
Appendix F

Vitality and Viability Health Check Assessments

Worcester City Centre Health Check Appraisal

Worcester is the largest centre in South Worcestershire and is the principal retail, commercial and administrative centre of Worcestershire. The city is very well connected by rail and road to other nearby major settlements including Bromsgrove (22km driving distance), Kidderminster (24km), Cheltenham (39km), and Birmingham (48km).

The City Centre, as designated on the South Worcestershire Development Plan (SWDP) Policies Map forms an area bordered by the A44 Deansway to the south and west, The Butts/Shaw Street and Sansome Street to the north, and the A38 City Walls Road to the east. This area contains the Crowngate Shopping Centre, the newly refurbished Cathedral Square leisure development and a large multi-plex Vue Cinema on Friar Street. The Primary Shopping Frontages are along High Street, Broad Street, Pump Street, The Shambles and Bank Street where key national multiple retailers are located. Friar Street and New Street form the 'independent quarter' of the City Centre and the secondary shopping frontages extend along here, and along the western end of Broad Street.



Source: South Worcestershire Development Plan (2016)

Crowngate Shopping Centre is located in the north western part of the City Centre and is divided into two parts, Chapel Walk, accessed from High Street and Broad Street, and Friary Walk accessed off Angel Place. Chapel Walk houses several high-profile retailers including House of Fraser and Debenhams and a number of restaurants within a 'food quarter'. Friary Walk incorporates a car park and is located above Worcester Bus Station. The entrance of Friary Walk from Angel Place is currently undergoing a £1.5 million modernisation programme and is due for completion in Autumn 2019.

The leisure-led Cathedral Square development is another recent investment into the City Centre. Opened in 2017, the £20m scheme replaced the Cathedral Plaza shopping precinct. The development incorporates over 20,000 sqm of retail, leisure and hotel floorspace and provides restaurant units, a gym, bars, a hotel and retail uses set around a public square.

Other smaller shopping locations within the City Centre include Reindeer Court and the Hopmarket. Reindeer Court is a Grade II shopping arcade off The Shambles providing 31 units mainly occupied by local, or independent operators, while the Hopmarket provides several small units in a small retail courtyard located off The Foregate.

A draft City Centre Masterplan has been published by Worcester City Council and although it is not yet formally adopted, it is understood that it will inform the ongoing review of the South Worcestershire Development Plan (SWDP). The document sets out the vision for enhancing the City Centre and identifies opportunities for the enhancement of the public realm, improving connectivity and encouraging a mixture of uses across the City Centre.

Photographs of Worcester City Centre



Photograph 1: Friar Street looking north



Photograph 2: Mealcheapen Street looking west



Photograph 3: High Street looking north



Photograph 4: Bell Square

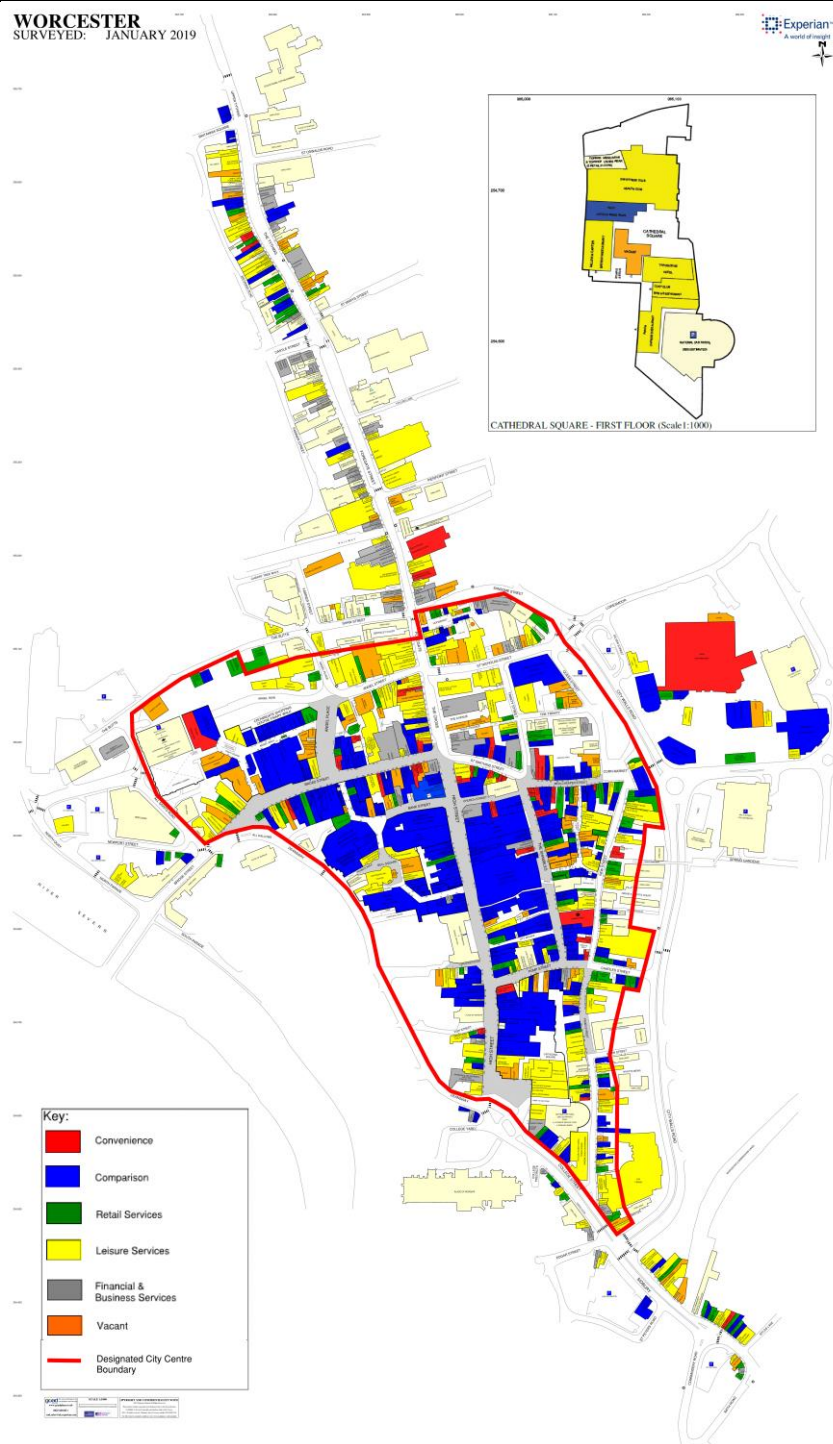


Photograph 5: City Arcade



Photograph 6: New Street

Diversity of Main City Centre Uses



Diversity of Main City Centre Uses

Figure 1: Number of Units in Worcester (2014)

Category	Experian Survey Area		Designated City Centre		UK Av. %
	No.	%	No.	%	
Convenience	34	5	30	6	8
Comparison	273	38	239	45	33
Retail Service	88	12	66	12	14
Leisure Services	131	18	93	17	22
Financial and Business Services	79	11	27	5	11
Vacant	108	15	79	15	11
Total	713	100	534	100	100

Source: Experian

Figure 3: Number of Units in Worcester (2019)

Category	Experian Survey Area		Designated City Centre		UK Av. %
	No.	%	No.	%	
Convenience	38	5	32	6	9
Comparison	229	33	196	38	30
Retail Service	103	15	75	15	15
Leisure Services	167	24	115	22	24
Financial and Business Services	68	10	26	5	10
Vacant	88	13	69	13	11
Total	693	100	513	100	100

Source: Experian

Figure 2: Floorspace in Worcester (2014)

Category	Experian Survey Area		Designated City Centre		UK Av. %
	Sq.m	%	Sq.m	%	
Convenience	11,520	8	4,400	4	15
Comparison	53,850	39	47,260	48	36
Retail Service	8,760	6	6,020	6	7
Leisure Services	33,990	25	23,440	24	23
Financial and Business Services	12,650	9	6,060	6	8
Vacant	16,750	12	11,430	12	10
Total	137,520	100	98,610	100	100

Source: Experian

Figure 4: Floorspace in Worcester (2019)

Category	Experian Survey Area		Designated City Centre		UK Av. %
	Sq.m	%	Sq.m	%	
Convenience	11,480	8	4,030	4	15
Comparison	51,510	36	43,820	42	35
Retail Service	10,190	7	7,270	7	7
Leisure Services	45,200	32	32,220	31	25
Financial and Business Services	11,210	8	5,720	6	8
Vacant	12,870	9	10,070	10	10
Total	142,460	100	103,130	100	100

Source: Experian

Diversity of Main City Centre Uses

We have undertaken our appraisal of Worcester City Centre using Experian Goad surveys as the basis for our statistical analysis. However, in this instance, given that the Goad survey includes some tertiary areas (including units to the north of the railway line and Asda/B&M, Silver Street) we also provide a breakdown of the composition of units/floorspace within the adopted 2016 SWDP City Centre boundary.

Across the Goad survey area, there are a total of 693 retail, leisure and service units that occupy some 142,460sqm gross of floorspace. Within the designated City Centre itself, 513 units occupy 103,130sqm of floorspace. The number of units has decreased from 2014 across both the wider survey area and the City Centre but despite this, the amount of floorspace has increased in both (from 137,520sqm to 142,460sqm gross across the survey area, and from 98,610sqm to 103,130sqm in the City Centre). These changes can be attributed to several recent developments including the 10,000sqm Cathedral Square redevelopment, completed in July 2017, and to the reconfiguration and consolidation of units in other locations such as those at St Martin's Gate on the eastern edge of the City Centre.

Convenience Goods Units

There are currently 38 convenience goods retail units across the survey area occupying some 11,480sqm of floorspace. Since 2014, the Co-op store on Angel Street (circa 820sqm) has closed but several smaller units (including a confectioner, newsagent and a number of e-cigarette shops) have opened. Whilst the number of convenience goods units has increased from 34 to 38, the overall amount of floorspace has marginally decreased (by 40sqm). Despite these changes, the proportion of units and floorspace occupied by convenience goods in the survey area has remained at the same levels as 2014, at 5% of units and 8% of floorspace. This provision is below the national average, where 8% of units and 15% of floorspace within centres are typically occupied by convenience goods uses. Within the City Centre boundary, the proportion of units is also below the national average, but slightly higher than across the survey area (6%), however, owing to the size of the units here, the proportion of floorspace is only 4%, well below the national average.

In terms of the convenience goods retailers present, 13 of the units are occupied by national convenience multiples including Asda, Tesco Express, Iceland, Sainsbury's Local, M&S Foodhall, Hotel Chocolat, and Greggs (2 units), the other units are occupied by independent retailers. In total, the convenience goods provision comprises 10 bakers & confectioners, 8 tobacconists/vape shops, 3 shoe repairers, 5 general convenience stores, 3 health food shops, 2 delicatessens, a CTN (confectionery, tobacco & newsagents) store, a butcher, frozen food retailer, greengrocer, off licence, supermarket, and a series of small market traders which are counted as a single convenience unit at The Gallery on The Shambles.

Asda provides the largest convenience goods unit in the survey area. Located just outside the eastern edge of the City Centre at St Martin's Quarter, the store accommodates some 6,040sqm of floorspace. The majority of the convenience units surveyed are small in size with 30 out of the 38 units occupying units of 130 sqm or less.



Comparison Goods Units

Worcester currently has a strong comparison goods offer, reflecting its status as a key shopping destination. The survey area accommodates a total of 51,510sqm of comparison goods floorspace across 229 units, accounting for 33% of the total units and 36% of the total floorspace. Within the defined City Centre boundary, the proportion of comparison goods units and floorspace is much higher (38% and 42% respectively) and within both the survey area and city centre, the proportion of units and floorspace in comparison goods use is higher than the UK average. Despite this, figures from 2014 point to a declining trend in comparison goods provision. There are now 44 fewer comparison goods units within the survey area compared with 2014, 43 of which have vacated from within the City Centre boundary. Notable stores to have closed include Burtons Menswear, Dorothy Perkins, Early Learning Centre, Swarovski, Three and one of the two Vodafone stores located on The Shambles. The national trend for the proportion of comparison goods units in town/city centres has also seen a decrease during this period of time, albeit not to the same extent. At the time of writing it is unclear whether the House of Fraser in the City Centre is likely to close. The Worcester store was on list of store closures but following Sports Direct acquiring the chain in August 2018 may no longer be closing. Furthermore, whilst there is no evidence to suggest that the M&S or Debenhams stores in Worcester are set to close, M&S are still to announce 50 of the 100 stores that they will close by 2022 and Debenhams hasn't confirmed which of the 50 stores it is likely to close in the next 5 years (if it remained lossmaking). The closure of these key anchor stores would clearly weaken the City Centre's comparison goods offer.

The comparison goods units are predominantly concentrated around the pedestrianised parts of the City Centre and within both parts of the Crowngate Shopping Centre. As would be expected, the majority of national multiples occupy prominent units with local or independent shops located towards the edges of the city centre particularly along New Street / Friar Street and at the Hopmarket.

Multiple retailers such as Marks & Spencer and House of Fraser can act as anchor tenants in a centre, adding to its appeal and creating additional pedestrian footfall. Experian Goad produces a list of the top comparison goods retailers which act as a measure of the vitality and viability of a centre. Of the 31 major retailers within the Experian list, Worcester City Centre hosts 27. The only stores not present within the centre are John Lewis, Waitrose, Burton and Dorothy Perkins.

A large number of other national operators are not included within Experian's list, including those from other sectors. Our analysis has established that the survey area currently contains 171 multiple operators, including 84 comparison goods units, 44 leisure service units, 20 financial and business services, 13 convenience goods operators and 10 retail service units.

The largest comparison goods unit within the City Centre is Marks and Spencer on High Street at 8,640 sqm (3 floors) while other large units include House of Fraser (7,560sqm over 4 floors) and Debenhams (4,600sqm over 4 floors). Although there are other large units across the survey area, 100 of the 229 units occupy 100sqm floorspace or less. The smallest units are located in the Hopmarket.



There is a diverse spread of comparison goods sold across the survey area including art supplies, party goods, kitchen goods, furniture and bicycles & accessories in addition to clothing and footwear retailers, gift shops, jewellers and department stores commonly found in town/city centres nationally.

There are 16 charity shop units across the survey area, 2.3% of the total number of units, this is slightly lower than the national average of 2.7%.

84 of the 229 units in the survey area are occupied by national multiple retailers with many retailers present in Worcester that are not located in any of the other centres in South Worcestershire. Whilst the majority of comparison goods floorspace is occupied by national multiple retailers, the independent retailer offering is strong with such retailers occupying the majority of units in the survey area.

Overall, despite having weakened over the past five years, we consider at the current time the comparison goods offer in Worcester remains reasonably good.

Retail Services

There are 103 retail service units across the survey area, 75 of which are situated within the City Centre boundary. The number of retail service units has increased from 2014 when there were 88 across the survey area and 66 within the City Centre boundary. Both in terms of the proportion of units and floorspace across the survey area, the retail service provision is in line with the national average (15% of units and 7% of floorspace), having been below average in 2014. In particular, the number of hairdressers and beauty salons has increased across the survey area with an additional 3 beauty salons and 6 more hair dressers since 2014.

Of the 103 retail service units across the survey area, 76 are occupied by health & beauty providers and in addition to these, there are 8 opticians and 6 travel agents. Other facilities include an undertakers, dog grooming service, clothing repairs, and vehicle repairs & servicing units.

The retail service providers are generally located away from the primary shopping frontages at the edges of the City Centre and beyond. Within the City Centre, retail service uses are distributed along New Street/Friar Street and on the eastern side of The Shambles. A number of retail service units are also located to the north on The Tything and to the south along the A38 at Sidbury.

Across the survey area, the retail units occupied by retail services are generally small in size, with all but 16 at 150 sqm or smaller. The largest unit is located just outside the City Centre boundary on The Butts and is occupied by Mr Tyre (440sqm). The largest unit within the City Centre is occupied by House of Dogs at 300sqm, where dog grooming services are provided.

Overall, the retail service offer has improved since 2014, and is now considered to be at the level expected for a centre of Worcester's size.



Leisure Services

Overall, 32% of the floorspace (45,200sqm) and 24% of units (167 units) within the survey area are occupied by leisure service providers. The proportion of leisure floorspace is significantly above the national average of 25%, while the proportion of units is in line with the average indicating units in Worcester are generally larger than other centres.

Comparisons with the 2014 survey show that the leisure service offer has expanded considerably over the past five years. There are now an additional 36 units and 11,210sqm of floorspace in the survey area which have mainly been delivered by the Cathedral Square redevelopment which accommodates 8 restaurants and cafes, 2 bars, a hotel, and a gym.

The leisure offer in the survey area comprises 39 cafes, 37 restaurant units, 24 public houses, 19 bars, 8 betting shops, 5 gyms/health clubs, 4 hotels, 3 night-clubs and 2 amusement arcades. In addition to these facilities, there is a bingo hall located on Foregate Street and 2 cinemas, an Odeon just outside the City Centre boundary on Foregate Street, and a large Vue Cinema at the southern extent of the City Centre at College Street/Friar Street. Huntingdon Hall, a live music and theatre venue also serves the City Centre and is located off Deansway at Bell Square.

Leisure units are distributed throughout the City Centre, however there are concentrations at Cathedral Square, on Angel Street/Angel Place, and towards the southern end of Friar Street. Angel Street/Angel Place caters for the night-time economy within Worcester as this area accommodates 2 nightclubs, several pubs and bars and fast food/takeaway establishments. Cathedral Square caters for both the day time and evening economy, accommodating large national leisure operators such as Ask Italian, Pizza Express, All Bar One, Yo! Sushi, Starbucks and Miller & Carter. The leisure offer along Friar Street comprises several pubs and independent or locally owned cafes and restaurants.

The leisure offer within the City Centre is supported by Worcester Racecourse, The Swan Theatre and New Road, the Worcestershire County Cricket Club cricket ground, which are situated within walking distance of the centre. These facilities attract significant numbers of visitors, providing residual benefits to businesses within the City Centre.

We consider Worcester to provide a reasonably good range of leisure facilities serving both the day-time and evening economies.



Financial and Business Services

There is a total of 68 units (10% of the total) providing financial and business services within the survey area, occupying 11,210sqm of floorspace (8% of the total). Within the City Centre boundary, most of the facilities are located at the junction of High Street/The Cross with Broad Street/St Swithins Street where 7 banks and building societies are located. The majority of the other financial and business services are located outside of the City Centre boundary, along Foregate Street and The Tything to the north. The proportion of floorspace and units across the survey area is in line with the national average (8% and 10% respectively).

As would be expected for a major centre like Worcester, it has retained its high street banks despite a trend of closures across the country. Since 2014, the only unit to have closed is RBS which previously occupied a unit on St Nicholas Street. The survey area provides 9 major high street banks/building societies, 16 employment agencies, 15 estate agencies, 11 solicitors, 4 accountants and financial advisors in addition to other facilities including a post office, printing centre, bureau de changes and insurance offices.

Markets

A street market operates in Angel Place between 09:00 and 16:30 on Wednesday to Saturday each week with a mixture of stalls selling fresh food, household goods and local produce. Worcester Upmarket operates along High Street on Saturdays and sells handmade gifts, jewellery, street food and clothing. Additionally, seasonal markets operate throughout the year including The Victorian Christmas Market and at Spring, Easter and Harvest festivals.

Events

Numerous events are held in Worcester City Centre throughout the year including the annual Victorian Christmas Market (attracting 125,000 visitors over three days), Music Festival (8-10,000 attendees), Carnival, and Worcester Show. Other regular events include the Worcester Race for Life, the Beer & Cider Festival, Worcester 10k and Half Marathon, and the Three Choirs Festival that is held every three years.

Non-Retail/Commercial Units

In addition to the retail, commercial and leisure units identified above, the survey area also accommodates several churches and places of worship, The Hive library and educational facility, numerous offices, community centres, a health centre and dental surgery. The City Campus of the University of Worcester is located approximately 200m north of the city centre boundary on Castle Street and Worcester Racecourse and the cricket ground are both within walking distance too. Worcester Cathedral is situated at the southern edge of the City Centre and this along with Greyfriars House, Huntingdon Hall, The Guildhall and four museums also attract visitors and tourists to the City Centre. Worcester Cathedral is an important visitor attraction attracting over 315,000 visitors per annum and an important asset to the City Centre. Information from the City of Worcester Tourism Strategy 2017-2022 (Worcester City Council) indicates that between 2013-2015, visitor numbers to the city grew by 6.5% and spending increased by 6.3%. In total, 3.4 million people visited Worcester in 2015, spending a total of £130 million.

Operator Requirements

Operator	Min Size (sq m)	Max Size (sq m)	Operator	Min Size (sq m)	Max Size (sq m)
Retail/Services					
Metro Bank	325		Buyology	1,394	3,716
Cards Direct	111	139	Explore Learning	121	232
Sue Ryder	186	743	Kennelgate	232	465
Tool Station	260	557	Lidl	929	2,787
Brook Taverner	139		Acorns Children's Hospice	139	650
Fragrance Shop	19	139	British Heart Foundation	465	743
Pets & Friends	232	465	Hammonds Furniture	139	372
Menkind	111		Supercuts	56	70
Vets 4 Pets	139	189	Heron Foods	232	465
Aldi	1,765 (min)		A Write Card	139	232
Calendar Club	74	186			
Leisure – Food & Drink					
GDK	116	232	KFC	167	325
Baresca	325	418	Amber Taverns	200	
Triple Two	93	186	Hubbox	167	279
Leisure - Other					
Snap Fitness (WM)	372	929	Simply Gym	557	1,858
Village Hotels	5,574	8,361	Simply Play	464	1,858
Pop World	465		Consol	111	186
Jump In	1,858	3,252			

Source: Retailer Requirements List, March 2019

In assessing the health of centres, it is also relevant to consider which retailer/leisure operators may be intending to seek representation in Worcester City Centre in the future. 'The Requirements List' sets out requirements for additional floorspace in particular town/city centres. It should be noted that each retailer/leisure operator will have particular size, layout and format requirements and that some operators may not have specifically identified town/city centre representation, instead targeting regions or even nationwide expansion. Whilst 'The Requirements List' principally records the requirements of high street multiple operators, it is of relevance in identifying the type and broad number of operators currently seeking representation.

'The Requirements List' identifies (data at March 2019) a total of 34 retail and commercial leisure operators currently seeking premises in Worcester.

