Appendix E

Experian Mosaic Summary

Mosaic UK

Classifications

A City Prosperity	A01	World-Class Wealth	Global high flyers and families of privilege living luxurious lifestyles in London's most exclusive boroughs
	A02	Uptown Elite	High status households owning elegant homes in accessible inner suburbs where they enjoy city life in comfort
	A03	Penthouse Chic	City suits renting premium-priced flats in prestige central locations where they work hard and play hard
	A04	Metro High-Flyers	Ambitious 20 and 30-somethings renting expensive apartments in highly commutable areas of major cities
B Prestige Positions	B05	Premium Fortunes	Influential families with substantial income established in distinctive, expansive homes in wealthy enclaves
	B06	Diamond Days	Retired residents in sizeable homes whose finances are secured by significant assets and generous pensions
	B07	Alpha Families	High-achieving families living fast-track lives, advancing careers, finances and their school-age kids' development
	B08	Bank of Mum and Dad	Well-off families in upmarket suburban homes where grown-up children benefit from continued financial support
	B09	Empty-Nest Adventure	Mature couples in comfortable detached houses who have the means to enjoy their empty-nest status
C Country Living	C10	Wealthy Landowners	Prosperous owners of country houses including the rural upper class, successful farmers and second-home owners
	C11	Rural Vogue	Country-loving families pursuing a rural idyll in comfortable village homes while commuting some distance to work
	C12	Scattered Homesteads	Older households appreciating rural calm in stand-alone houses within agricultural landscapes
	C13	Village Retirement	Retirees enjoying pleasant village locations with amenities to service their social and practical needs
D Rural Reality	D14	Satellite Settlers	Mature households living in expanding developments around larger villages with good transport links
	D15	Local focus	Rural families in affordable village homes who are reliant on the local economy for jobs
	D16	Outlying Seniors	Pensioners living in inexpensive housing in out of the way locations
	D17	Far-Flung Outposts	Inter-dependent households living in the most remote communities with long travel times to larger towns

E Senior Security	E18	Legacy Elders	Time-honoured elders now mostly living alone in comfortable suburban homes on final salary pensions
	E19	Bungalow Haven	Peace-seeking seniors appreciating the calm of bungalow estates designed for the elderly
	E20	Classic Grandparents	Lifelong couples in standard suburban homes enjoying retirement through grandchildren and gardening
	E21	Solo Retirees	Senior singles whose reduced incomes are satisfactory in their affordable but pleasant owned homes
F Suburban Stability	F22	Boomerang Boarders	Long-term couples with mid-range incomes whose adult children have returned to the shelter of the family home
	F23	Family Ties	Active families with teens and adult children whose prolonged support is eating up household resources
	F24	Fledgling Free	Pre-retirement couples with respectable incomes enjoying greater space and spare cash since children left home
	F25	Dependable Me	Single mature owners settled in traditional suburban semis working in intermediate occupations
G Domestic Success	G26	Cafés and Catchments	Affluent families with growing children living in upmarket housing in city environs
	G27	Thriving Independence	Well-qualified older singles with incomes from successful professional careers in good quality housing
	G28	Modern Parents	Busy couples in modern detached homes juggling the demands of school-age children and careers
	G29	Mid-Career Convention	Professional families with children in traditional mid-range suburbs where neighbours are often older
H Aspiring Homemakers	H30	Primary Ambitions	Forward-thinking younger families who sought affordable homes in good suburbs which they may now be out-growing
	H31	Affordable Fringe	Settled families with children owning modest, 3-bed semis in areas where there's more house for less money
	H32	First-Rung Futures	Pre-family newcomers who have bought value homes with space to grow in affordable but pleasant areas
	H33	Contemporary Starts	Fashion-conscious young singles and partners setting up home in developments attractive to their peers
	H34	New Foundations	Occupants of brand new homes who are often younger singles or couples with children
	H35	Flying Solo	Bright young singles on starter salaries choosing to rent homes in family suburbs

Mosaic UK

Classifications

I Family Basics	I36	Solid Economy	Stable families with children renting better quality homes from social landlords
	I37	Budget Generations	Families supporting both adult and younger children where expenditure can exceed income
	I38	Childcare Squeeze	Younger families with children who own a budget home and are striving to cover all expenses
	I39	Families with Needs	Families with many children living in areas of high deprivation and who need support
J Transient Renters	J40	Make Do & Move On	Yet to settle younger singles and couples making interim homes in low cost properties
	J41	Disconnected Youth	Young people endeavouring to gain employment footholds while renting cheap flats and terraces
	J42	Midlife Stopgap	Maturing singles in employment who are renting short-term affordable homes
	J43	Renting a Room	Transient renters of low cost accommodation often within subdivided older properties
K Municipal Challenge	K44	Inner City Stalwarts	Long-term renters of inner city social flats who have witnessed many changes
	K45	Crowded Kaleidoscope	Multi-cultural households with children renting social flats in over-crowded conditions
	K46	High Rise Residents	Renters of social flats in high rise blocks where levels of need are significant
	K47	Streetwise Singles	Hard-pressed singles in low cost social flats searching for opportunities
	K48	Low Income Workers	Older social renters settled in low value homes in communities where employment is harder to find
L Vintage Value	L49	Dependent Greys	Ageing social renters with high levels of need in centrally located developments of small units
	L50	Pocket Pensions	Penny-wise elderly singles renting in developments of compact social homes
	L51	Aided Elderly	Supported elders in specialised accommodation including retirement homes and complexes of small homes
	L52	Estate Veterans	Longstanding elderly renters of social homes who have seen neighbours change to a mix of owners and renters
	L53	Seasoned Survivors	Deep-rooted single elderly owners of low value properties whose modest home equity provides some security

M Modest Traditions	M54	Down-to-Earth Owners	Ageing couples who have owned their inexpensive home for many years while working in routine jobs
	M55	Offspring Overspill	Lower income owners whose adult children are still striving to gain independence meaning space is limited
	M56	Self Supporters	Hard-working mature singles who own budget terraces manageable within their modest wage
N Urban Cohesion	N57	Community Elders	Established older households owning city homes in diverse neighbourhoods
	N58	Cultural Comfort	Thriving families with good incomes in multi-cultural urban communities
	N59	Asian Heritage	Large extended families in neighbourhoods with a strong South Asian tradition
	N60	Ageing Access	Older residents owning small inner suburban properties with good access to amenities
O Rental Hubs	O61	Career Builders	Motivated singles and couples in their 20s and 30s progressing in their field of work from commutable properties
	O62	Central Pulse	Entertainment-seeking youngsters renting city centre flats in vibrant locations close to jobs and night life
	O63	Flexible Workforce	Self-starting young renters ready to move to follow worthwhile incomes from service sector jobs
	O64	Bus-Route Renters	Singles renting affordable private flats away from central amenities and often on main roads
	O65	Learners & Earners	Inhabitants of the university fringe where students and older residents mix in cosmopolitan locations
	O66	Student Scene	Students living in high density accommodation close to universities and educational centres