The table shows that, despite the current retail climate, there is good level of demand from a mix of retail and commercial leisure operators seeking representation in Worcester and its City Centre.

Vacancies

There are a total of 88 vacant retail and service units across the survey area, accounting for 13% of all units, higher than the national average of 11%. However, vacant units occupy 12,870 sqm of floorspace, which is 9% of the total floorspace, slightly lower than the national average of 10%. Although the vacancy rate is higher than we would expect, the situation has improved since 2014, when there were 108 vacant units (15% of the total), occupying 12% of the total floorspace. Within the City Centre boundary, a similar trend is visible. 69 units are vacant (13% of units) leaving 12,870sqm of floor space unoccupied, 10% of floorspace across the City Centre. Vacancy rates have fallen since 2014 when the proportion of vacant units was 15% and the proportion of vacant floorspace 12%.

The reduction in vacant units across the survey area over the last 5 years (-20 units) indicates that the Worcester is bucking the national trend of increasing vacancy levels.

Vacant units are generally dispersed across the survey area although there is a concentration within the vicinity of Reindeer Court where 13 units are presently empty and Friary Walk area of the Crowngate Shopping Centre where 9 units are vacant. Other areas of vacancy were noted at the corner of Queen Street/The Trinity and St Nicholas Street. In terms of Reindeer Court vacancies, we understand that it has had many vacancies most of the time for at least the last 15 years. The vacancy issue may be as a result of a combination of things, including size/type of units, its not particularly prominent location, and rents sought for the units.

Redevelopment works are currently taking place at Angel Place where the entranceway to the Crowngate Shopping Centre is being modernised. We understand public realm improvement works are also shortly due to commence along The Shambles outside an entrance to Reindeer Court. These works provide an opportunity to breathe new life into these locations, improve the attractiveness of these areas and improve the marketability of vacant units.



Photograph 7: Former Coop unit on Angel Street

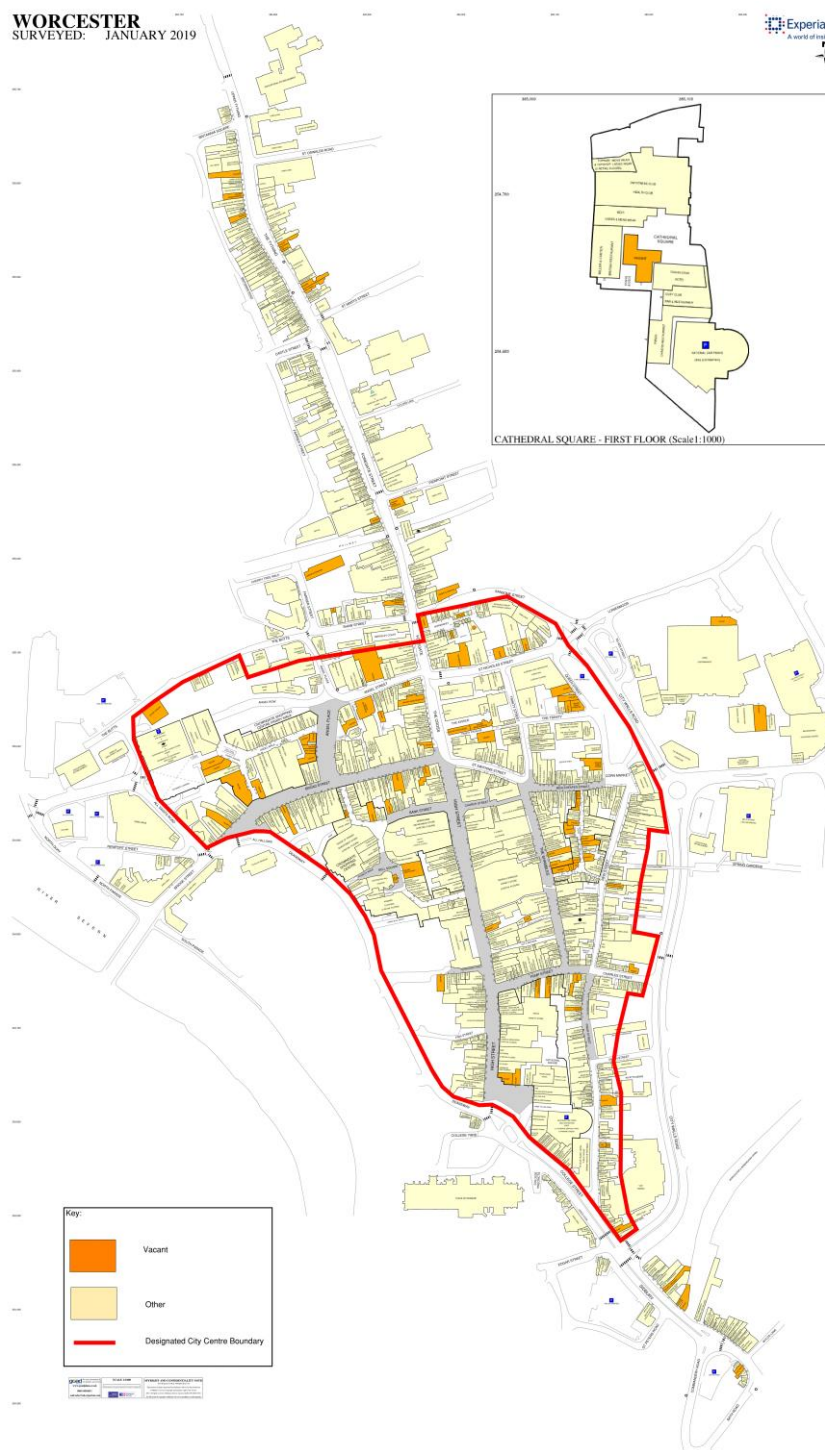


Photograph 8: Vacant unit at Reindeer Court



Photograph 9: Vacant unit in Friary Walk

Vacancies



Rents on Non-Domestic Property

A review across a range of online sources indicates that rents on available commercial units vary across the City Centre. As is to be expected, rents are generally cheaper towards the edges of the City Centre, while those within the core shopping areas command higher rents.

In terms of £/sq.ft, the cheapest available unit is the former Co-op unit on Angel Street at £4.98/sq.ft. Located in an area of comparatively low footfall and poor environmental quality, this relatively cheap rent is reflective of a less desirable location and of the overall size of the unit at 12,000 sq.ft. The complete unit is available at a rent of £60,000 per annum.

At Reindeer Court, our searches indicate that units are available at between £9.50 and £15/sq.ft and vary in size between 270 and 2,200sq.ft. This area is away from the main pedestrian routes in the City Centre and the cheaper rents are perhaps reflective of the lower footfall at this location.

The small units at The Hopmarket (between 100 and 400 sq.ft) command rents of between £20 and £25/sq.ft while those within Friary Walk attracts rents of £27.50 to £30/sq.ft. Our searches indicate that units at Chapel Walk in the Crowngate Shopping Centre, at The Shambles and on Broad Street command the highest rents in the City Centre. Those on Broad Street are available at between £30 and £35/sq.ft, units along The Shambles command rents of around £39/sq.ft while those at Chapel Walk are available at between £38 to £51/sq.ft.

When compared to other retail destinations in neighbouring centres, rents on available units in Cheltenham Town Centre are generally higher (between £30 and £84/sq.ft) than those in Worcester. Units in Gloucester and Hereford are broadly at the same level as in Worcester and units in Kidderminster and Tewkesbury are generally available at lower rents than Worcester.

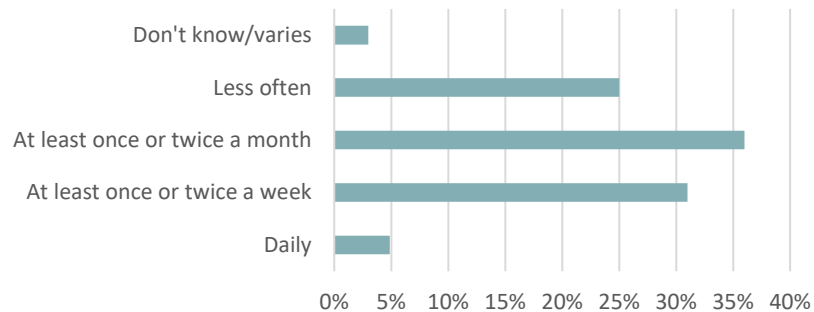
Customers' Views and Behaviour

Using data from the NEMS household survey, we have been able to identify behaviour and the main reasons why respondents visit Worcester City Centre, what they like about it and what, if anything, would encourage them to visit the centre more often.

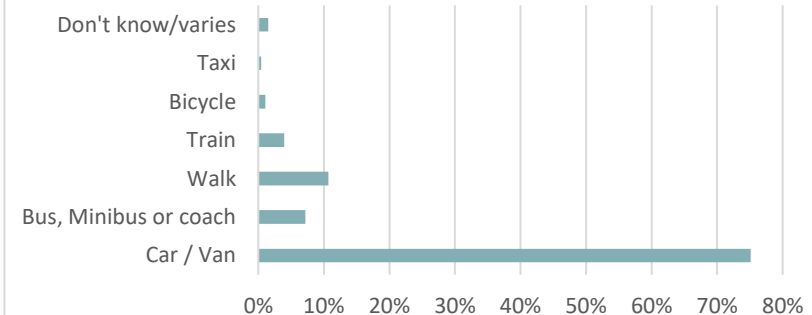
Of those who visit Worcester City Centre, 5% visit on a daily basis which suggest that they either work or live in the City Centre. Some 31% of respondents visit at least once or twice a week whilst 36% visit at least once or twice a month. A quarter of respondents indicated that they visit less often than once a month.

In relation to how people travel to the City Centre, the majority (75%) do so by car/van. The second most popular response was walking (11%) with 7% of visitors using the bus, 4% the train and 1% on bicycle.

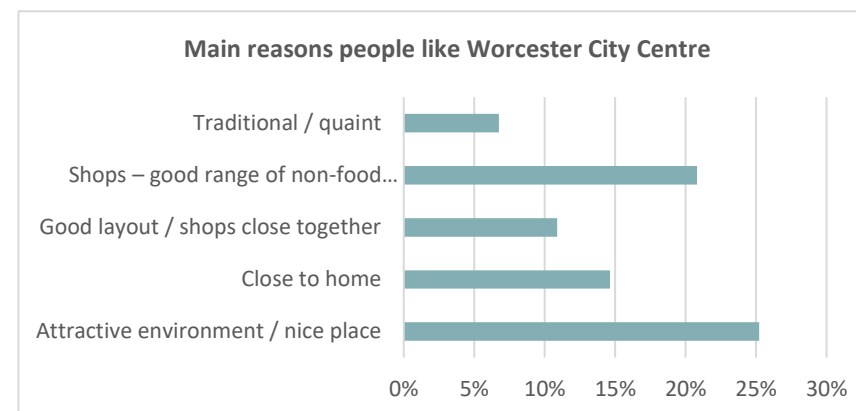
How often do people visit Worcester City Centre



How to people usually travel to Worcester City Centre

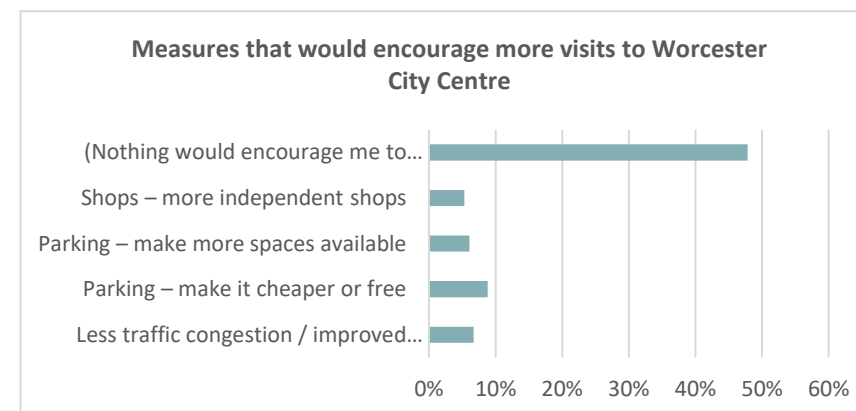


Non-food shopping is by far the most common reason why people visit the City Centre (70% of responses), followed by visiting for a day out (23%) and visiting to go to cafes or restaurants (21%). Other reasons include visiting for food shopping (10%), visiting to meet friends (6%), visiting financial services (6%) and to go to work (5%).



In terms of what people like about Worcester, 25% of respondents liked the City Centre because it provides an attractive environment or is a nice place, and 21% like the range of non-food shops. 15% of respondents like the City Centre because it is close to home, 11% said it had a good layout with shops close together, and 7% liked that the City Centre is traditional or quaint.

When asked about what would encourage them to visit the City Centre more often, parking was a common theme; 9% of respondents said that parking could be made cheaper or free, while 6% said that more parking spaces could be made available. Other answers included reducing traffic congestion in the City Centre (7%) and having more independent shops (5%). Approximately half of the respondents said that nothing would encourage them to visit the City Centre more regularly which suggest that they are satisfied with the City Centre as it is.



Pedestrian Flows

Pedestrian counts undertaken by Worcester BID indicate that footfall in Worcester City Centre increased in 2018 by 0.3%, bucking national trends. Visitor numbers peaked in December 2018 at 2.4 million visitors following a 'Christmas in Worcester' campaign by the BID team in partnership with Worcester City Council, Crowngate Shopping Centre and Cathedral Square.

Pedestrian counts are routinely undertaken by Worcester BID at four locations in the centre: outside Marks & Spencer on High Street, at Pump Street, outside Specsavers on Broad Street and at the southern end of High Street. The latest data from October 2018 indicates that Broad Street and High Street by M&S are the busiest of the four locations, followed by the southern end of High Street and then Pump Street, which received approximately 10% of pedestrians counted. A further breakdown of this data indicates that pedestrian activity across the City Centre is concentrated during the hours of 11:30 and 15:30 on Weekdays, and between 13:00 and 17:00 on Saturdays. As would be expected, significantly more people are shown to visit the City Centre on a Saturday than any other day of the week.

During our visits good levels of pedestrian activity were observed across the pedestrianised streets in the City Centre. High Street and Broad Street were busy, as were the thoroughfares at Chapel Walk in the Crowngate Shopping Centre. A steady flow of pedestrians was observed from the car park at Cathedral Square and along High Street.

Outside of the main shopping streets, pedestrian activity was more variable. To the north of the City Centre from The Cross and towards Foregate Street, activity levels were steady with those working in nearby offices. Lower levels of footfall were observed in the Friary Walk Shopping Centre and at the bus station. Although this is one of the main gateways into the City Centre, at the time of our visits, it was quiet with a low level of activity. Similarly, at Angel Street and Angel Place, there was a low level of pedestrian activity at the time of our visits. This area has a concentration of nightclubs, bars and takeaway units geared towards the evening economy. The lack of daytime active frontages coupled with the generally poor environmental quality contribute to a general sense of emptiness.

Pedestrian footfall also dropped off to the south east of the City Centre, at Friar Street, which is away from the main shopping area. This street is clearly not a key thoroughfare although the presence of the car park and large Vue Cinema present an opportunity to encourage people north towards the City Centre from these facilities.

Accessibility

The accessibility of the centre is determined by the ease and convenience of access by a choice of means of travel, including that which is provided to pedestrians, cyclists and disabled people, and the ease of access from the main arrival points to the principle attractions in the centre.

Road Access

Worcester City Centre is very well connected to the surrounding area by virtue of its proximity to the strategic highway network. The M5 provides connections to Bromsgrove and Birmingham to the north, and Tewkesbury, Cheltenham and Gloucester to the south. To the south west of the city lies Malvern approximately 16km away, and to the east, Evesham is 26km via the A44.

In terms of the local highway network, the City Centre's extensive pedestrianised area prevents direct vehicle access to much of the retail core. The pedestrianisation is combined with other vehicle restrictions, such as bus and taxi only routes, and roads where vehicles are prohibited during the day. These restrictions mean that those travelling to the City Centre are encouraged to use one of the numerous car parks just outside of the City Centre, or to use alternative means of travel.

We noted that the roads in the City Centre were very busy during our visits, especially the A44 College Street/Deansway to the south and west of the centre, and the one-way system at St Nicolas St/Sansome St to the north. The A4440 to the south of the City Centre is subject to ongoing improvement works at present and a further £55m funding has recently been announced to provide an extra stretch of dual carriageway here. The road provides an important bypass of the City Centre and the improvement works aim to ease congestion here and encourage more motorists to bypass the roads in the City Centre.

Despite the busy traffic, we note that the NEMS household survey identifies that only 7% of respondents would be encouraged to visit the City Centre more often if there were less traffic congestion / better access indicating that for those visiting, traffic is not a main concern.

Car Parking

There are numerous Council operated and privately-run car parks in and around Worcester City Centre. The City Council operate 14 of these, while others are operated by NCP and the Crowngate Shopping Centre among others. Large car parks include:

- Copenhagen Street (161 spaces)
- Cornmarket (80 spaces)
- Providence Street (58 spaces)
- Cattle Market (186 spaces)
- St Martin's Gate (780 spaces)
- Croft Road (231 spaces)
- Pitchcroft (435 spaces)
- NCP Cathedral Square (325 spaces)
- King Street (108 spaces)
- Newport Street (138 spaces)
- Crowngate Shopping Centre (750 spaces)



Seven variable message signs are located along main approaches to the City Centre providing real-time information in relation to the four nearest of the six busiest car parks. We consider there to be a good distribution of car parks and at the time of our visits, capacity was observed in the majority of car parks. The council operated car parking is divided into three zones with tariffs set according to how centrally they are located, reduced parking charges apply for stays of less than 30 minutes and for parking between 19:00 and 21:00 across the city centre and charges are broadly in line with car parks operated by other authorities in South Worcestershire. Electric car charging points are available in Crowngate Car Park (6 points) and at St Martin's Gate (3 points).

Overall, we consider there to be a good range, distribution, and quantity of car parking spaces within walking distance of the City Centre.

Public Transport

Worcester has 2 railway stations close to the City Centre. Worcester Foregate Street lies in the northern part of the City Centre, and Worcester Shrub Hill approximately 650 metres walking distance to the east. Trains from Foregate Street and from Shrub Hill are available to Birmingham New St, Cheltenham, Gloucester, Bristol and Bath, and to London Paddington.

Busses in Worcester operate from a bus station underneath Friary Walk, part of the Crowngate Shopping Centre. Whilst the bus station receives national, regional and local services from operators including National Express, LMS Travel and First Worcestershire, it is not a particularly attractive 'gateway' into the City. Popular bus stops are also located on Sansome Street and at Cathedral Square. Park and Ride services in Worcester were withdrawn in September 2014.

Walking, Cycling and Disabled Access

Access for pedestrians and cyclists within Worcester is generally good, helped by relatively flat topography and the pedestrianised shopping streets.

Notwithstanding this, some pedestrian connectivity is hampered by the busy roads in the north of the city centre along St Nicholas Street, Sansome Street, The Cross and Angel Street. Seating opportunities are provided in various locations throughout the City Centre.

Despite the River Severn flowing through central Worcester, there are relatively few connections linking the riverside to the City Centre. Similarly, connectivity with the canal to the south and east of the City Centre is considered to be generally poor.

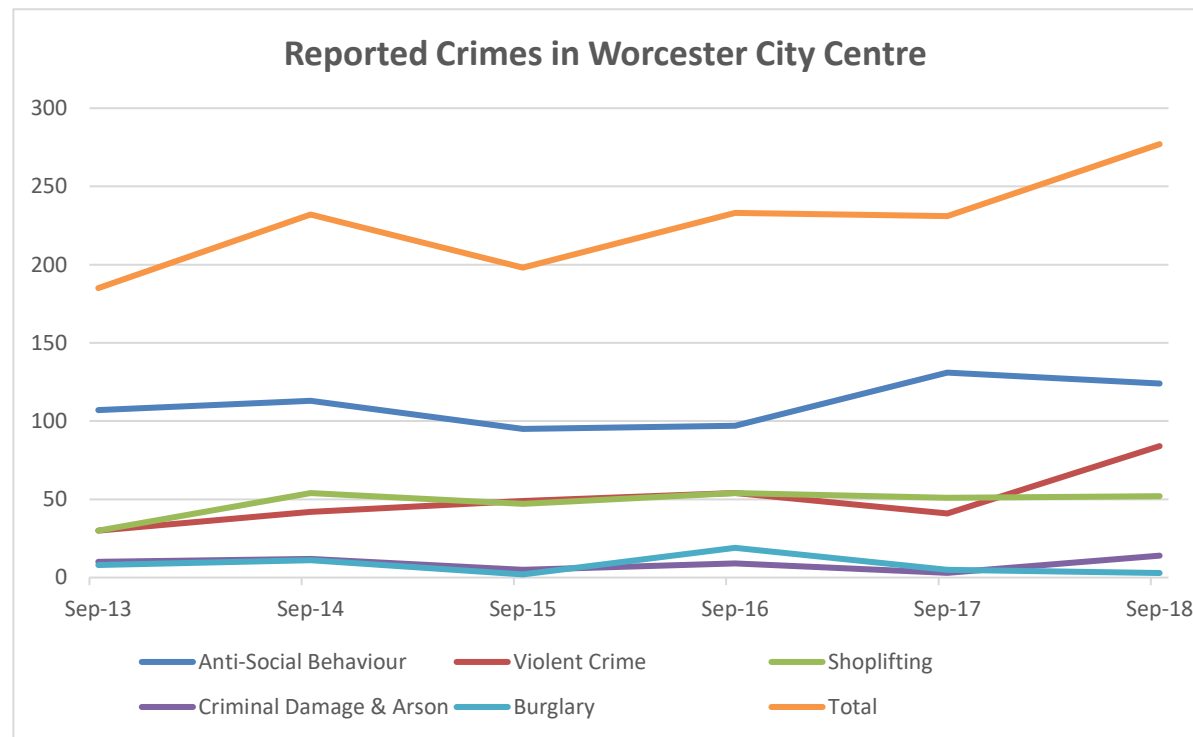
In terms of cycling, National Cycle Routes 45 and 46 run close to the City Centre and provide links to nearby Droitwich, north to Chester, and south to Salisbury. A large amount of cycle parking is provided at the junction of The Cross and St Nicholas Street in 2 large covered shelters. At the time of our visits, the spaces were reasonably well used. Additional cycle parking is provided at other appropriate locations within the City Centre, again appearing to be reasonably well used at the time of our visits.

The City Centre is considered to provide good disabled accessibility, again assisted pedestrianised streets and relatively flat topography. In all Council operated car parks, with the exception of Cornmarket, free and unlimited car parking is available for blue badge holders.

Perception of Safety and Occurrence of Crime

A study of crime statistics shows that reports of five common 'town/city centre' crimes in a given month over the past five years have varied. In September 2013 there were 185 reports of anti-social behaviour, violent crime, shoplifting, criminal damage & arson, and burglary. In September 2016, reports of these crimes had increased to 233, and in September 2018, they had again increased to 277. Incidences of anti-social behaviour have consistently been the most commonly reported crime across Worcester City Centre followed by reports of violent crime and shoplifting.

In terms of the location of crime within the City Centre, particular concentrations are apparent at The Cross and on Angel Street. The Cross is one of the main thoroughfares, while Angel Street has numerous public houses, several nightclubs and takeaway establishments close by. It is likely that groups of people will congregate in these areas late at night which may explain the reports of crimes here.



Worcester City Centre benefits from CityNet, a business crime reduction partnership run by Worcester BID. The scheme, which has 150 businesses 'signed up', supports both the day and night-time economies helping to give a joined-up approach to addressing crime. The BID's website identifies that *"the scheme aims to deliver an intelligence led approach to managing crime in the City Centre and provides a shared radio network, mobile phone app and website to report incidents"*.

Using a ranking system where 0 equals lowest and 100 equals highest, Figure 5 below compares the crime rates within Worcester City Centre with five other town or city centres in the surrounding area. The overall crime rate in Worcester City Centre is shown to be lower than in Hereford and Gloucester City Centres, it is broadly similar to Cheltenham Town Centre albeit higher than Redditch and Kidderminster Town Centres.

When compared to other nearby large centres, Worcester City Centre has the second highest rate of shoplifting (99.874) and criminal damage (99.357) behind Gloucester (99.966 and 99.865), a higher rate than Hereford, Kidderminster, Redditch and Cheltenham. With violent crime, Worcester City Centre has a lower crime rate (99.787) than Gloucester (99.949) and Hereford (99.865), but higher than Kidderminster, Redditch and Cheltenham). Similarly, Worcester's Burglary rate is the lower than both Gloucester and Kidderminster.

Anti-social behaviour in Worcester City Centre is comparable to that in Hereford's centre (99.955 and 99.966). This is higher than in Cheltenham and Kidderminster, but lower than Gloucester.

Figure 5: Comparison of Worcester City Centre's Crime Rankings with other nearby Centres

Crime	Worcester City Centre	Hereford City Centre	Kidderminster Town Centre	Redditch Town Centre	Cheltenham Town Centre	Gloucester City Centre
All Crime	99.868	99.882	99.571	99.503	98.866	99.969
Anti-Social Behaviour	99.955	99.966	99.714	99.672	99.487	99.983
Violent Crime	99.787	99.865	99.307	99.638	73.358	99.949
Shoplifting	99.874	99.562	99.759	99.464	98.507	99.966
Criminal Damage & Arson	99.357	99.324	98.255	98.667	97.946	99.865
Burglary	98.347	97.511	99.773	84.59	90.878	99.919

Notes: Crime rankings from equivalent Lower Super Output Area's (LSOA) at each town/city centre (Source: UKCrimestats.com)



City Centre Environmental Quality

Worcester generally provides a good quality environment with attractive open public spaces and historic buildings. Whilst some parts of the city were subject to redevelopment in the post-war period, many historic and attractive buildings survive in the centre such as the Guildhall and the numerous half-timbered buildings along Friar and New Street which enhance the street scene. Other more recent developments such as Cathedral Square and Chapel Walk provide a high quality and modern shopping environment, with Cathedral Square in particular providing an attractive gateway into the City Centre, linking the main shopping area with the cathedral.

Across the City Centre, shop fronts are generally well maintained and the pedestrianised streets are clean and tidy. Trees planted at regular intervals along High Street and Broad Street help to break up the hard paving and provide shade during the summer months. Plenty of benches are provided and other street furniture such as way posts and signage is generally of a good quality. The pedestrianised areas give a safe environment for pedestrians and the paving treatments along High Street and Broad Street are of a good quality. However, we noted at the time of our visits that the quality of the public realm along The Shambles was noticeably poor and there were numerous points where the brick paving had been unsympathetically patched with tarmac. We understand that some £1m in funding has recently been secured for public realm improvement works to The Shambles including new paving, planting and additional street furniture. These improvements have commenced and will be complete before the end of 2019.

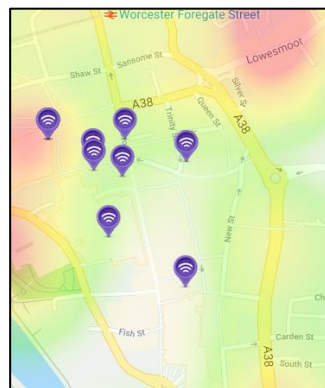
Whilst much of the City Centre provides a generally pleasant environment, the quality of Angel Street detracts from its surroundings. The street has few active frontages and the vacant former Coop store is untidy and is clearly in need of maintenance. Traffic from the nearby bus station can at times dominate the street scene and at the time of our visits there was noticeably less footfall here than in surrounding streets. This area provides several bars, nightclubs, fast food takeaway units and public houses and as a consequence feels less vibrant during daytime hours. At several other locations within the Centre, we noted that the upper storeys of buildings above retail units appeared to be in need of maintenance and in an unkempt state,

The bus station below Friar's Walk/The Crowngate Shopping Centre is another area where we feel that improvement should be focussed. As a key gateway into the city, it presents the opportunity to give a positive first impression for visitors to the city, but at present it is dark, has limited seating and feels disconnected from the rest of the City Centre.

Overall, notwithstanding the above-mentioned areas, we consider that the City Centre provides a pleasant and generally attractive environment. Our assessment is supported by the findings of the household survey where a high number of respondents cited that they liked the City Centre due to its attractive environment.

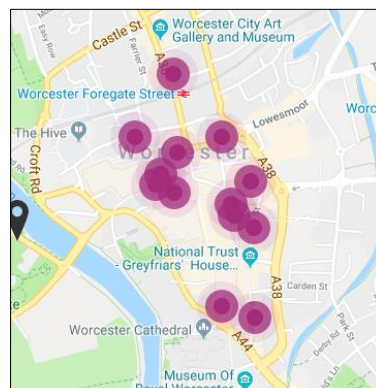
Digital Facilities in Worcester City Centre

BT Wi-Fi Hotspots



Source: www.btwifi.co.uk/find/

Sky Cloud Wi-Fi Hotspots



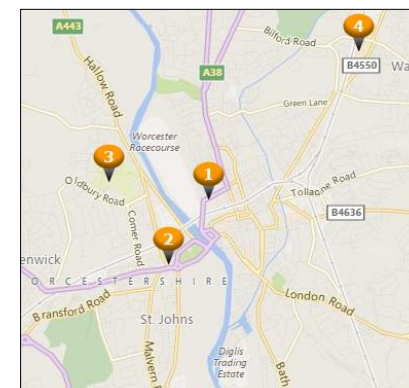
Source: www.thecloud.net/free-wifi/find-a-hotspot/

Collect+ Locations



Source: www.collectplus.co.uk/store_locator/

Amazon Locker Locations



Source: amazon.co.uk

Developing a 'bricks & clicks' environment can benefit a town/city centre by attracting additional visitors and bringing a further layer of interaction through the promotion of events and advertising. BT and The Cloud (now Sky) are identified by the ATCM (Association of Town & City Management) as providing the widely available free Wi-Fi hotspots within town centres, while Collect + and Amazon provide town centre facilities where customers can collect items that they have ordered from online retailers.

There are 7 BT hotspots and 11 Sky Cloud hotspots providing wide coverage of free-Wi-Fi across the City Centre. In addition, Worcester City Council, in partnership with Worcester BID, have resolved to introduce City Centre wide free Wi-Fi in a separate scheme and we understand this will be delivered by the end of 2019. There are currently no Collect+ locations within the defined City Centre boundary, but three are located close by at Castle Street, Cecil Road, and on Bath Road to the north, east and south of the city centre. Similarly, there are no Amazon Lockers available within the City Centre. A locker restricted to students of the University of Worcester is however available at Castle Street, to the north west of the City Centre.

It is considered that the City Centre is well served by free wi-fi provision, but is not particularly well catered for in terms of collect + and Amazon parcel drop off/pick up points.



Conclusions

Overall, Worcester City Centre is considered to display reasonable levels of vitality and viability. Having regard to our health check assessment, including feedback from key stakeholders, we consider that the principal strengths, weaknesses, opportunities and threats to the centre are as follows:

Strengths and Opportunities

- The City Centre is considered to provide a strong comparison goods offer. There is a high representation of top national retailers. 27 out of the 31 stores featured in Experian's list of major retailers are present within the city centre.
- The City Centre provides a pleasant and attractive environment. There are areas in the City Centre which would benefit from improvement. Opportunities have already been recognised and are being delivered at the Shambles and Angel Place/Friary Walk.
- The pedestrianised areas are generally well maintained, clean and tidy, and provide a safe and secure shopping environment.
- There is good distribution of parking facilities.
- Road improvements to help reduce congestion are underway on the edges of the City.
- The recent redevelopment of Cathedral Square has significantly improved the leisure provision and enhanced a key pedestrian gateway into the City Centre.
- Retail services in the City Centre have improved over recent years.
- The City Centre provides a good range of leisure facilities serving both the day-time and evening economies.
- Vacancies have fallen over the past 5 years. Whilst the proportion of vacant units remains above the UK average the proportion of vacant floorspace across Worcester is lower.
- Against the national trend, pedestrian footfall in the City Centre has increased in recent years.
- There is an active and successful Business Improvement District in Worcester working in partnership with the Council, retailers and local businesses.
- The City Centre benefits from a number of non-retail uses (including the University of Worcester, tourist attractions (Cathedral)) which attracts visitors/tourists to the City Centre.



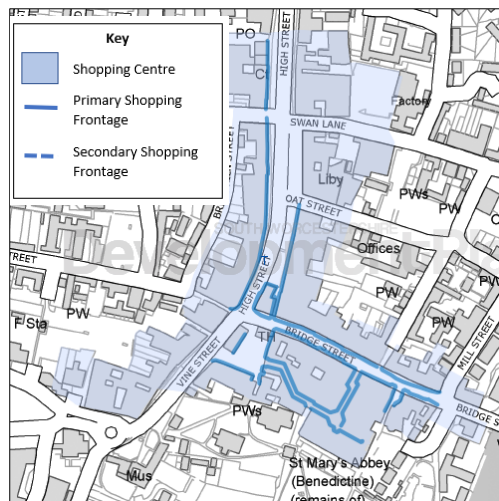
- A City Centre Masterplan is being produced by the City Council which will help aid future development in the City Centre.
- Despite the current retail climate, there is a good level of demand from a mix of retail and commercial leisure operators seeking representation in the City Centre.
- Improvements in access to riverside and canalside locations present a key opportunity to enhance the attractiveness of the City Centre and increase visitor dwell-time.
- Active and engaged BID team

Weaknesses and Threats

- There is a concentration of vacant units at Reindeer Court and Friary Walk which detract from the vitality of these areas
- The bus station at Friary Walk / The Crowngate Shopping Centre is presently unwelcoming and of poor environmental quality. As a key gateway to the city it should be a focus for improvement/enhancement.
- Despite the existing good comparison goods provision, the sector has weakened over the past 5 years. M&S, Debenhams and House of Fraser are currently considering store closures across the UK and the potential loss of one or a number of these key anchor stores would weaken the City Centre's comparison goods offer.
- Lower pedestrian activity levels were monitored towards the edges of the City Centre at the southern end of Friar Street and at Angel Street/Angel Place
- The poor environmental quality of Angel Street detracts from this part of the City Centre.
- The local highway network can often become congested, particularly at busy periods of the day affecting environmental quality and affecting connectivity.
- Potential further out-of-centre retail/leisure development which isn't well connected to the centre could weaken the comparison goods sector.
- Competition from regional centres such as Birmingham and Cheltenham is likely to increase as a result of recent/future investment in these centres.

Evesham Town Centre Health Check Appraisal

Evesham is one of three towns within Wychavon District. Located at the junction of the A44 and A46(T), the town is reasonably well connected to the surrounding area including the major settlements of Worcester (26km driving distance), Tewkesbury (23.3km) and Stratford-upon-Avon (23km).



The town centre, as designated on the South Worcestershire Development Plan (SWDP) Policies Map, primarily extends along Vine Street, the southern end of High Street, and western end of Bridge Street (to the West of Workman Bridge). This boundary encompasses the Riverside Shopping Centre off Bridge Street and an Aldi foodstore on Swan Lane, but the newly opened Waitrose supermarket (November 2018) at Merstow Green/Bourne's Place currently lies just outside the boundary to the south-west.

Across Workman Bridge to the east of the town centre is another smaller area of commercial activity on Port Street containing several restaurants and takeaways, international food stores, public houses, and an independent cinema. This, whilst currently defined as a 'Secondary Shopping Frontage', falls outside the designated town centre boundary.

Additional out of centre retail facilities are located at Four pools Retail Park in the south east of Evesham, along Worcester Road to the north west and at 'The Valley' shopping park off the A46 to the north of the Town Centre.

In August 2017, the Riverside Shopping Centre was sold to Chase Commercial Ltd. We understand that the company are seeking to redevelop the shopping centre with a mixed-use scheme featuring a reduced amount of retail space alongside leisure, residential and community facilities.

The key facilities currently located in the town centre are set out in Figure 1 below:

Figure 1: Key Facilities Located in the Town Centre

National Operators	Total
Key Anchor Stores: Waitrose, Aldi, Home Bargains and Co-op Other National Operators: Boots, Vodafone, O2, New Look, W H Smith, Clintons, Superdrug, Sports Direct	50
Community Facilities	
Evesham Abbey Bell Tower, Almonry Museum, veterinary hospital, Evesham Volunteer centre, Library, Registry Office, Youth Centre & Town Hall	8

Photographs of Evesham Town Centre



Photograph 1: The Royal Oak, Vine Street



Photograph 2: Allee de Dreux



Photograph 3: Bridge Street (western end)



Photograph 4: Market Square

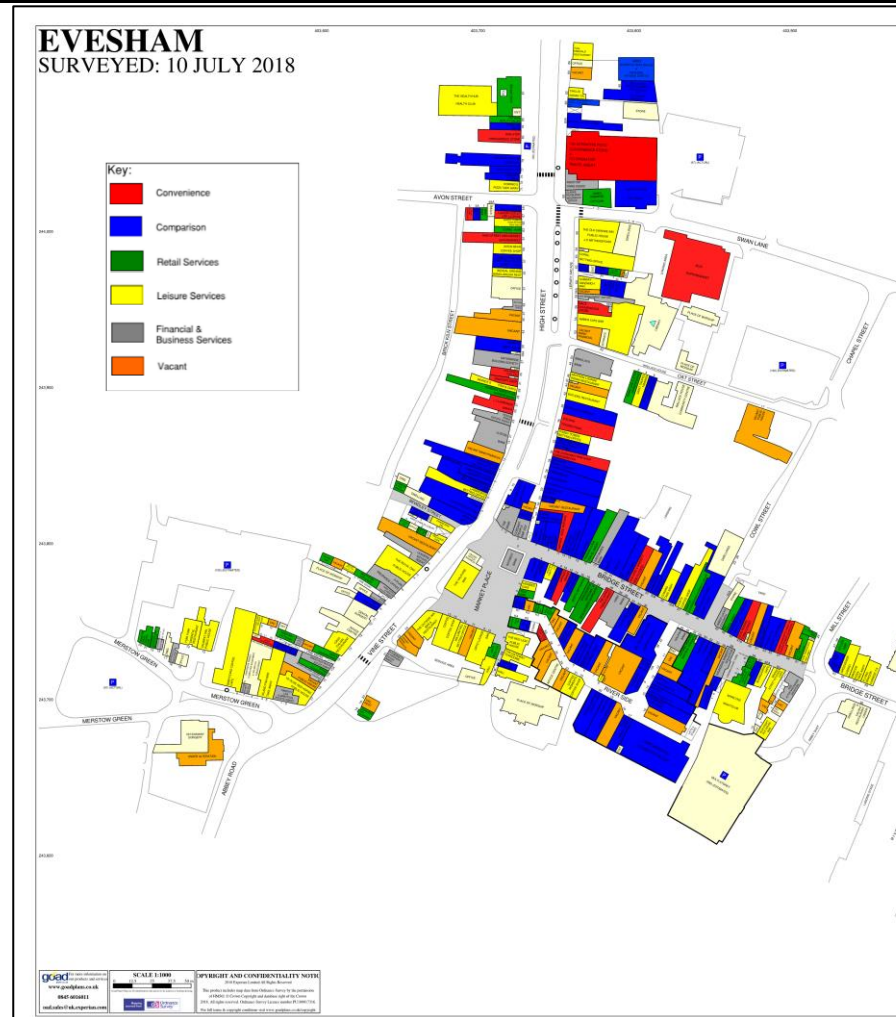


Photograph 5: Bridge Street (eastern end)



Photograph 6: Riverside Shopping Centre

Diversity of Main Town Centre Uses



Diversity of Main Town Centre Uses

Figure 2: Number of Units in Evesham Town Centre (2014)

Category	No.	%	UK Av. %
Convenience	19	7	8
Comparison	88	33	33
Retail Service	32	12	14
Leisure Services	45	17	22
Financial and Business Services	31	12	11
Vacant	50	19	12
Total	265	100	100

Source: Experian

Figure 4: Number of Units in Evesham Town Centre (2018)

Category	No.	%	UK Av. %
Convenience	21	8	9
Comparison	77	29	30
Retail Service	36	14	15
Leisure Services	53	20	24
Financial and Business Services	32	12	10
Vacant	43	16	11
Total	262	100	100

Source: Experian

Figure 3: Floorspace in Evesham Town Centre (2014)

Category	Sq.m	%	UK Av. %
Convenience	5,200	12	15
Comparison	15,030	34	35
Retail Service	3,340	8	7
Leisure Services	8,590	20	25
Financial and Business Services	4,370	10	8
Vacant	7,300	17	10
Total	43,830	100	100

Source: Experian

Figure 5: Floorspace in Evesham Town Centre (2018)

Category	Sq.m	%	UK Av. %
Convenience	5,680	13	15
Comparison	14,370	33	35
Retail Service	3,400	8	7
Leisure Services	9,850	22	25
Financial and Business Services	4,360	10	8
Vacant	6,240	14	10
Total	43,900	100	100

Source: Experian

Diversity of Main Town Centre Uses

Evesham Town centre provides a total of 262 retail and leisure units. This represents a slight decrease from 2014 when 265 units were recorded. In terms of the amount of retail, service and leisure floorspace within the centre, the overall level of floorspace (including units which are currently vacant) remains largely unchanged since 2014 (circa 43,900 sqm). Overall, the surveys show that town centre has neither contracted or expanded in the last 5 years.

Convenience Goods Units

There are currently 21 convenience units in Evesham Town Centre (8% of the total units) occupying 5,680 sq m of floorspace (13% of the total floorspace). The proportion of units occupied by convenience goods floorspace is broadly comparable to the UK average (9%), however, in floorspace terms it is slightly lower than the UK average (15%). The number of convenience units has increased by 2 since 2014 with a small increase in floorspace also. These figures do not account for the newly opened Waitrose store (approx. 2,650sqm) just outside the town centre boundary at Merstow Green. If this store was included within the town centre boundary, the proportion of floorspace in convenience goods use would be 18%, three percentage points higher than the national average.

The largest convenience units in the town centre are the Co-op and Aldi stores which provide approximately 1,560 sqm and 1,380 sqm convenience floorspace respectively. These two stores provide over half of the convenience goods floorspace provision. Other national convenience multiples in the town include Holland & Barrett, Greggs bakers, Iceland, One Stop and Timpson. The remaining 14 convenience units are occupied by independent retailers including 3 tobacconists, 2 bakeries, a health food shop, 2 confectioners, an off licence and several small convenience stores.

Overall, the convenience goods offer in the town centre has strengthened over the last 5 years.

Comparison Goods Units

There is 14,370 sqm of comparison goods floorspace across 77 units in Evesham, accounting for 29% of the total units and 33% of the total floorspace across the town centre. Both the proportion of units and floorspace in comparison goods use is slightly lower than the UK average, where typically 30% of units, and 35% of floorspace is occupied by comparison goods retailers. Figures from 2014 point to a worsening trend in comparison goods provision as there are now 11 fewer comparison goods units and 660 sqm less comparison goods floorspace across the town centre. This has included the closure of the Burtons in the Riverside Shopping Centre and Dorothy Perkins on Bridge Street. The national trend for the proportion of comparison goods units in town centres has also seen a similar proportionate decrease.

The comparison goods provision is generally provided within small units. The Home Bargains unit in the Riverside Shopping Centre measuring 1,010sqm is the only comparison goods unit of a size which is over 500 sqm gross. Some 60 (78%) comparison goods units in the town centre are smaller than 250 sqm, while 29 (48%) retailers occupy units of 100sqm or less.

In terms of the type of comparison goods sold, 14 units are occupied by clothing and footwear retailers, 11 by charity shops, 9 antiques and/or gift shops, 8 phone shops, 6 units occupied by chemists or those selling toiletries, cosmetics & beauty products. Other units are occupied by a variety of retailers including those selling household goods, jewellery, bridal wear, sports goods, computer games, electronics and books. Whilst the proportion of charity shops in the town centre (4.2%) is above the UK average (2.7%) the provision is not considered to materially detract from the vitality and viability of the centre.

Overall, for its size the comparison goods offer in Evesham Town Centre is considered to be reasonably poor and has seen a weakening in the last 4 years.

Retail Services

Evesham Town Centre currently has 36 retail service units (14% of the total) comprising 8% of the total retail and leisure floorspace in the centre. The retail service provision is comparable to the national average. Since 2014, the number of retail service units in Evesham Town Centre has increased by four units (from 32 to 36), and the floorspace has seen a marginal increase from 3,340 to 3,400 sqm. This increase reflects the national trend where the average proportion of retail service units in centres across the country has increased by a percentage point.

The retail service units are mainly small in size with all but seven being smaller than 150 sqm. The units are generally well spread throughout the town centre, although there is a concentration of units at the western end of Bridge Street and in the Riverside Shopping Centre, where 8 units are located in close proximity to each other. There is a high representation of health and beauty providers in the town centre which account for 25 of the 37 retail service units. In addition, there are four opticians, three travel agents, two undertakers, a Post Office and a dry cleaners.

Leisure Services

Overall, 22% of town centre floorspace (9,850 sqm) across 20% of the units (53) are used for leisure services, compared with the national averages of 25% and 24% respectively. Whilst the town centres leisure service offer has improved since 2014, the restaurant/food and drink offer serving the evening economy is relatively limited and would benefit from improvements.

Overall, the town centre contains 19 restaurants and cafes and coffee shops, 11 public houses and bars, 4 betting offices, 4 sports & leisure facilities, a nightclub, casino and 2 club halls.

With the exception of Market Place, leisure service units are primarily located towards the edges of the main shopping area, with concentrations at Merstow Green, at the eastern end of Bridge Street and north along High Street. To the east of Workman Bridge it is noted that there are an additional 23 leisure service units, providing 3,500 sqm of floorspace. This area provides 7 restaurants, 8 fast food & take away units, a snooker bar, solarium, betting office, a hall and The Regal, a small independently run cinema.

Financial and Business Services

Despite the general trend of banks/building societies closing premises in town centres, since 2014 Evesham has retained all of its major banks/building societies. The town centre provides 9 major high street banks/building societies, alongside 9 estate agencies, 4 accountants and financial advisors, 3 solicitors and 2 insurance offices. Overall, for its size, the town centre is considered to provide a good level of financial and business services.

Markets

Evesham Town Centre hosts regular street markets every Tuesday and Saturday along High Street and in Market Square. A range of goods are sold including clothing, household goods, homeware, collectables and fresh produce. LSD Promotions took over the operation of the market in 2017 and have expanded the offer from its previous 11 stalls.

Non-Retail/Commercial Units

In addition to the retail, commercial and leisure units identified above, the town centre also accommodates several churches and places of worship, a library, numerous offices, a dental surgery, veterinary surgery and an advice centre. These uses attract people to the town centre, contributing to its vitality and viability. There are some pockets of residential dwellings on the edges of the town centre, notably on Bridge Street next to the river, along Oat Street and on Mill Street, and again, help to contribute to activity within the town centre outside of commercial trading hours.

Events

Regular events held in Evesham include the annual Asparagus Festival, the National Morris Weekend, River and Plum Festivals and springtime Blossom tours.

Operator Requirements

The 'Requirements List' identifies that there are currently just 6 retail and leisure operators seeking premises within Evesham. The operators seeking space in the town are shown in Figure 6. Whilst Aldi have identified a requirement, we understand that relates to a longer-term aspiration for a foodstore in the north of the town which is unlikely to be realised before 2025.

Figure 6: Operator Requirements

Name	Min Size (sq m)	Max Size (sq m)
Retail/Services		
Aldi	1,765	
Care UK	3716	
Heron Foods	232	465
Leisure – Food & Drink		
Triple Two	93	186
KFC	167	325
Amber Taverns	186	

Rents on Non-Domestic Property

A review of online sources indicates that rents for available commercial units vary across the town centre. Units within the Riverside Shopping Centre are available at between £9.65 and £10.30 per sq.ft, whilst rents along Vine Street and High Street are typically between £15.50 and £16.60 per sq ft. The highest rent within the town centre we found was £28.93 per sq.ft for a unit on Bridge Street. Lower rents in the Riverside Shopping Centre are likely a reflection on the current health of the shopping centre and lack of desirability compared to Vine Street and High Street that attract more footfall.

In general, rents in Evesham Town Centre are lower than those in Worcester but are generally in line with rents in Droitwich and Great Malvern.

Vacancies

There are a total of 43 vacant retail and service units across Evesham Town Centre, accounting for 16% of all units. This is significantly higher than the national average of 11%. The vacant units occupy 6,240sqm of floorspace, which is 14% of the total town centre floorspace, again, higher than the national average of 10%. Although the number of vacancies is high, the situation has improved to some extent since 2014, when there were 50 vacant units, accounting for 17% of all floorspace.

Whilst vacant units can be found throughout the town centre, there is a particular concentration within the Riverside Shopping Centre where a total of 13 of the 36 available units are presently empty (36%). There are further 9 vacant units along High Street, and 6 on Bridge Street. The vacant units, particularly within the Riverside Shopping Centre and at 41-43 High Street, detract from the vitality and viability of the centre.



Photograph 7: Unit under alteration at 8 High Street

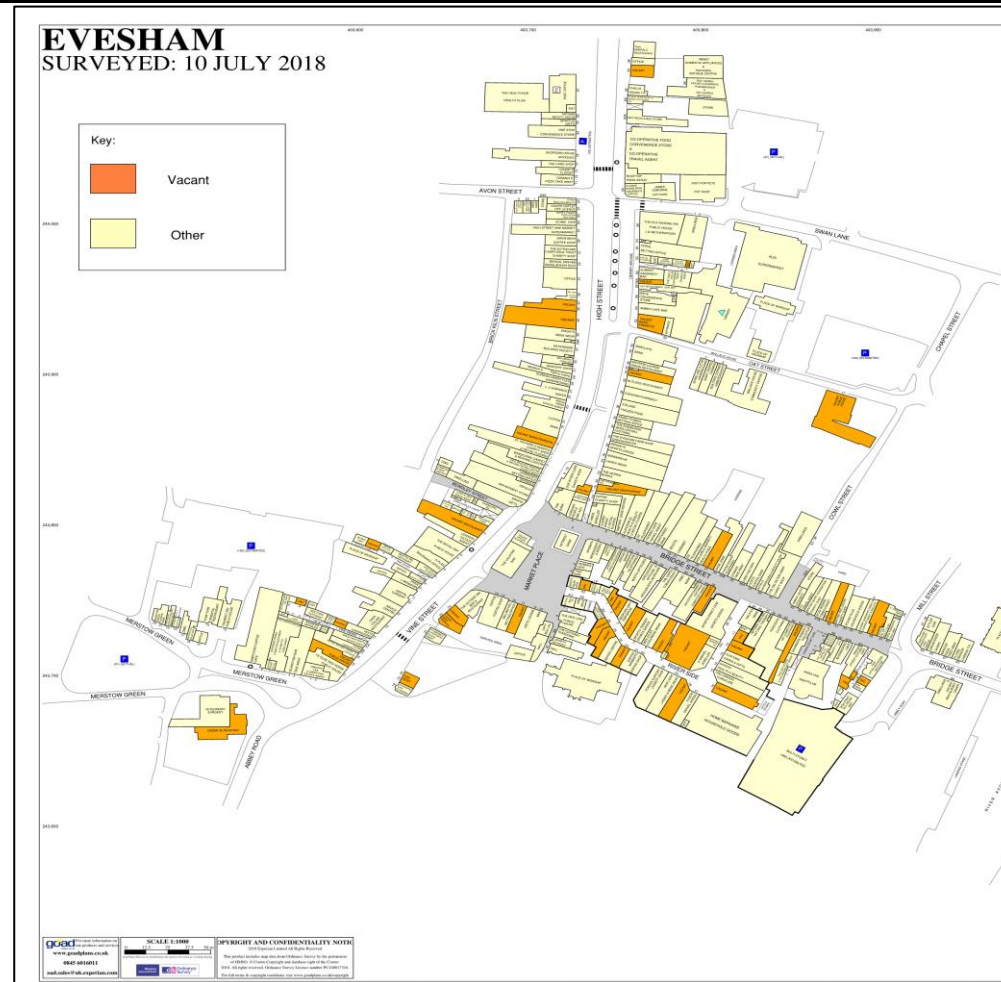


Photograph 8: Vacant unit within the Riverside Shopping Centre



Photograph 9: 41-43 High Street

Vacancies



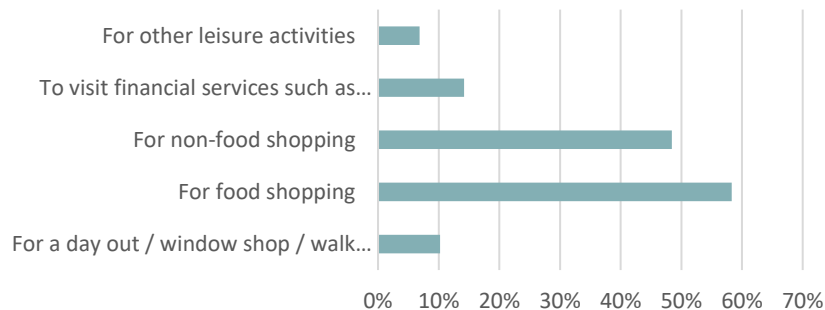
Customers' Views and Behaviour

Using data from the NEMS household survey, we have been able to identify behaviour and the main reasons why respondents visit Evesham Town Centre, what they like about it and what, if anything, would encourage them to visit the centre more often.

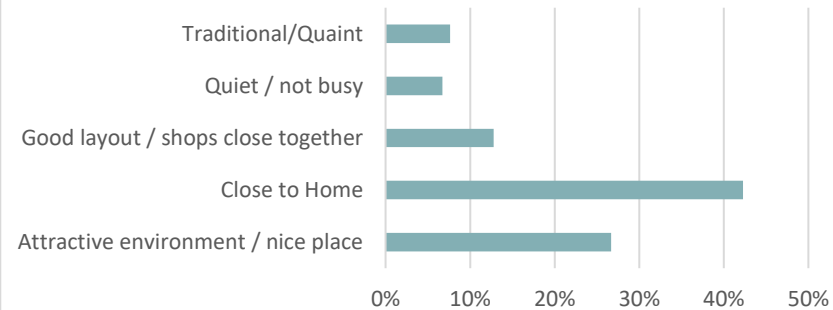
Of those who visit Evesham, 10% visit the town centre on a daily basis, 52% visit at least once or twice a week, and 28% visit at least once or twice a month. In relation to how people travel to the town centre, 70% of visitors arrive in a car or van and 22% of visitors walk to the town centre. Only 3% of visitors arrive into the town centre by public transport and 4% arrive by taxi, no respondents indicated that they cycled to the town centre.

Food and non-food shopping provided the main reasons why people visit Evesham Town Centre. Other common reasons include visiting financial services, visiting for a day out, window shop or a walk about, to undertake other leisure activities.

Main reasons people visit Evesham Town Centre

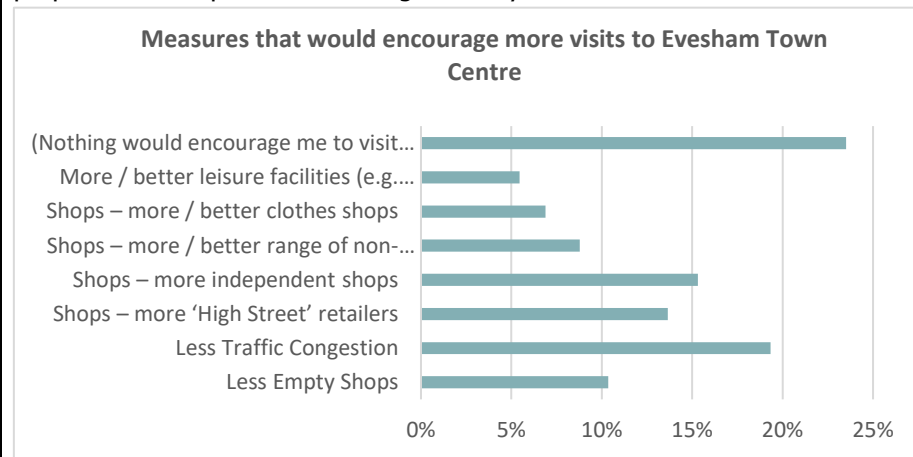


Main reasons people like Evesham Town Centre



42% of respondents indicated that they liked Evesham because it is close to their home, other common answers when asked what they liked about the town centre included that it was a nice place or provided an attractive environment, was traditional/quaint, and that it is quiet/ not busy.

Less traffic congestion (27%) was the most common answer when people were asked what would encourage them to visit the town centre more often. Other common answers included more 'high street' retailers, more independent shops, less empty shops, more or better clothes shops, and more or better leisure facilities. It is notable that out of the seven City/Town Centres in South Worcestershire, the lowest proportion of respondents in Evesham (24%) indicated that nothing would encourage them to visits the Town Centre more often. This response usually indicates a general satisfaction with the Town Centre, so a lower proportion of responses indicating this may show lower levels of satisfaction with Evesham Town Centre compared with others.



Pedestrian Flows

During our visits, the centre was observed to be reasonably busy. Good levels of activity were observed along High Street, particularly from the junction of Oat Street south, towards Market Square. Bridge Street also showed reasonably good levels of activity, particularly close to High Street but activity levels diminished towards the eastern boundary of the town centre. The Riverside Shopping Centre was also observed as being particularly quiet which correlates to the large number of vacant units at this location.

Pedestrian counts undertaken in 2016 to support a town centre report by People & Places showed that the busiest location surveyed within the town centre was Market Square. In line with common shopping behaviours, most activity was recorded on Saturdays with at least twice the number of people recorded than on weekdays.

Accessibility

The accessibility of the centre is determined by the ease and convenience of access by a choice of means of travel, including that which is provided to pedestrians, cyclists and disabled people, and the ease of access from the main arrival points to the principle attractions in the centre.

Road Access

Evesham Town Centre is considered to be well connected to the surrounding area including the major settlements of Worcester via the A44, Tewkesbury and Stratford-upon-Avon. The town centre benefits from being well connected to the strategic highway network with the M5 within 20km driving distance on the A46(T) to the south, and the M42 within 35 km along the A46(T) to the north of the town centre.

Direct vehicular access is available to much of Evesham Town Centre's retail core, although Bridge Street is partially pedestrianised and inaccessible to cars during the hours of 10.30 to 16.30 Monday to Saturday. There is a busy road network running through Evesham and we have observed that the High Street is susceptible to congestion, particularly during afternoon hours and when local schools finish. Access to and from the town centre by car is also difficult at these times with significant traffic experienced at the crossing of the River Avon to the south of the town centre, at the junction of Pershore Road and Cheltenham Road. We understand that Worcestershire County Council is presently working on a Evesham Transport Strategy which aims to deliver several infrastructure schemes that can be delivered in the short term to help ease traffic flows in and around the town.

We note that the NEMS household survey identified that 27% of respondents would be encouraged to visit Evesham Town Centre more often if there were less traffic congestion / better access.

Car Parking

There are several car parks in and around Evesham Town Centre including at the Riverside Shopping Centre (259 spaces), Merstow Green (91 spaces), Bewdley Street (86 spaces) and Oat Street (151 Spaces). In addition to these car parks, there are several short-stay parking spaces, offering free parking for up to an hour along Vine Street and outside the Post Office on High Street.

The level of car parking in the town centre is considered to be reasonably good for the size of centre. This is reinforced by a study by the consultancy 'People & Places' that found that 37% of car park spaces in the town centre were available during busy periods.



Public Transport

Evesham has a railway station operated by First Great Western located approximately 0.5km to the north of the town centre. Direct trains can be caught to London Paddington, Hereford and Worcester. We consider the linkage and signage between the railway station and town centre core would benefit from improvements. The town centre is also reasonably well served by buses with national, regional and frequent local services available from stops on High Street, however, the NEMS household survey indicates that only a small proportion of respondents travel to the town centre by bus.

Walking, Cycling and Disabled Access

Access for pedestrians and cyclists within Evesham is generally good, helped by relatively flat topography and wide pavements, particularly along High Street. The partial pedestrianisation of Bridge Street allows for convenient access to the Riverside Shopping Centre for pedestrians and the close proximity of the railway station to the town centre is considered an advantage. Notwithstanding this, access is hindered by the busy roads running through the centre and limited number of crossing points. Seating opportunities are provided in various locations, although along Bridge Street, where the narrowness of the road may be a limiting factor, we noted that there were limited benches available.

Cycle parking is available at several points throughout the town centre including in Market Square, Bridge Street, Vine Street and along High Street. At the time of our visits, the cycle parking was not particularly well used.

The town centre is considered to provide good disabled accessibility, again assisted by the partial pedestrianisation of Bridge Street and relatively flat topography within the town centre. In addition, free and unlimited car parking is available for disabled users in each council operated car parks and a number of on-street locations closer to the shops, have dedicated disabled car parking spaces.

Perception of Safety and Occurrence of Crime

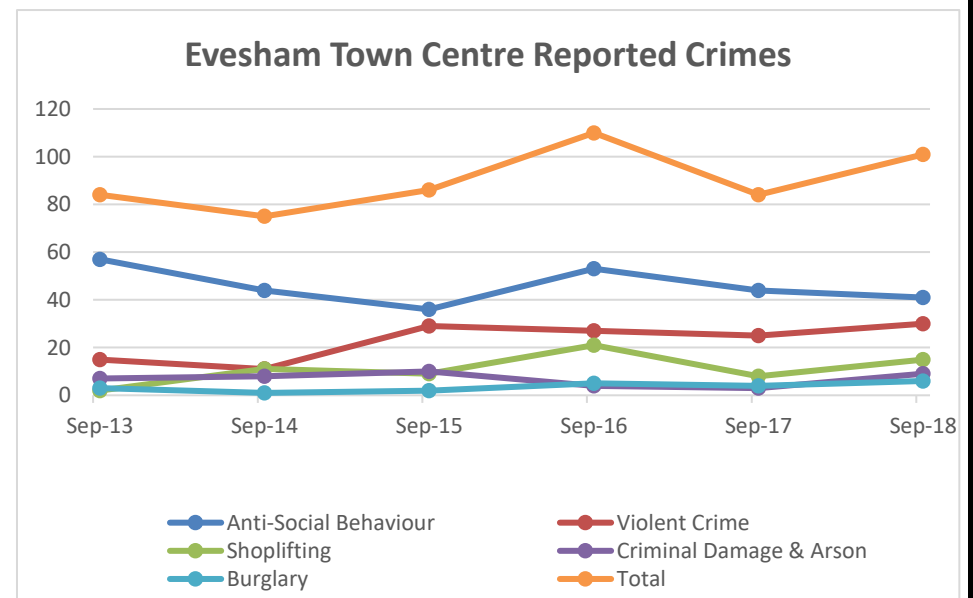
Evesham Town Centre generally feels safe and secure. High Street and Bridge Street, the main shopping areas, have sufficiently high levels of pedestrian activity during the daytime and, for the most part, have active retail frontages that provide natural surveillance within the streets. Wychavon District Council operate a network of 10 CCTV cameras across the town centre which are supplemented by privately operated CCTV systems and assist police by enabling them to react to incidents and provide evidence for prosecutions.

A study of crime statistics in the town centre show that reports of five common crimes have varied over the past 5 years with a broadly increasing trend visible. In September 2013 84 crimes were reported, increasing to 110 in September 2016 and falling slightly to 101 in September 2018.

Incidences of anti-social behaviour have consistently been the most commonly reported crime in Evesham followed by reports of violent crime. The number of reports of shoplifting, burglary, and criminal damage & arson have been broadly similar, apart from in September 2016 when there was a spike in reported shoplifting offences.

It is noted that most crimes over the past year have been reported near to the junction of Bridge Street and Mill Street, at the eastern edge of the town centre. This is an area with a nightclub, bar and a casino, with several fast food takeaway establishments nearby and it is likely that groups of people will congregate late at night.

Within the household survey no respondents said that better safety or security in the town centre would encourage them to visit Evesham more often, indicating that crime is generally not perceived to be an issue.





Town Centre Environmental Quality

Evesham is an attractive riverside town. The entirety of the town centre falls within Evesham Conservation Area and benefits from numerous historic buildings of high-architectural quality that are well preserved. Buildings of particular note within the town centre are The Roundhouse (NatWest Bank), the Town Hall and Abbot Reginald's Gateway at Market Place, and The Old Red Horse Inn and The Almonry at the south of Vine Street.

Generally, the environmental quality of the town centre is considered to be good. Areas such as Market Place are well laid out, separate from traffic with attractive planting and with outdoor seating. In some places, however, and especially along Bridge Street, the public realm would benefit from improvement/modernisation with higher quality materials, more seating opportunities and better landscaping. At the time of our visits, we did not observe much litter or graffiti but at various points along the eastern side of High Street we observed quantities of building waste that had been left in public areas which detracted from the appearance of the surroundings.

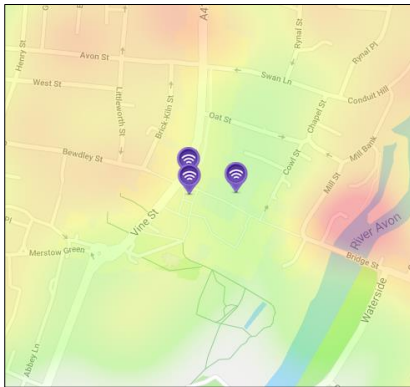
Some of the vacant units in the centre are clearly in need of investment and appear unsightly. This is especially apparent at the former Argos unit at 41-43 High Street which is particularly untidy and has clearly lain vacant for some time. Not all the vacant units are unsightly however and we noted efforts made in Riverside Shopping Centre to improve the appearance of units with colourful vinyl displays. Units elsewhere in the town centre may benefit from this approach.

The congested road running through Evesham also has a negative impact on parts of the town centre around High Street, where the busy traffic is noisy and limits pedestrian connectivity.

Overall, whilst the town centre is generally attractive, some investment is needed to ensure the environmental quality is maintained.

Digital Facilities in Evesham Town Centre

BT Wi-Fi Hotspots



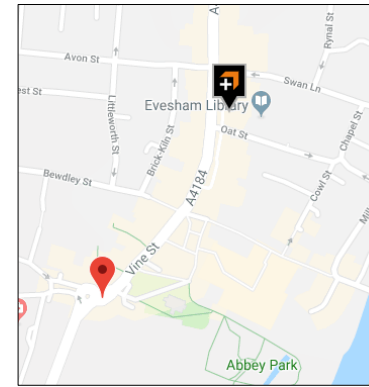
Source: www.btwifi.co.uk/find/

Sky Cloud Wi-Fi Hotspots



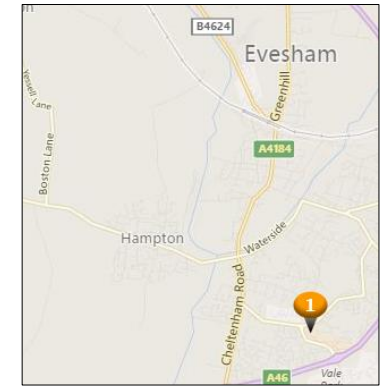
Source: www.thecloud.net/free-wifi/find-a-hotspot/

Collect+ Locations



Source: www.collectplus.co.uk/store_locator/

Amazon Locker Locations



Source: amazon.co.uk

Developing a 'bricks & clicks' environment can benefit a town centre by attracting additional visitors and bringing a further layer of interaction through the promotion of events and advertising. BT and The Cloud (now Sky) are identified by the ATCM (Association of Town & City Management) as providing the most commonly offered free Wi-Fi hotspots within town centres, while Collect + and Amazon commonly provide town centre facilities where customers can collect items that they have ordered from online retailers.

There are three BT primary hotspots and eight Sky Cloud hotspots reasonably evenly distributed throughout the town centre. Evesham presently provides one Collect + location at Excel News in the north of the town centre but there are no Amazon Lockers. The nearest Amazon Lockers to the town centre are located at the Morrisons supermarket off Springfield Drive, 2km to the south east of the town centre.

Overall, the town centre appears to be reasonably well served by free-wifi provision but not particularly well catered for in terms of collect+ and Amazon parcel drop off/pick up points.



Conclusions

Overall, the town centre is considered to display reasonable levels of vitality and viability. Having regard to our vitality and viability health check assessment, including feedback from key stakeholders, we consider that the principal strengths, weaknesses, opportunities and threats to the centre are as follows

Strengths and Opportunities

- Provides a number of attractive and well-preserved historic buildings.
- Good financial and business service offer, with all major banks present.
- Direct access to the strategic highway network.
- Compact and walkable main shopping area.
- Good public transport connections with bus stops located directly adjacent to the main retail area and the railway station.
- The introduction of intelligent car park boards.
- Road improvements to reduce congestion.
- 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.

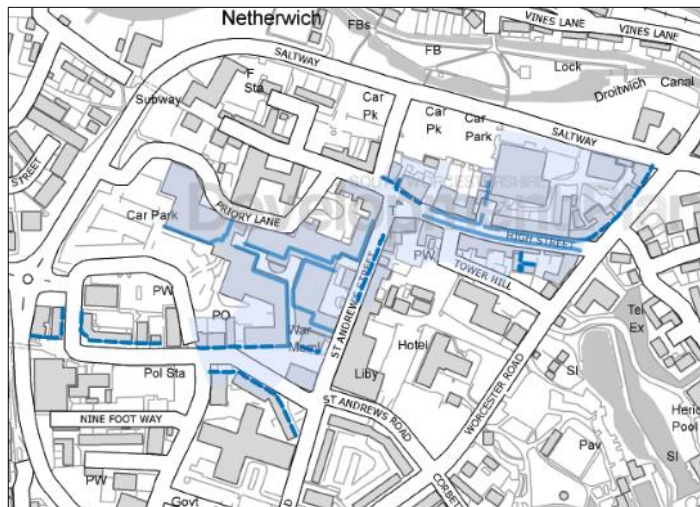
Weaknesses and Threats

- The vacancy rate is well above the national average and is particularly high within the Riverside Shopping Centre.
- The comparison goods sector is not particularly strong and has weakened over the past 5 years.
- The centre provides a high proportion of smaller units, which may not meet modern retailer requirements.
- The town centre car park are not very convenient for shoppers.
- The local highway network can often become congested, particularly at busy periods of the day.
- Potential further out-of-centre retail/leisure development which isn't well connected to the centre could weaken the comparison goods sector further.

Droitwich Town Centre Health Check Appraisal

Droitwich Spa and Evesham are the largest towns in Wychavon District. Droitwich is located to the north west of the district, the town lies 11km (driving distance) to the north of Worcester and is also well located to the nearby towns of Bromsgrove (10km to the north), Kidderminster (20km to the west) and Redditch (20km to the east).

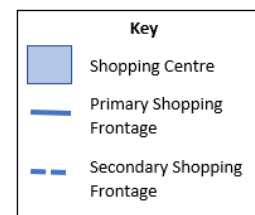
Droitwich Town Centre covers the commercial core of the town encompassing units along Ombersley Street, Victoria Square, St Andrews Street and the High Street. Included within this area is St Andrews Square Shopping Centre, Morrisons Supermarket and the Waitrose Store located off the B4090, Saltway. The primary shopping area runs along High Street and covers St Andrew's Square Shopping Centre and the Morrisons Store. The secondary shopping area covers Ombersley Street, the end of the High Street and some of St Andrew's Street.



Source: South Worcestershire Development Plan (2016)

Figure 1: Key Facilities Located in the Town Centre

National Operators	Total
Key Anchor Store: Morrisons, Waitrose, Wilkinson Other National Operators: Argos, Boots, The Carphone Warehouse, The Works, W H Smith	34
Community Facilities	
Droitwich Medical Centre, St Andrews Church, Norbury Theatre, Heritage & Information Centre, Library	5



Photographs of Droitwich Town Centre



Photograph 1: Victoria Square



Photograph 2: Entrance to St Andrews Square from St Andrews Street.



Photograph 3: Lloyds Bank at Victoria Square



Photograph 4: View along High Street



Photograph 5: Public Art at St Andrews Square



Photograph 6 : Entrance to St Andrews Square from Covercroft/Morrisons

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Diversity of Main Town Centre Uses

Figure 2: Number of Units in Droitwich Town Centre (2015)

Category	No	%	UK Av (%)
Convenience	18	11	9
Comparison	53	32	32
Retail Service	30	18	14
Leisure Services	33	20	23
Financial and Business Services	17	10	11
Vacant	14	8	11
Total	165	100	100

Source: Experian

Figure 4: Number of Units in Droitwich Town Centre (2019)

Category	No.	%	UK Av (%)
Convenience	18	11	9
Comparison	47	28	30
Retail Service	31	18	15
Leisure Services	36	21	24
Financial and Business Services	18	11	10
Vacant	18	11	11
Total	168	100	100

Source: Experian

Figure 3: Floorspace in Droitwich Town Centre (2015)

Category	Sq.m	%	UK Av (%)
Convenience	6,950	23	15
Comparison	10,870	35	36
Retail Service	2,670	9	8
Leisure Services	4,110	13	23
Financial and Business Services	2,490	8	8
Vacant	3,710	12	9
Total	30,800	100	100

Source: Experian

Figure 5: Floorspace in Droitwich Town Centre (2019)

Category	Sq.m	%	UK Av (%)
Convenience	6,690	21	15
Comparison	10,420	33	35
Retail Service	3,100	10	7
Leisure Services	4,950	16	25
Financial and Business Services	2,590	8	8
Vacant	4,150	13	10
Total	31,900	100	100

Source: Experian

Diversity of Main Town Centre Uses

Droitwich currently has 168 retail and leisure units within the town centre providing 31,900 sqm of floorspace. The commercial/leisure provision has increased slightly from October 2015 when there were 165 units providing 30,800 sqm of floorspace. This is resultant from the reconfiguration of some units across the town centre, including the conversion of 4-7 Queen Street from offices to a Gym.

Droitwich Town Centre accommodates 6 of the 31 'Major Retailers' identified by Experian as major attractors to town centres. Given the size of the town centre and its proximity to the Worcester City Centre we consider this to be a reasonable representation. Overall, 37 of the 168 operators within the town centre are national multiple operators, which include 4 convenience operators, 17 comparison goods units, 4 retail service units, 5 leisure service units and 8 financial and business service units. Accordingly, the majority (78%) of units in the town centre are occupied by independent retailers.

Convenience Goods Units

There are currently 18 convenience units which account for 11% of the total number of units and occupy 21% of the floorspace in Droitwich. The proportion of convenience goods floorspace in the town centre (21%) is significantly higher than the national average (15%) and is clearly influenced by the large Morrisons and Waitrose foodstores. Of the remaining convenience units, there are 6 bakers and confectioners, 2 international food shops, 2 butchers, a health food shop, an off-licence, a confectionary, newsagent and tobacconist, and a general convenience store.

Holland & Barrett and Thornton's are the only other national convenience multiples aside from Morrisons and Waitrose with the remainder of the convenience units operated by local or otherwise independent retailers.

Comparison Goods Units

We observed 47 comparison goods units in Droitwich Town Centre in January 2019. The comparison goods units are predominantly concentrated in St Andrew's Square and at the western end of High Street. St Andrew's Square contains most of the national multiple comparison shops, including Peacocks, Boots, M&CO, WH Smith, Wilko, Argos, The Carphone Warehouse and Card Factory. Indeed, the only national multiple retailer outside of this area is Just for Pets which occupies a store on the edge of the town centre off Salt Way, opposite Waitrose.

Compared with October 2015, both the number of comparison units and the proportion of floorspace for such uses has fallen in the town centre, dropping from 53 to 47 units (32% to 28%), and from 10,870 sqm to 10,420 sqm (35% to 33%). The decline in the number of comparison goods units (-6) should be carefully monitored as any further decrease could potentially impact on the attractiveness of the town centre to existing and potentially new comparison goods retailers.



In terms of the comparison goods offered in Droitwich, 9 units sell clothes & accessories or footwear, 8 are charity shops and 7 units provide furniture, carpets & flooring or DIY & home improvement goods. Other units are occupied by florists, card shops, phone shops and book shops amongst others. The proportion of charity shops within the town centre (4.7%) is very slightly above the national average (4.2%), however we do not consider this to detract from the vitality or viability of the town centre.

Retail Services

Droitwich Town Centre is well represented in terms of its retail service units. There are currently 31 units within this sector, comprising 18% of the total number and 10% of the total floorspace. The retail service provision is higher than the national average of 15% of units and 7% of floorspace which was also the case in October 2015, when again 18% of units and 9% of floorspace was given to such use.

In general, the retail service units are mainly small sized with 26 of the units being between 30 sqm and 150 sqm. There are no real concentrations of retail service units in the town centre, although by proportion, there are fewer retail service providers at St Andrew's Square compared with the rest of the town centre. The town centre has a high representation of health and beauty providers, which account for 21 of its 31 retail service units. In addition, there are also five opticians, two travel agencies, a photography studio, a post office, dry cleaners & laundrette and an undertaker.

The retail service offer has 3 national operators, Boots opticians, Specsavers and TUI travel agency. Overall, for its size, Droitwich is considered to provide a good level of retail services.

Leisure Services

There are 36 leisure service units within the town centre which represents 18% of the total number of units. The leisure service units occupy 4,950 sqm of floorspace (16% of the total across the centre). The current proportion of leisure service units is below the national average (21%) whilst in terms of the proportion of floorspace is significantly below the national average (25%). Notwithstanding this, the survey shows that the proportion of leisure units within the town centre has increased by two units since 2015 with both the proportion of units and floorspace increasing.

There are three main areas where leisure uses are most concentrated, the east of High Street (11 units), Queen Street (5 units) and at Ombersley St/Coleman Road (7 units). Units located on High Street include 5 fast food takeaway units, 4 cafes, an Indian restaurant, and a tanning salon. Queen Street accommodates 3 fast food takeaways, another Indian restaurant, a café and a gym. Ombersley St and Coleman Road accommodates 3 takeaway units, a Chinese restaurant, a Subway sandwich shop, a betting office and a public house. Overall, the town centre contains 12 fast food takeaways, 11 restaurants and cafes, four public houses, four sports & leisure facilities and two betting offices.

For a town the size of Droitwich, we consider there to be a under-representation of facilities to cater for the night time and evening economy. Although there are 2 additional public houses and a small volunteer run theatre/cinema on friar street, just outside of the town centre boundary, which provide additional leisure services, there is still an under provision within the town.

Financial and Business Services

18 units provide financial & business services in the town centre, an increase in one unit from 2015. The proportion of financial and building service units and floorspace in Droitwich is in line with the national average in terms of both the proportion of units and floorspace. The financial and business service units are concentrated at Victoria Square where 10 of the units are located. Overall, the town centre accommodates seven estate agencies, four banks and building societies, three accountants/financial advisors, two employment agencies, a solicitor and a printing firm.

Markets

Droitwich Town Centre formerly hosted a weekly charter market in Victoria Square but this was discontinued in 2018 when the operator retired.

Non-Retail/Commercial Units

In addition to the retail and leisure uses identified above, the town centre also accommodates a number of other uses. These include a library and information centre, a tourist office, medical centre, community centre and two places of worship. Though not included within the designated town centre boundary, Norbury House, located opposite the Morrisons store contains 96 residential flats alongside the theatre and cinema space. These additional uses in, or close to, the town centre, help to provide activity outside of normal shopping periods and contribute to the overall vitality and viability of Droitwich.

Events

Annual events that take place in Droitwich include the Food & Drink Festival, Chateau Impney Hill Climb, St Richards Canal Festival and the Salt Festival.

Operator Requirements

The 'Requirements List' identifies a total of six retail and leisure operators currently seeking premises in the Droitwich. For its size, Droitwich is considered to have a reasonable number of operator requirements.

Figure 6: Operator Requirements

Name	Min Size (sq m)	Max Size (sq m)
Retail/Services		
Savers	139	279
Tool Station	260	557
Heron Foods	232	465
Cats Protection (South West & Central)	74	279
Lidl	929	2787
Leisure – Food & Drink		
KFC	167	325



Rents on Non-Domestic Property

There is was only limited data relating to commercial rents available online at the time of this appraisal. Our review of online sources suggests that commercial rents on available commercial units vary in the town centre between £14.22 and £23.84 per sqft. This is broadly comparable to Great Malvern and Evesham where rents are similar, but rents in Droitwich Town Centre are less than those in Worcester City Centre.

Vacancies

There are 18 vacant units within Droitwich Town Centre (11% in total), which is identical to the national average. In floorspace terms however, the vacancy rate is two percentage points higher than average, with 4,150 sqm of vacant floorspace (13% of the total) across the town centre. This is mainly due to the vacant Raven Hotel on St Andrew's St which extends to 2,410 sqm, more than half of the vacant floorspace in Droitwich. The remaining vacant units are small in size, with only one other unit above 150 sqm, the former Spinning Wheel Bar at 240 sqm, again on St Andrew's Street.

The largest concentration of vacant units are in St Andrews Street, where the aforementioned Raven Hotel and former Spinning Wheel Bar are located, along with five other vacant units. Three of these are at the St Andrews Street secondary entrance to the St Andrew's Square shopping precinct. The units do not benefit from a prominent frontage and there was monitored to be low pedestrian footfall.

Planning permission and listed building consent was granted for the redevelopment of the Raven Hotel and its grounds in 2013 and again October 2018. Should this be implemented, the hotel and its grounds would be redeveloped to provide 51 dwellings and 906 sqm (GIA) of A3/A4 commercial floorspace. The re-occupation of the building for non-retail/leisure uses would significantly contribute to the vitality and viability of the town centre.

Vacancies

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SURVEYED: JANUARY 2019



Photograph 7: Vacant unit at no. 6 St Andrew's Square



Photograph 9: Vacant unit on High Street

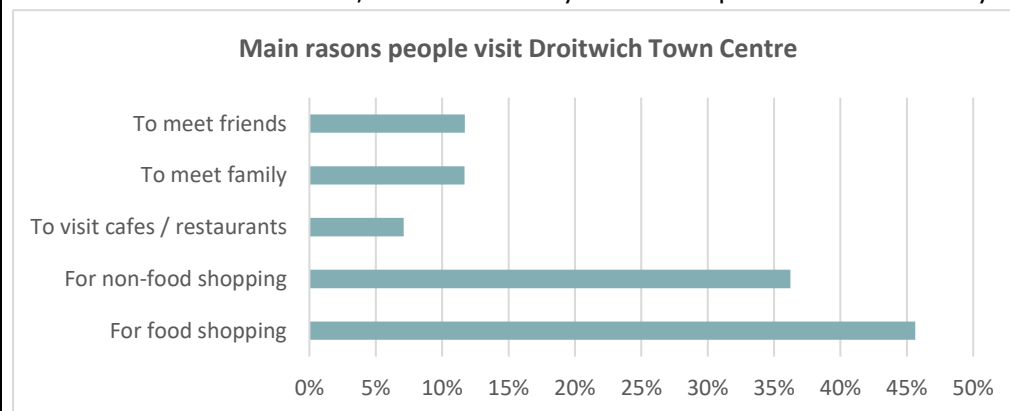


Photograph 8: Vacant units at walkthrough from St Andrew's St to St Andrew's Square

Customers' Views and Behaviour

Using data from the NEMS household survey, we have been able to identify the main reasons how and why respondents visit Droitwich Town Centre, what they like about it and what, if anything would encourage them to visit the centre more often.

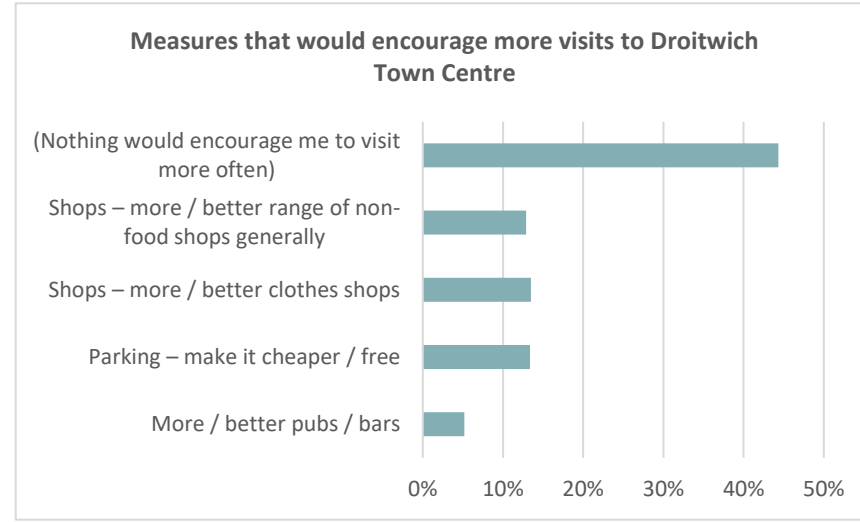
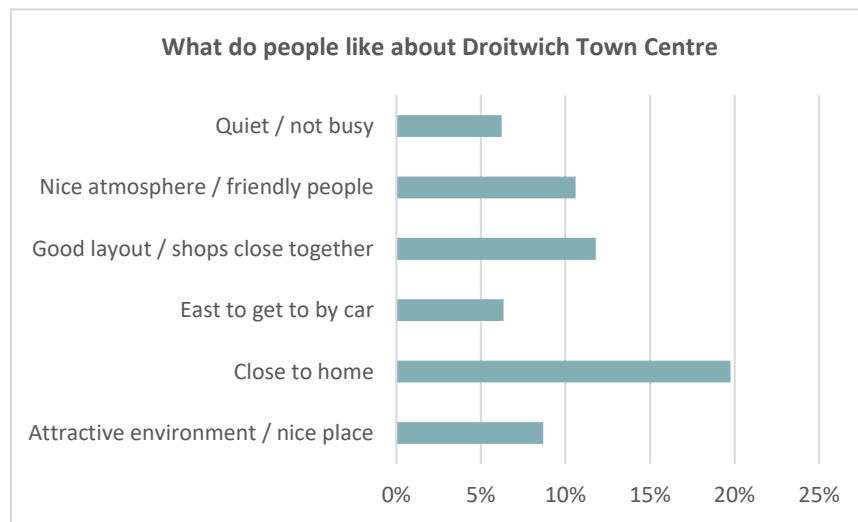
Of those who visit Droitwich, 23% indicated that they visited the town centre every day, 44% visit at least once or twice a week, 13% visit once or twice a month, and 14% of respondents indicate that they visit at least every three months. In terms of how people travel into Droitwich Town Centre, 78% travel by car or van, 14% walk to the town centre, and 6% travel by bus. No respondents to the survey indicated that they used the train.



Food and non-food shopping provided the main reasons why people visit Droitwich Town Centre. Other common reasons include meeting friends, meeting family and visiting cafes and restaurants.

20% of respondents indicated that they liked the town centre because it is close to their homes, other common answers included that it had a good layout with shops close together, was friendly or provided a nice atmosphere, had an attractive environment, and that it was easy to get to by car.

When asked what would encourage them to visit the town centre more often, the most common measures included making parking cheaper or free, providing a better range of non-food shops generally, more clothes shops, and more or a better range of pubs and bars. 44% of respondents indicated that nothing would encourage them to visit the Droitwich more regularly suggesting they are generally satisfied with the Town Centre.



Pedestrian Flows

Footfall was observed to vary significantly across the town centre. At St Andrews Square and Victoria Square high levels of footfall were observed with a lot of activity around the Morrisons supermarket and good levels of pedestrian activity outside Waitrose and the walkthrough to the High Street. We observed that Queen Street was quiet at the time of our visit and that St Andrew's Street, including the entrance from here to St Andrew's square was also very quiet. This correlates to the number of vacancies at this location and with pedestrian counts undertaken as part of the 2018 People & Places town centre report.

Accessibility

The accessibility of the centre is determined by the ease and convenience of access by a choice of means of travel, including that which is provided to pedestrians, cyclists and disabled people, and the ease of access from the main arrival points to the principle attractions in the centre.

Road Access

Droitwich Town Centre is well connected by road, being 4km (driving distance) south from Junction 5 of the M5 motorway, and approximately 11km north of Worcester City Centre. The A38 connects Droitwich to Bromsgrove to the north, and Worcester to the south, while the M5 motorway provides connections to destinations further afield such as Birmingham, Gloucester, Cheltenham and further south to Bristol.

In terms of the local highway network, Droitwich Town Centre is effectively encircled by the Saltway arcing around the town centre to the west, and Worcester Road to the east, forming an inner ring road of sorts. This provides direct access to much of the centre by car, although High Street and St Andrew's Street are partially restricted with a one-way system. St Andrew's and Victoria Squares are the only parts of the town centre that are pedestrianised.

Car Parking

For the size of the Town Centre, there is a good level of car parking provision within Droitwich, with car parks available at Covercroft, outside Morrisons (370 spaces), at Ricketts Lane (102 spaces) and High Street, outside Waitrose and Pets at Home (198 spaces). Each of these car parks carry charges from 08:00-18:00 Monday to Saturday, but they are free outside of these times and on Sundays. A very limited amount of free on-street parking is available on High Street, however this is limited to a stay time of 45 minutes. 13% of respondents to the household survey indicated they would be more likely to visit the Town Centre if parking was cheaper or if it was free, although we note that a study undertaken by People & Places in July 2018 showed that 53% of parking spaces were typically available across the Town Centre on busy days.

Public Transport

Droitwich has a railway station located approximately 0.5km to the west of the Town Centre. The station provides services to Worcester, Bromsgrove, Kidderminster and to Birmingham, and also provides services further afield to London Marylebone, Manchester and to Edinburgh via Leeds. Although it is relatively close to the Town Centre, there is currently not a clear pedestrian route connecting the main shopping area to the station and improvements could be made here. Bus stops located at Victoria Square, Ombersley Road and outside Waitrose on Saltway provide local and regional bus services to Worcester, Bromsgrove and the surrounding area.



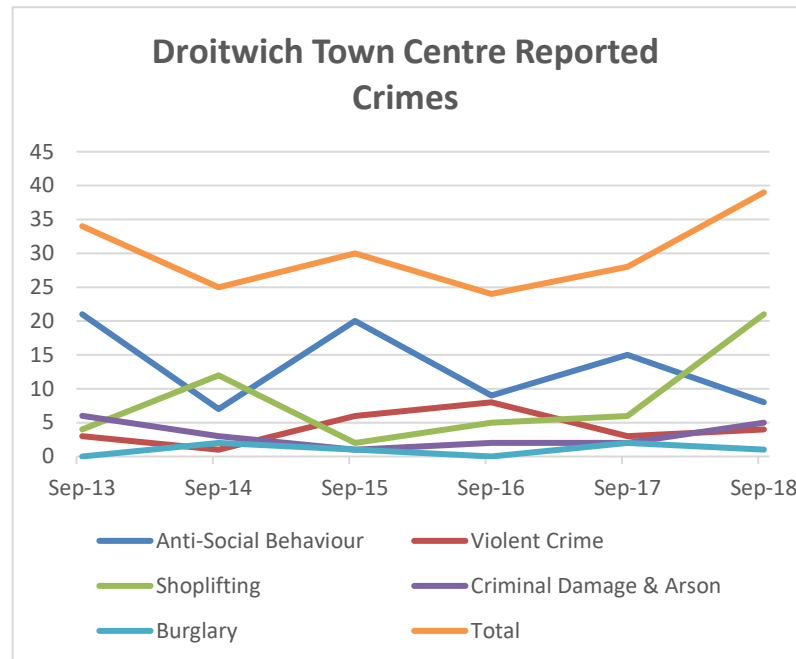
Walking, Cycling and Disabled Access

Access for pedestrians across the Town Centre is generally good owing to the relatively compact size. St Andrews Square is fully pedestrianised and easy to navigate and Victoria Square and Ombersley Street have wide, uncluttered walkways. Pedestrian access along High Street is less convenient owing to the narrow pavements either side of the road. Pedestrian connectivity is good across the centre and walkways are conveniently located allowing easy access to and from St Andrew's square, from High Street to Waitrose, and from the end of Ombersley Street underneath the Saltway.

In terms of cycling, Droitwich is located on National Cycle Route 45 which runs through the centre along Ombersley Street, St Andrews Street and High Street, connecting Droitwich with Worcester and north along the Severn Valley to Shropshire. On our visits to the centre, we noted that limited cycle parking was available outside Morrisons, Waitrose and in St Andrew's Square.

The town is considered to be generally good in terms of accessibility for the disabled, however as noted above, the narrow pavements along High Street may impede access to those in wheelchairs and mobility scooters.

Perception of Safety and Occurrence of Crime



Droitwich generally feels safe during the daytime, particularly in the main shopping areas, although some less busy areas, such as the underpass at Saltway/Ombersley Road and the entrance to St Andrews Square off St Andrew's Street, feel isolated. Wychavon District Council operate a network of 8 CCTV cameras across the Town Centre to assist police by enabling them to react to incidents and provide evidence in prosecutions.

A study of crime statistics shows that the reported crime rate for five common crimes within the Town Centre has varied over the past five years. In September 2013 there were a total of 34 reported incidences of Anti-social behaviour, violence, shoplifting, criminal damage, arson and burglary within the Town Centre. This figure fell to 24 incidents in September 2016, and then rose again to 39 in September 2018.

When compared with other towns in Wychavon, such as Evesham Town Centre, the crime rate in Droitwich is reasonably low. Whilst there will be a number of factors that influence this, the lower provision of 'evening economy' outlets in Droitwich may be a reason, resulting in less congregations of people in the Town Centre at night.

Town Centre Environmental Quality

The environmental quality of Droitwich is generally good and it is clear in some locations, such as Victoria Square and St Andrew's Square, that investment has been made to improve the public realm. Other areas of the Town Centre, such as Ombersley Street could, however, benefit from improvement.

The main shopping area at St Andrews Square provides a pleasant pedestrian shopping environment that is generally well maintained and easy to navigate. The area has been enhanced through the use of public art in some locations, the planting of trees and the use of high-quality street furniture. Similarly, Victoria Square and the area outside the library and Citizens Advice Bureau is an attractive pedestrianised area with plenty of seating available, interpretive display panels, public art and planting. Several high-quality buildings such as the Lloyds Bank and St Richards House provide an attractive backdrop to the square.

The walkway from St Andrew's Street to St Andrew's Square detracts significantly from this area as there are a number of vacant units here and pedestrian footfall is low. The conspicuous use of barbed wire to prevent access to the flat roof of this entry point and the lack of lighting makes it dark and unwelcoming.

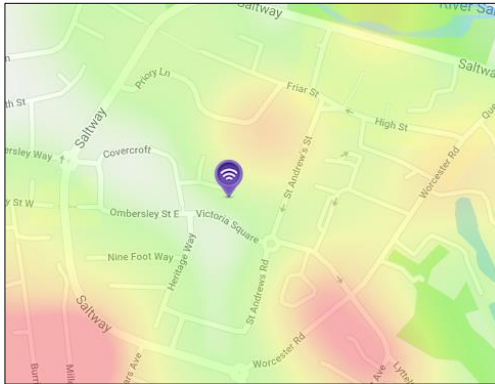
Much of the Town Centre is covered by the Droitwich Spa Conservation Area with only St Andrew's Square and the Omberlsey Street falling outside of the boundary. There is a concentration of listed buildings along High Street where rows of buildings of various styles and sizes provide on either side of the road provide an attractive streetscape. One or two vacant units along here are scruffy and in need of some attention and the use of whitewashing on empty shopfronts detracts from the appearance of these buildings. Whilst the Raven Hotel is an attractive building it is looking tiered and its vacancy does not positively contribute to the environmental quality of the Town Centre. Its refurbishment and re-occupation by an active user would significantly benefit this part of the Town Centre.

Ombersley Street to the south-west of the Town Centre is another area that could benefit from some improvement. It is characterised by parades of c1930s retail units set back from the road with little in the way of enhancements to the public realm. Additional seating and planting here may help to improve dwell time and improve this pedestrian 'gateway' to the Town Centre from west of Droitwich.

On the whole, Droitwich Town Centre is attractive and has clearly benefitted from investment over recent years, however, some areas could clearly benefit from further improvement.

Digital Facilities in Droitwich Town Centre

BT Wi-Fi Hotspots



Source: www.btwifi.co.uk/find/

Sky Cloud Wi-Fi Hotspots



Source: www.sky.com/wifi/hotspotfinder

Collect+ Locations



Source: www.collectplus.co.uk/store_locator/

Amazon Locker Locations



Source: amazon.co.uk

Developing a 'bricks & clicks' environment can benefit a town centre by attracting additional visitors and bringing a further layer of interaction through the promotion of events and advertising. BT and The Cloud (provided by Sky) provide the most commonly offered free Wi-Fi hotspots within town centres, while Collect + and Amazon provide town centre facilities where customers can collect items that they have ordered from online retailers

The Wi-Fi coverage across Droitwich Town Centre is poor with only one BT primary hotspot and no Sky Cloud Wi-Fi hotspots. The Town Centre provides one Collect + location at Saver Express on Ombersley Street and Amazon Lockers are available at the Morrisons store.

Overall, digital facilities in Droitwich Town Centre are considered to be poor and would benefit from enhancements/improvements.

Conclusions

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

Strengths and Opportunities

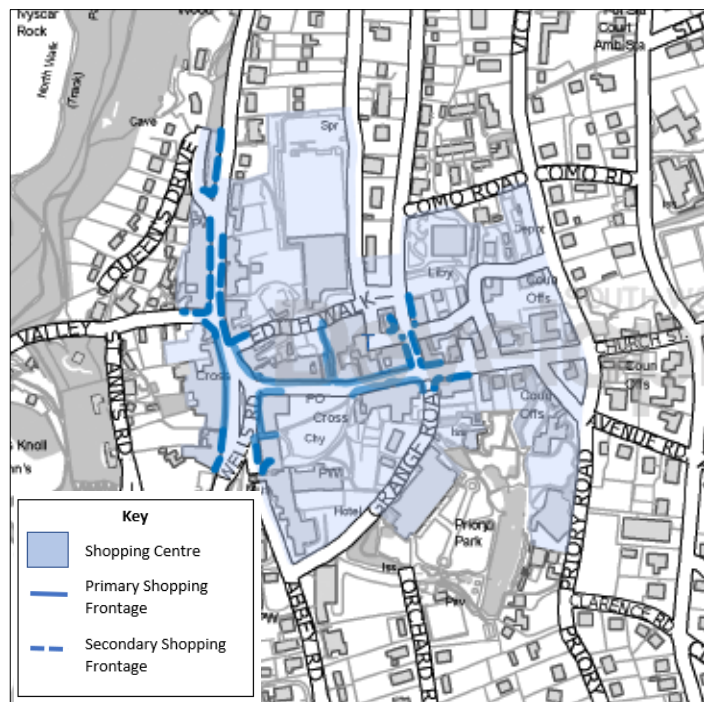
- Droitwich Town Centre is generally accessible by all modes of travel which is aided by flat topography and good parking provision.
- The Town Centre is well provided for in terms of financial and business services.
- The Town Centre has a strong convenience goods provision.
- The high street is attractive, and St Andrews Square and Victoria Square provide good quality shopping environments.
- There is a low overall crime rate across the Town Centre.
- Redevelopment at the Raven Hotel will help to revitalise this area of the Town Centre.

Weaknesses and Threats

- There is an under-provision of leisure services in the Town Centre, especially those serving the 'evening economy'.
- The railway station is not well linked to the Town Centre
- The centre has seen a decline in the number of units which will need to be carefully monitored as any further decrease could potentially impact on the attractiveness of the town centre to existing and potentially new comparison goods retailers.
- Digital facilities in the town centre are considered to be poor.
- Some areas such as Ombersley Road and St Andrews Street would benefit from additional investment.
- The vacant Raven Hotel does not contribute to the vitality and viability of the centre. Its longstanding vacancy suggests it may not be attractive to investors which may result in the former hotel remaining vacant for the foreseeable future.
- The proximity of Worcester and its nearby retail parks provides significant competition to the town centre, limiting its appeal to higher profile retailers.
- The visibility/marketing of the town centre is considered to be poor.

Great Malvern Town Centre Health Check Appraisal

Great Malvern is by far the largest of the three South Worcestershire Development Plan designated town centres in Malvern Hills District, the town centre is in close proximity to two significant District Shopping centres at Malvern Link and Barnards Green. Located at the foot of the Malvern Hills and within the wider settlement of Malvern, the centre is approximately 15km (driving distance) from Worcester to the north. Great Malvern is very popular tourist destination with St Ann's Well, Priory Park, The Priory, Abbey Gateway and the Malvern Hills Area of Outstanding Natural Beauty itself being key attractors.



Source: South Worcestershire Development Plan (2016)

The town centre, as designated on the South Worcestershire Development Plan (SWDP) Policies Map, extends west along Church Street to Bellvue Terrace and Worcester Road. The town centre boundary encompasses the Waitrose supermarket off Edith Walk and extends south to include Malvern Splash Leisure Complex and the Malvern Theatre.

The designated primary shopping frontage extends along the western end of Church Street to its juncture with Wells Road/Bellevue Terrace. The secondary shopping frontages are along Worcester Road to the north, and along the southern end of Graham Road where it joins with Church St.

The key retail, service and leisure units and facilities located in the town centre are set out in Figure 1 below.

Figure 1: Key Facilities Located in the Town Centre

National Operators	Total
Key Anchors: Waitrose, Malvern Theatres Other National Operators include: Clarks, Fat Face, Mountain Warehouse, W H Smith, Boots, Wilko, Prezzo, Ask Italian	27
Community Facilities	
Great Malvern Priory, Malvern Museum of Local History, Post Office, Tourist Information Office, Malvern Theatre, Malvern Splash Leisure Centre	6

Photographs of Great Malvern Town Centre



Photograph 1: View along Church Street



Photograph 2: Mac & Jac's Café, Wells Road



Photograph 3: Waitrose supermarket viewed from the footpath to Worcester Rd.



Photograph 4: Shops at the corner of Graham Rd and Church St

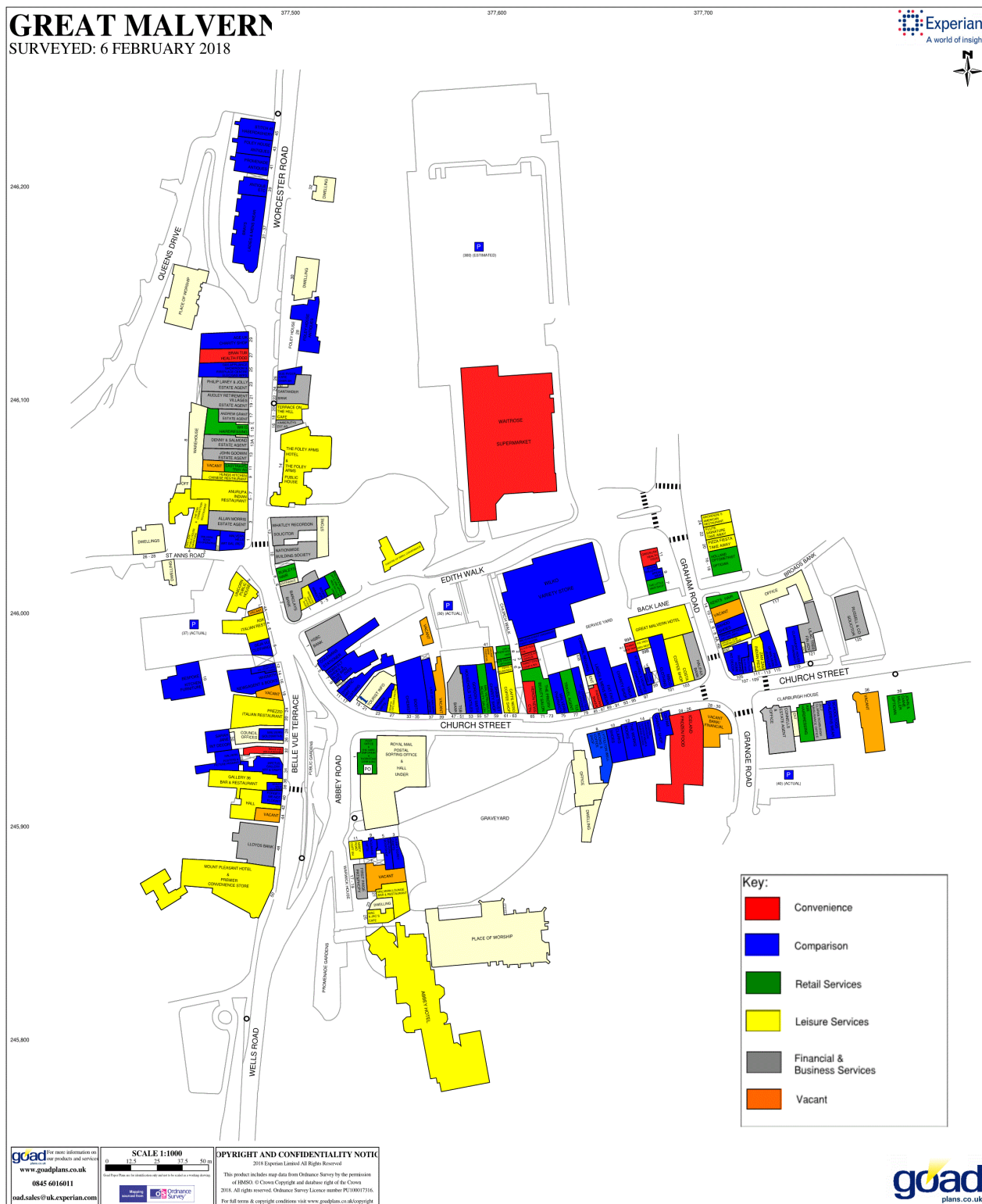


Photograph 5: Great Malvern Priory



Photograph 6: View towards Wells Road from Bellevue Terrace

Diversity of Main Town Centre Uses



Diversity of Main Town Centre Uses

Figure 2: Number of Units in Great Malvern Town Centre (2015)

Category	No.	%	UK Av. %
Convenience	12	8	9
Comparison	62	41	32
Retail Service	14	9	14
Leisure Services	33	22	23
Financial and Business Services	24	16	11
Vacant	8	5	11
Total	153	100	100

Source: Experian

Figure 4: Number of Units Great Malvern Town Centre (2018)

Category	No.	%	UK Av. %
Convenience	13	9	9
Comparison	57	38	30
Retail Service	15	10	15
Leisure Services	34	23	24
Financial and Business Services	20	13	10
Vacant	10	7	11
Total	149	100	100

Source: Experian

Figure 3: Floorspace in Great Malvern Town Centre (2015)

Category	Sq.m	%	UK Av. %
Convenience	3,820	14	15
Comparison	8,590	32	35
Retail Service	1,260	5	7
Leisure Services	7,800	29	25
Financial and Business Services	3,780	14	8
Vacant	1,330	5	10
Total	26,580	100	100

Source: Experian

Figure 5: Floorspace in Great Malvern Town Centre (2018)

Category	Sq.m	%	UK Av. %
Convenience	3,910	15	15
Comparison	8,360	32	35
Retail Service	1,430	6	7
Leisure Services	8,140	31	25
Financial and Business Services	3,240	12	8
Vacant	890	3	10
Total	25,970	100	100

Source: Experian

Diversity of Main Town Centre Uses

Great Malvern Town Centre provides a total of 149 retail and leisure units, representing a slight decrease from 2015 when 153 units were recorded. In terms of the amount of retail service and leisure floorspace within the centre, the overall level of floorspace (including vacant units) has also decreased, from 26,580 sqm in 2015, to 25,970 sqm. We note that several previously vacant units within the town centre have been converted to dwellings and other non-retail and service uses since 2015, which accounts for this change.

Convenience Goods Units

There are currently 13 convenience units within Great Malvern (9% of the total) occupying 3,910 sqm of floorspace (15% of all floorspace in the centre). The proportion of units and floorspace is in line with the UK average. Since 2015, the convenience provision has increased by 1 unit, and by 90 sqm. The convenience goods offer includes 4 bakers & confectioners, 3 convenience/newsagent stores, 2 health food shops, 2 foodstores /frozen food specialist, and a delicatessen. Waitrose occupies the largest convenience unit in the town centre and acts as an important anchor store. Frozen food specialist, Iceland, are also present in the town centre. All of the other convenience units are small in size at between 30 to 150 sqm floorspace. In addition to Waitrose and Iceland, Thorntons and Premier Stores are the other national convenience goods retailers present in the town centre. The remaining stores are run by independent operators.

Overall, the number of convenience units has remained stable over the last 4 years with the town centre providing a good level of provision for a town of this size.

Comparison Goods Units

There is 8,360 sqm of comparison goods floorspace across 57 units in Great Malvern, accounting for 38% of the total units and 33% of the total floorspace across the town centre. The proportion of comparison retail units in the town centre is above the UK average of 30%, but the proportion of floorspace in comparison use is below the national average of 35%. Figures from 2015 indicate a slight weakening in comparison goods provision as there are now 5 fewer comparison goods units and 230 sqm less comparison goods floorspace across the town centre.

The comparison goods provision is generally provided within small units. Wilko, located off Church walk, and Brays Department store, located on Worcester Road are the only units of a size which is over 400 sqm gross. Some 53 comparison goods units in the town centre are smaller than 250 sqm, while 22 retailers occupy units of 100sqm or less.

National operators in Great Malvern include Fat Face, Mountain Warehouse, Wilko, The Works, Boots, M&CO, Clarks and W H Smith. The majority of comparison goods retailers are occupied by independent retailers including Brays department store, which has been in the town centre for over 100 years, and a number of antique stores/art galleries.



In terms of the type of comparison goods sold, 13 units are occupied by clothing and footwear retailers, 6 by charity shops, 7 by antiques and art shops, 5 by booksellers and 4 by gift shops. Other units are occupied by a variety of different operators including florists, mobile phone shops, jewellers, those selling toiletries, cosmetics & beauty products, and furniture retailers.

Overall, the town centre is considered to provide an attractive independent offering catering for both the local and visitor economy. However, as demonstrated by the household survey findings Worcester has an influence on comparison goods shopping patterns in the Malvern area. Given the location of Worcester and its far superior national multiple comparison goods offering this is not particularly surprising.

Retail Services

The town centre currently provides 15 retail service units (10% of the total) comprising 6% of the total retail and leisure floorspace in the centre. The retail service provision is below the national average both for the proportion of units (15% UK average) and for the proportion of floorspace (7% average). The retail service provision in the town centre has broadly remained the same since 2015.

The retail service units are mainly small in size with all being smaller than 180 sqm. The units are generally well spread throughout the town centre, although most are located away from the primary shopping frontages. 8 of the 15 retail service units are occupied by health and beauty providers and in addition to these, there are 4 opticians, 2 travel agents and a Post Office.

Leisure Services

Primarily due to the number of hotels in the town centre, the survey identifies that, in floorspace terms, the town centre provides a significantly higher proportion of leisure service than the UK average (31% compared to 25%). However, in terms of proportion of units, the number in leisure service use is comparable to the UK average. Leisure service provision has largely remained unchanged since 2015.

It is considered that Great Malvern provides a good variety of leisure services in the town centre, serving both the daytime and evening economies. The centre accommodates 9 cafes, 9 restaurants, 7 public houses, hotels & guesthouses, 2 clubs, a small theatre and a health club. In addition to the leisure units covered in the Experian Goad survey, the town centre is also served by the large Malvern Theatre (also incorporating a cinema) on Grange Road, and the Malvern Splash Leisure Complex. Both of these facilities are key attractors to the town and positively contribute to the vitality and viability of the town centre.

Overall, the leisure service provision in Great Malvern is considered to be good, serving both a local and tourist role.

Financial and Business Services

The financial and business service sector in Great Malvern is considered to be healthy, with a higher than UK average proportion of units (13%) and floorspace (12%) occupied by service providers across the centre. The town centre provides 7 major high street banks and building societies in addition to 8 estate agencies, 2 solicitors, an insurance office, a financial advisory service and a printing company.

Markets

Malvern Town Centre hosts regular markets throughout the year on Abbey Street including a farmer's market held on the third Saturday of each month and an arts market held on the last Saturday of each month. In addition, various seasonal markets are held at less regular intervals throughout the year.

Non-Retail/Commercial Units

As noted previously the town centre is significant tourist attractor and provides a number of key attractors beyond retail and leisure uses. Important attractors include St Ann's Well, Priory Park, The Priory, Abbey Gateway, and Malvern Museum. In addition to these facilities, a number of offices are located within or on the edge of the town centre and the District Council office is located to the north of the town centre which is also acts an important footfall generator during the week.

In terms of residential uses, several residential apartments on the upper storeys of shop units along Bellevue Terrace, Worcester Road and Church Street contribute to activity and vibrancy in the town centre outside of traditional shopping hours.

Events

Several annual events take place in Great Malvern including the Well Dressing and Water Festival, Autumn in Malvern Festival, Malvern in Bloom, Summerfest and 'Christmas on King'. Other nearby events include the Malvern Walking Festival across the Malvern Hills and regular shows, festivals and events held at the Three Counties Showground 5km from Great Malvern Town Centre.

Operator Requirements

The 'Requirements List' identifies that there are currently 4 national retailers seeking premises within Great Malvern. The operators seeking space in the town are shown in the table below.

Figure 6: Operator Requirements

Name	Min Size (sq m)	Max Size (sq m)
Retail/Services		
Aldi	1,765	
Savers	139	279
Tool Station	260	557
Heron Foods	232	465

Source: 'The Requirements List'



Rents on Non-Domestic Property

There is was only limited data relating to commercial rents available online at the time of this appraisal. Our review of this information suggests that available commercial units in Droitwich Town Centre command rents between £13.32 and £23.53 per sq.ft. This is broadly similar to rents in Droitwich and Evesham, but lower than those in Worcester City Centre.

Vacancies

There are a total of 10 vacant retail and service units across Great Malvern, accounting for 7% of all units across the town centre. The vacant units occupy 890 sqm, just 3% of the total town centre floorspace. Both in terms of the proportion of units and of floorspace, the vacancy rates across the town centre are significantly below the national average. Whilst the number of vacant units in the town centre has increased by two since 2015, the level of vacant floorspace has reduced. The low level of vacant units indicates a good demand for units in the town centre.

The vacant units are dispersed throughout the town centre with no real concentration that notably detracts from the town centres vitality and viability.

Vacancies

GREAT MALVERN

SURVEYED: 6 FEBRUARY 2018

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Customers' Views and Behaviour

Main reasons people visit Great Malvern Town Centre



Using data from the NEMS household survey, we have been able to identify the main reasons how and why respondents visit Great Malvern Town Centre, what they like about it and what, if anything would encourage them to visit the centre more often.

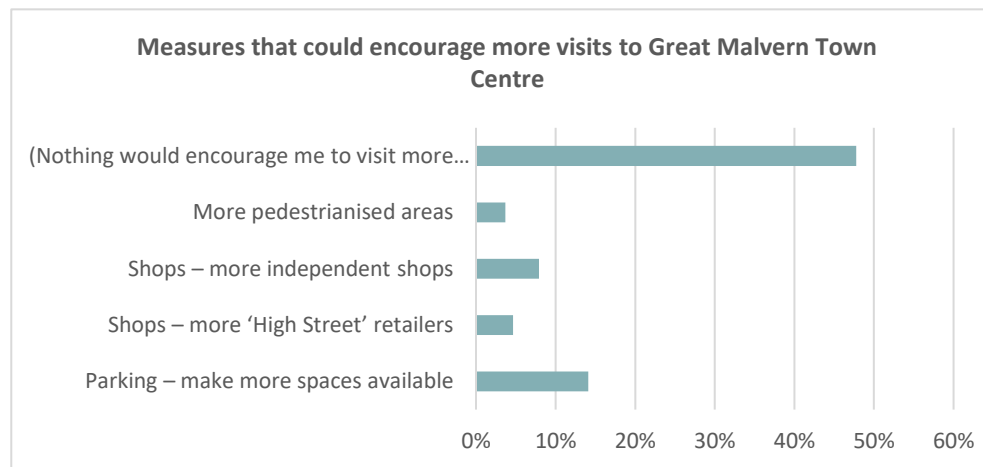
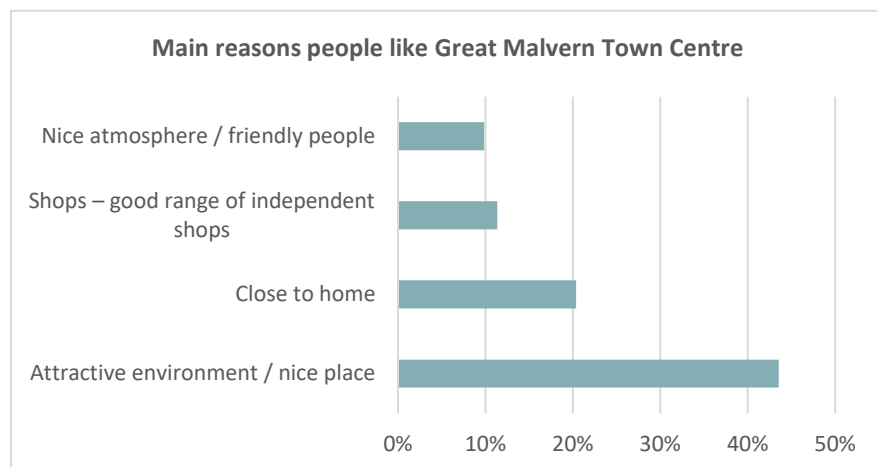
Of those who visit Great Malvern, 6% visit the town centre on a daily basis, 51% visit at least once or twice a week, and 25% visit at least once or twice a month. In relation to how people travel to the town centre, 80% of visitors arrive in a car or van and 10% of visitors walk to the town centre. 7% of visitors arrive into the town centre by bus, no respondents indicated that they cycled to the town centre or took the train.

Food and non-food shopping provided the main reasons why people visit the town centre. Other common reasons include visiting for a day out, window shop or a walk

about, to undertake other leisure activities, and to visit financial services.

44% of respondents indicated that they liked Great Malvern because it provides an attractive environment. Other common things that people liked are that the town centre is close to home (20%), provides a good range of shops (11%) and that it has a nice atmosphere /friendly people.

Making more parking spaces available was the most common measure suggested to encourage more people into the centre of Great Malvern. Other measures suggested were to introduce more pedestrianised areas, more independent shops, and more 'high street' retailers. Notably however, 48% of respondents said that no particular measures would encourage them to visit more often, indicating that they were satisfied the town centre.



Pedestrian Flows

Given that Great Malvern is a tourist destination, footfall within the town centre will vary throughout the year and be busier during the summer months and during holiday periods. At the time of our visits, good levels of pedestrian footfall were observed across Great Malvern Town Centre. The main shopping area at the junction of Church Street and Bellevue Terrace/Worcester Road was particularly busy, as was the pedestrian cut-through from Church Street, past Wilko to Waitrose. Fewer pedestrians were observed on Church Street to the south of the Grange Road junction however, and away from the main shopping areas along Grange Road and Priory Road, very little activity was observed at the time of our visits.

Accessibility

Road Access

In terms of driving distances, Worcester is the city to Great Malvern lying approximately 15km to the north east along the A449. Ledbury is 13.5km to the south west of the town along the A449 while Tewkesbury lies approximately 23km to the south east and Evesham 34km to the east. Great Malvern is connected to the strategic highway network with the M5 within 15km driving distance to the north east, and Junction 2 of the M50 17km to the south. Direct vehicular access is available to much of Malvern Town Centre's retail core, although the steep and narrow streets hinder access for larger vehicles somewhat.

Car Parking

The largest car park in the town centre is at Waitrose (circa 300 spaces), where 3 hours of free parking is offered. Another good-sized car park off Priors Road to the south of the centre provides circa 175 spaces, however the other car parks in the centre are small in size. Some on street parking is provided in the town centre but this is limited to short stays but several nearby streets outside the Town Centre do accommodate some additional free on-road parking. At the time of our visits, there appeared to be very few parking spaces available across the town centre. Responses to the household survey support this, and as identified above, the most commonly suggested measure to attract people to the town centre more often was to make more car parking spaces available.

Public Transport

Great Malvern railway station is located approximately 0.6km from the town centre, off Avenue Road. Direct trains run to Birmingham New Street, London Paddington, Hereford, Bristol and Southampton. The town centre is also served by busses which run to Hereford, Ledbury and Worcester as well as more local stops. Busses are available from stops on Graham Road and east along Church Road.

Accessibility

Walking, Cycling and Disabled Access

Although the town centre is relatively compact, the topography of Malvern means that some pavements are narrow and very steep which may present difficulties for those with mobility problems or those with pushchairs or heavy shopping. Additionally, direct access to certain areas of the town centre (such as 3-11 Abbey Road and the route from the Waitrose car park to Worcester Road) is only available via steps without a long detour, which again may prove an obstacle for disabled or older people.

In terms of cycle parking, only limited spaces are available in the town centre. We anticipate that this is primarily due to the limited pavement widths in the centre.



Photograph 7: Western end of Church Street



Photograph 8: Steeply sloping pavements at Edith Walk/Bellevue Terrace



Photograph 9: View of Waitrose car park from the walkway to Worcester Road

Perception of Safety and Occurrence of Crime

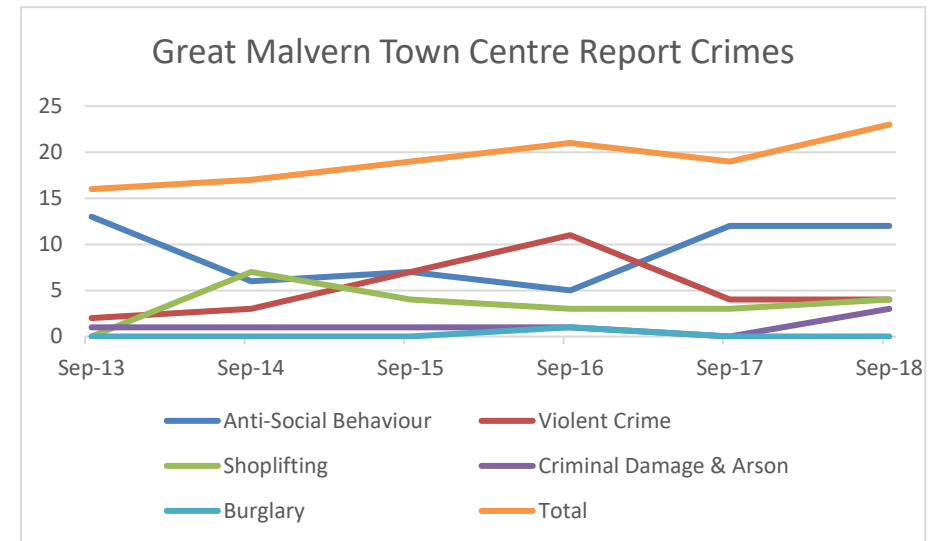
Great Malvern Town Centre provides a generally safe and secure environment. The main shopping streets have sufficiently high levels of pedestrian activity during the daytime and have active retail frontages that provide natural surveillance. At night, some of the more peripheral areas of the town centre may feel less secure as they lack active frontages and have areas of foliage that create isolated areas. These areas include Edith Walk and areas of Priory Park.

A study of crime statistics in the town centre shows that reports of five common crimes have remained relatively stable over the past five years. When combined, the number of reports of anti-social behaviour, violent crime, shoplifting, criminal damage & arson and burglary have varied between 16 incidences reported in September 2013, to 23 in September 2018.

The most commonly reported crimes have varied between anti-social behaviour (September 2013, 2017 and 2018), violent crimes (September 2015) and shoplifting (September 2014).

Statistics show that most crimes over the past year have been reported in Church Road, within the main shopping area.

Overall, given the size of Great Malvern we consider the crime rate to be quite low.





Town Centre Environmental Quality

Great Malvern generally provides a high-quality environment with clean, attractive and well-maintained public areas. The gardens at the top of Church Street/Bellevue Terrace are particularly attractive providing well-tended areas of planting, benches and public art which contribute to a strong sense of place.

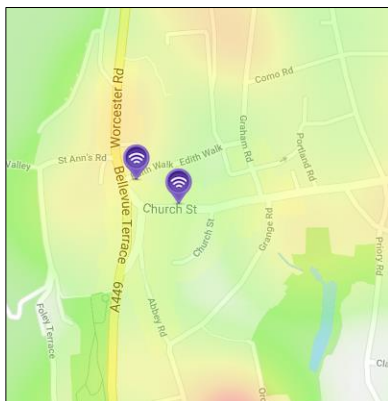
Malvern Priory provides a dramatic backdrop to the town centre and the steep topography of the town allows for wide-reaching views across South Worcestershire from gaps between buildings. We note that Great Malvern has recently received a Gold Award in the Heart of England and the Britain in Bloom competitions and the numerous planters, hanging baskets and flower beds around the town centre add to a feeling of vitality. Several of the buildings in the centre are listed and historical features such as the Victorian gas lamps that are found throughout the town have been well preserved, adding to the distinctive character of the town centre.

Edith Walk, which runs parallel to Church Street is the only area of the town centre where the environmental quality is somewhat lacking. Several small car parks and servicing areas lead off this road and there are no active frontages. Despite this, no litter, graffiti or evidence of vandalism was observed and mature trees and shrubbery along the northern side of the road soften some of the more functional elevations of buildings fronting other roads.

Overall, Great Malvern has very good environmental quality which makes it a pleasant place to visit.

Digital Facilities in Great Malvern Town Centre

BT Wi-Fi Hotspots



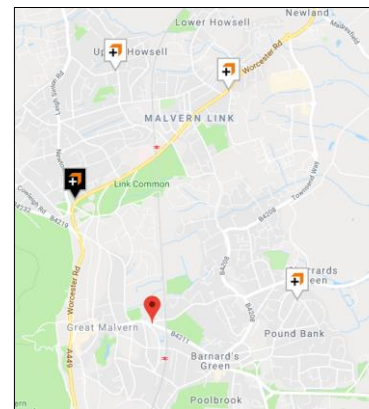
Source: www.btwifi.co.uk/find/

Sky Cloud Wi-Fi Hotspots



Source: www.thecloud.net/free-wifi/find-a-hotspot/

Collect+ Locations



Source: www.collectplus.co.uk/store_locator/

Amazon Locker Locations



Source: amazon.co.uk

Developing a 'bricks & clicks' environment can benefit a town centre by attracting additional visitors and bringing a further layer of interaction through the promotion of events and advertising. BT and The Cloud (now Sky) are identified by the ATCM (Association of Town & City Management) as providing the most commonly offered free Wi-Fi hotspots within town centres, while Collect + and Amazon provide town centre facilities where customers can collect items that they have ordered from online retailers.

There are two BT primary hotspots and three Sky Cloud hotspots within the town centre, a good provision for the size of the town. The hotspots are located at the western end of Church Street in the main shopping area and at the southern end of Worcester Road. No Collect + locations or Amazon Lockers are located in Great Malvern Town Centre. The nearest Collect + point is on Worcester Road, approximately 800m to the north of the town centre and the nearest Amazon Lockers are at the Morrisons store at the Malvern Retail Park, 3km to the north east.

Conclusions

Overall, the town centre is considered to display healthy levels of vitality and viability. Having regard to our vitality and viability health check assessment, including feedback from key stakeholders, we consider that the principal strengths, weaknesses, opportunities and threats to the centre are as follows

Strengths and Opportunities

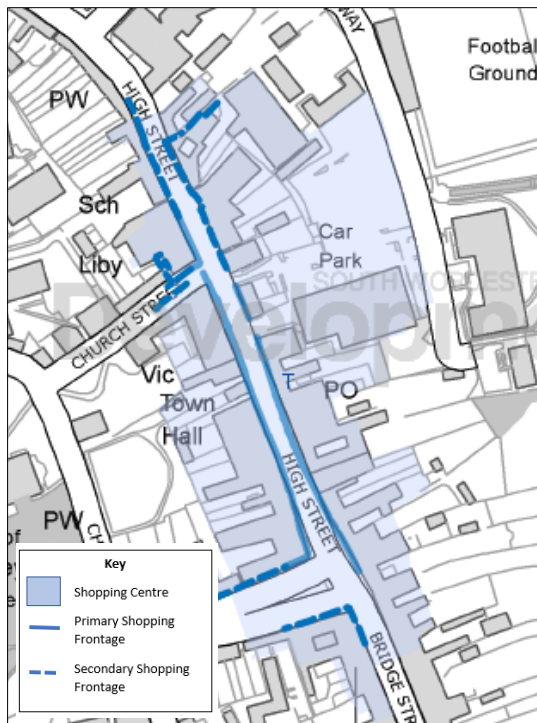
- The Town Centre has an attractive built environment with well-tended public spaces.
- Provides a good leisure offer serving both the daytime and evening economies.
- The centre contains a good financial and business service offer.
- The Town Centre is a popular tourist attraction and provides a number of non-retail and leisure attractors including the theatre complex and the adjacent Area of Outstanding Natural Beauty.
- The centre benefits from numerous annual events.
- The Town Centre provides an attractive independent offering catering for both the local and visitor economy.
- The centre has a low vacancy level.

Weaknesses and Threats

- Steep topography makes access difficult for those with mobility problems.
- Car Parking provision during peak times struggles to meet demands.
- Additional retail and leisure provision at Malvern Shopping Park, Malvern Link and Barnards Green is a potential threat.
- There are no 'Click and Collect' locations in the Town Centre.

Pershore Town Centre Health Check Appraisal

The market town of Pershore, situated to the south of the A44 between Evesham and Worcester, is the smallest town in the Wychavon district with a population of circa 7,100. Situated in a loop of the River Avon, the town is approximately 15km (driving distance) to the south east of Worcester, 10km west of Evesham and 17km north of Tewkesbury.



The town centre, as designated on the South Worcestershire Development Plan (SWDP) Policies Map, primarily extends along High Street to the junction with Bridge Street, and it extends along Broad Street. This boundary encompasses the indoor retail market to the north of the centre, and also the Asda foodstore to the east of High Street.

Wychavon District Council's offices and Pershore Community Hospital are located a short walk to the north of the town centre off High Street whilst Pershore Abbey, a popular visitor attraction, is located to the west off Church Walk. All three are considered to be important footfall generators for the town centre.

The key facilities located in the town centre are set out in Figure 1 below.

Figure 1: Key Facilities Located in the Town Centre

National Operators	Total
Key Anchor: Asda	
Other National Operators: Holland & Barrett, Tesco Express, M&CO, Boots, Savers	6
Community Facilities	
Number 8 Arts Centre, Pershore Sports & Leisure Centre	3

Source: South Worcestershire Development Plan (2016)

Photographs of Pershore Town Centre



Photograph 1: 66-70 High Street



Photograph 2: The Millers Arms Public House



Photograph 3: Entrance to the covered markets



Photograph 4: Asda with Pershore Leisure Centre beyond



Photograph 5: 38-40 High Street

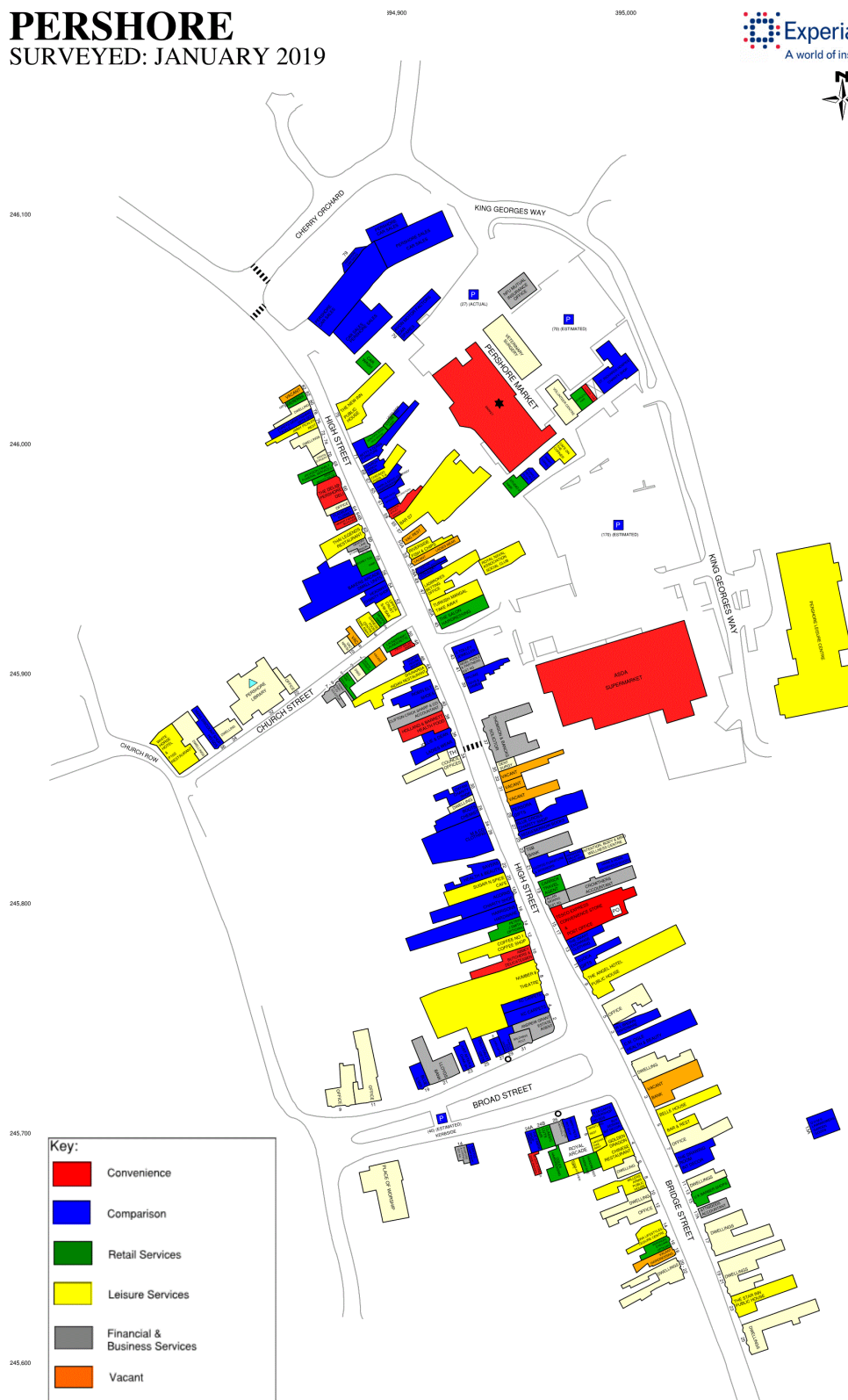


Photograph 5: View of 1-3 High Street

Diversity of Main Town Centre Uses

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Diversity of Main Town Centre Uses

Figure 2: Number of Units in Pershore Town Centre (2014)

Category	No.	%	UK Av. %
Convenience	12	8	8
Comparison	50	34	33
Retail Service	21	14	14
Leisure Services	27	19	22
Financial and Business Services	16	11	11
Vacant	19	13	11
Total	145	100	100

Source: Experian

Figure 4: Number of Units in Pershore Town Centre (2019)

Category	No.	%	UK Av. %
Convenience	11	8	9
Comparison	54	38	30
Retail Service	23	16	15
Leisure Services	29	20	24
Financial and Business Services	15	11	10
Vacant	10	7	11
Total	142	100	100

Source: Experian

Figure 3: Floorspace in Pershore Town Centre (2014)

Category	Sq.m	%	UK Av. %
Convenience	4,450	20	15
Comparison	5,370	24	35
Retail Service	1,680	8	7
Leisure Services	6,960	32	25
Financial and Business Services	2,000	9	8
Vacant	1,530	7	10
Total	21,990	100	100

Source: Experian

Figure 5: Floorspace in Pershore Town Centre (2019)

Category	Sq.m	%	UK Av. %
Convenience	4,490	20	15
Comparison	6,790	31	35
Retail Service	1,330	6	7
Leisure Services	6,950	32	25
Financial and Business Services	1,620	7	8
Vacant	770	4	10
Total	21,950	100	100

Source: Experian

Diversity of Main Town Centre Uses

Pershire Town Centre provides a total of 142 retail and leisure units. This represents a slight decrease from 2014 when 145 units were recorded. In terms of the amount of retail, service and leisure floorspace within the centre, the overall level of floorspace (including units which are currently vacant) remains largely unchanged since 2014 (circa 21,950 sqm). Overall, the surveys show that town centre has neither contracted or expanded in the last 5 years.

Convenience Goods Units

There are currently 11 convenience providers in Pershire Town Centre (8% of the total units) occupying 4,490 sqm of floorspace (20% of the total floorspace). The proportion of units occupied by convenience goods floorspace is broadly comparable to the UK average (9%), however, in floorspace terms it is significantly higher than the UK average (15%). This is primarily due to the size of the Asda store, The number of convenience units has decreased by 1 since 2014, but the floorspace has increased marginally. This is due to the reconfiguration and expansion of several units, and some smaller retailers closing.

With the exception of Asda, Holland & Barrett, and Tesco Express, the convenience goods sector is represented by independent retailers including 3 delicatessens & grocers, a greengrocer, a tobacconist, butcher and a cobbler. Additional convenience goods stalls are provided in Pershire Retail Market which is open 4 days a week and including two bakeries, a sweet store, fruit/veg and flowers store and a butcher/deli.

Overall, the convenience goods offer in the town centre is considered to be healthy with a strong independent offering.

Comparison Goods Units

There is 6,790 sqm of comparison goods floorspace across 54 units in Pershire, accounting for 24% of the total floorspace in the town centre. Whilst the proportion of comparison goods units is significantly higher in Pershire than the national average (38% vs 30%), the proportion of floorspace is lower (31% vs 35%). This is due to the small size of the comparison units in the town centre with 43 out of the 54 below 160 sqm in size

Figures from 2014 point to an increase in comparison goods units/floorspace in the town centre. However, it should be noted that this increase is primarily due to Pershire Car Sales opening in the northern part of the High Street.



In terms of the type of comparison goods sold, 8 units are occupied by retailers selling DIY & home improvement or hardware & household goods, 7 units sell clothing or footwear, 6 are charity shops, and 5 are gift shops. Others include car sales units, booksellers, art dealers, florists, furniture stores, sports goods and a toy shop. Aside from the charity shops, the majority of the comparison units are occupied by independent operators. The only national multiple retailers are Boots, Savers and M&CO.

Overall, for its size and role in the shopping hierarchy, the comparison goods offer in Pershore Town Centre is considered to be good with independent retailers well represented.

Retail Services

The town centre presently provides 23 retail service units (16% of the total), comprising 6% of the retail and leisure floorspace within the centre. The retail service provision is broadly comparable to the national average. Since 2014, the number of retail service units have increased by two units (from 21 to 23) but the floorspace has dropped from 1,680 sqm to 1,330 sqm.

The retail service units are mainly small in size with only one unit above 100 sqm. There is a high representation of health and beauty providers in the town centre which account for 14 of the 23 retail service units. In addition, there are two opticians, a launderette, a travel agency, post office, dog grooming, undertakers, computer repair shop and a car wash.

Leisure Services

Overall, 32% of town centre floorspace (6,950 sqm) across 20% of the units (29) are used for leisure services, compared with the national average of 25% of floorspace and 24% of town centre units. The town centres' leisure service offer has improved by 2 units since 2014. For its size, the evening economy is reasonably well served with a total of 12 restaurants, public houses and bars in the town centre.

Other leisure units within the town centre include 6 fast food & takeaway units, 4 cafes, a gym, wellness centre, betting office and social club. The leisure offer in the town centre is also augmented by the Number 8 Arts Centre which provides cinema and theatre performances, and the Pershore Leisure Centre located opposite the Asda supermarket.

Financial and Business Services

There are presently 15 units (11% of the total), occupying 1,620 sqm floorspace in the town centre whereas in 2014, there were 16 units, occupying 2,000 sqm. The proportion of units and floorspace given to such uses is still broadly in line with the national average. There are 4 estate agencies located in the town centre, alongside 4 accountancy offices, an insurance office, 2 solicitors, 2 stone masons and 2 high street banks.

The financial and business service provision within Persnore has contracted over the past five years. Both HSBC and Barclays have closed branches in the town and Lloyds and TSB are the only banks/building societies remaining in the town centre.

Indoor Covered Market

Persnore supports a covered market (Persnore Retail Market) located just off High Street in the northern part of the town centre. The market is open on Wednesdays to Saturdays from 9.00 – 16.30. There are some 25 stalls within the market selling both convenience and comparison goods including baked goods, clothing, gifts, furniture, homeware, pet supplies, seafood, stationary and fresh meat. The market positively contributes to the variety to the retail offer within the town centre.

Non-Retail/Commercial Units

In addition to the retail, service and leisure units described above, Persnore Town Centre also accommodates a veterinary surgery, dental surgery, community centre, library and a church, as well as several professional offices. Persnore Abbey, Persnore Community Hospital and the council offices are also located on the edge of the town centre and contribute to activity and centre vitality and viability.

Operator Requirements

The 'Requirements List' identifies that there are currently 4 national retail and leisure operators seeking premises within Persnore. The operators seeking space in the town are shown in Figure 6 below. For its size and role, the operator requirements in Persnore Town Centre is considered to be reasonable.

Figure 6: Operator Requirements

Name	Min Size (sq m)	Max Size (sq m)
Retail/Services		
Aldi	1,765	
Heron Foods	232	465
Vets4Pets	139	186
Leisure – Food & Drink		
Dominoes	93	

Rents on Non-Domestic Property

No data relating to retail rental prices was readily available online at the time this appraisal was undertaken.

Vacancies

There are a total of 10 vacant retail and service units across Pershore Town Centre accounting for 7% of all units. The vacant units occupy 770 sqm of floorspace, 4% of the total across the town centre. Both in floorspace terms and in the proportion of units, the vacancy rate in Pershore is well below the national average (11% total units and 10% floorspace in an average UK town centre).

The vacant units are distributed across the town centre, although we note there are 3 empty units next to each other at 31-35 High Street. Data from 2014 indicates that these units have been vacant for at least four years.

The vacancy rate in Pershore has almost halved since 2014, when there were 19 empty units (13% of the total) which occupied 1,530 sqm (7% of the floorspace across the town centre).



Photograph 5: Vacant units at 31-35 High Street

Vacancies

PERSHORE

SURVEYED: JANUARY 2019

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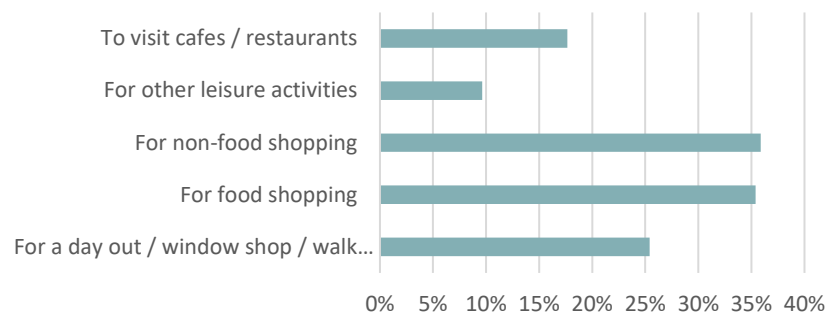
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Customers' Views and Behaviour

Using data from the NEMS household survey, we have been able to identify the behaviour and main reasons why respondents visit Pershore Town Centre, what they like about it and what, if anything would encourage them to visit the centre more often.

Of those who visit Pershore, 7% visit the Town Centre on a daily basis, 43% visit at least once or twice a week, and 30% visit at least once or twice a month. In relation to how people travel to the town centre, 79% of visitors arrive in a car or van and 16% of visitors walk to the town centre. Only 2% of visitors arrive into the town centre by public transport.

Main reasons people visit Pershore Town Centre

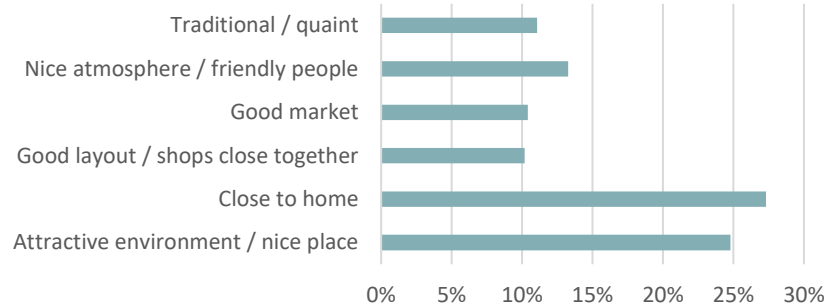


Food and non-food shopping provide the main reasons why people visit Pershore Town Centre. Other common reasons include visiting for a day out, window shopping or for a walk about, visiting cafes or restaurants, and visiting for other leisure activities.

The most common response when people were asked what they liked about the town centre was that it was close to home, followed by that it has a nice environment. Other common responses were that the town centre had a nice atmosphere with friendly people, it was traditional or quaint, that it had a good market, and that the town centre had a good layout with shops that are close together.

When asked about measures that would encourage them to visit the Town Centre more often, common answers from respondents included improving access / reducing traffic congestion, making parking cheaper or free, reducing the number of empty shops and encouraging more 'high street' retailers into the town centre. Notably however, 52% of respondents said that nothing would encourage them to visit Pershore more often, the highest response rate to this question across all centres in South Worcestershire. This response indicates a good level of satisfaction with the current offer in Pershore Town Centre overall.

Main reasons people like Pershore Town Centre



Measures that would encourage more visits to Pershore Town Centre



Pedestrian Flows

During our visits, we observed several areas of the Town Centre to be busier than others. The northern extent of the High Street was observed to be quiet although a steady flow of people used the walkthrough to the covered retail market. The highest levels of footfall were observed outside the Asda store and at the junction of High Street and Broad Street where there is small car parking area that provides 2 hours of free parking. This is consistent with the findings of the People & Places town centre report where pedestrian counts showed that footfall at the entrance to the covered markets and the north of High Street were approximately 25% of the totals in the busiest areas of the High Street.

Accessibility

The accessibility of the centre is determined by the ease and convenience of access by a choice of means of travel including that which is provided to pedestrians, cyclists and disabled people, and the ease of access from the main arrival points to the principle attractions in the centre.

Road Access

In terms of driving distances, Pershore Town Centre provides good connections to the surrounding area including the major settlements of Worcester (17km), Tewkesbury (17km) and Evesham (10km) and further afield to Birmingham, to the north, and Cheltenham, Gloucester and Bristol to the south. The town centre is well connected to the strategic highway network with Junction 7 and 8 of the M5 within 10km driving distance to the west.

Given its location along High Street and Broad Street, the entirety of the town centre is easily accessible by road. At the time of our visits, the road network was busy and some congestion was noted although overall the traffic was considered to be flowing reasonably well.

Car Parking

A limited amount of roadside parking is provided to the north of High Street and approximately 40 free short-stay spaces are available in the car park on Broad Street. Other car parks close to the town centre include the High Street car park outside Asda (236 spaces) and the car park at the Civic Centre to the north (279 spaces).

During our visits, the car parking within the town centre was busy, and at points, we noted several cars parked on double yellow lines along High Street. The People & Places town centre report from 2017, however, indicated that 23% of spaces within the town centre are available during peak shopping hours and no particular parking issues are indicated from the NEMS household survey results.

Public Transport

Regional and local bus services are available from stops on Broad Street and High Street. Although Pershore does have a railway station, it is located approximately 2.2km to the north east, away from the town centre. The station is served by infrequent services to Worcester, Great Malvern, Hereford and hourly services to Oxford and London Paddington.

Walking, Cycling and Disabled Access

Access for pedestrians within Pershore is generally good and the size of the centre means that it is easily walkable from each of the car parks in and around the centre and its surrounding residential areas.

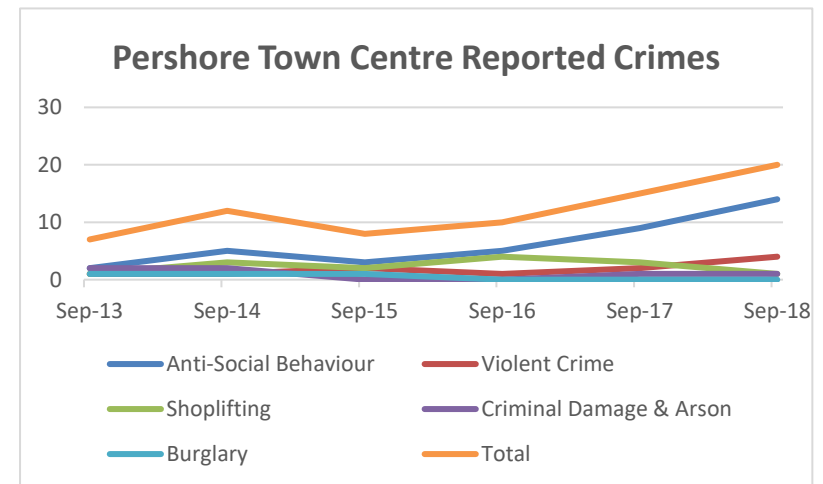
We consider the cycling facilities in Pershore to be good. Secure cycle parking is available outside Asda and at the car park on Broad Street and at the time of our visits these were observed to be reasonably well used. National Cycling Route 442 runs through Pershore Town Centre and connects the town to Worcester and Evesham and there is a 20mph speed restriction on the High Street.

Pershore is considered to provide good disabled accessibility with relatively wide pavements and generally flat topography. In addition, free and unlimited car parking is available for disabled users in the council operated car parks and a number of on-street locations closer to the shops, have dedicated disabled car parking spaces.

Perception of Safety and Occurrence of Crime

Pershore Town Centre felt very safe on our visits and the active frontages along both sides of High Street and Broad Street provide a good level of natural surveillance. Wychavon District Council operate a network of 9 CCTV cameras across Pershore, covering the main shopping areas, the town centre car parks and in the nearby Abbey Park. These cameras are supplemented by privately operated CCTV systems and assist police by enabling them to react to incidents and provide evidence for prosecutions.

A study of crime statistics in the town centre show that reports of five common crimes are low, but they have broadly increased since 2016. Incidences of anti-social behaviour have consistently been the most commonly reported crime in Pershore followed by reports of shoplifting and violent crime. The number of anti-social behaviour, violent crime, shoplifting, criminal damage & arson and burglary crimes report across the town centre has risen from 7, as reported in September 2013 to 20, reported in September 2018.





Town Centre Environmental Quality

Pershore Town Centre is covered by the Pershore Conservation Area and most of the buildings along High Street and on Broad Street are listed for their architectural or historical merit. The townscape is varied, with the Georgian buildings that line the main shopping areas providing shopfronts that are attractive and of high quality. The street lighting, directional signs and bollards are of a uniform style across the town centre which contributes to the high-quality aesthetic and the other street furniture within the town centre is well dispersed, with benches and way finding signs positioned at strategic locations.

At the time of our visits, there was little in the way of litter or graffiti in the main shopping areas although some litter was observed within the car parks outside the Pershore Retail Market. This area is generally of a lower environmental quality than the rest of the town centre as the buildings have a more functional appearance and are located further apart.

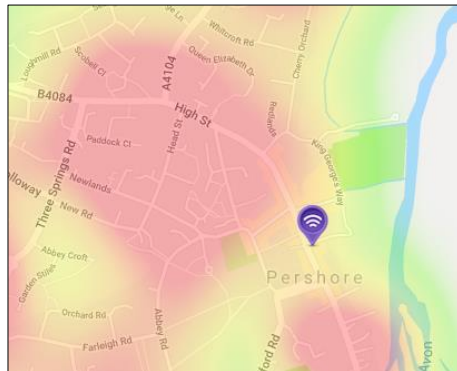
As stated in previous sections, the traffic on High Street generally flows well, but at particularly busy periods, detracts from the environmental quality of the centre. Notwithstanding this, we consider the main shopping areas of the town centre as generally having a very good environmental quality overall.

Digital Facilities in Pershore Town Centre

Developing a 'bricks & clicks' environment can benefit a town centre by attracting additional visitors and bringing a further layer of interaction through the promotion of events and advertising. BT and The Cloud (provided by Sky) provide the most commonly offered free Wi-Fi hotspots within town centres, while Collect + and Amazon provide town centre facilities where customers can collect items that they have ordered from online retailers.

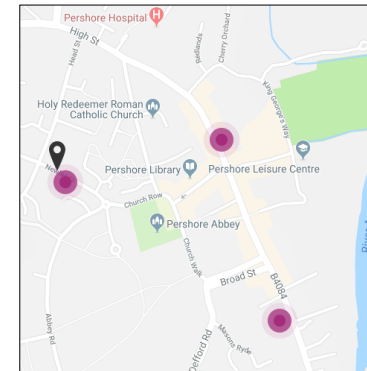
Pershore Town Centre has its own website which promotes the shops within the town (<https://www.shoppinginpershore.co.uk/>). The website provides information on parking, cultural facilities, the different shopping offers and travel information for the town and provides an interactive map. Although the website is easily navigable and provides a comprehensive range of information, some of the details appear to be somewhat out of date, having last been updated in Spring 2017.

BT Wi-Fi Hotspots



Source: www.btwifi.co.uk/find/

Sky Cloud Wi-Fi Hotspots



Source: www.sky.com/wifi/hotspotfinder

The Wi-Fi coverage across Pershore Town Centre is generally good, BT's website indicates that there is a strong signal across most of the town centre with one BT primary hotspot provided while there are 2 Cloud Wi-Fi hotspots within the town centre and one just outside. There are currently no Collect+ facilities or Amazon Lockers within Pershore. Given its small size, this is not surprising. We note however that the Post Office on High Street provides an Amazon Pickup location, similar to click and collect services provided by other stores. Mobile phone signal availability in Pershore is particularly poor.



Conclusions

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

Strengths and Opportunities

- Attractive and historic built environment.
- Strong leisure service offer including facilities supporting the evening economy.
- Very good environmental quality.
- Low, and decreasing, vacancy levels across the town centre.
- The number of independent businesses contribute to a distinctive shopping offer.
- Direct access to the strategic highway network.
- Compact and walkable main shopping area.
- The market contributes to the vitality and viability of the town centre.
- Asda is an important key anchor for the town centre.
- Opportunities exist to make more of the town's riverside location.

Weaknesses and Threats

- Low levels of footfall to the north of the Town Centre.
- Railway station is poorly linked to the Town Centre
- High proportion of smaller retail units which may not meet modern retailer requirements.
- The local highway network can become busy, limiting pedestrian connectivity and detracting from environmental quality.
- Statistics indicate that reported crime has increased since 2013, albeit from a very low level.

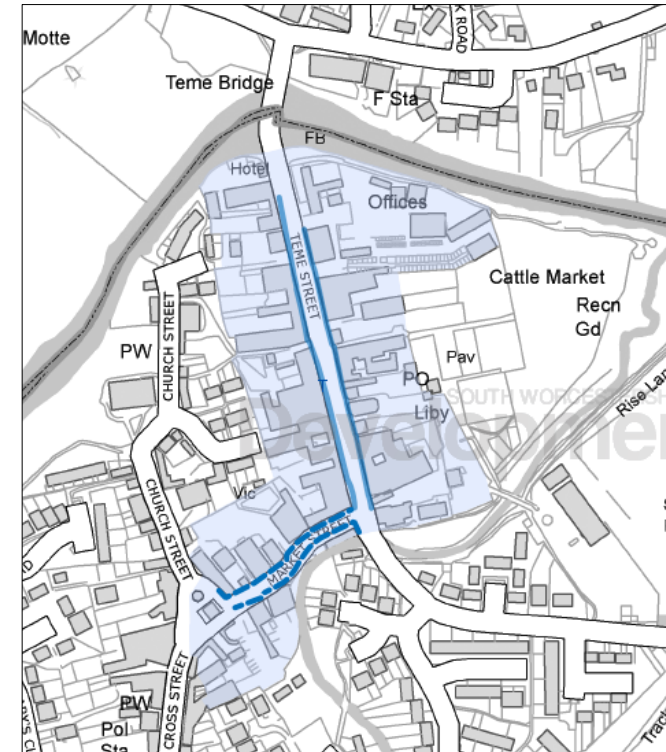
Tenbury Wells Town Centre Health Check Appraisal

Tenbury Wells is located at the north western part of Malvern Hills District. With a population of circa 3,750 people and supporting a total of 89 retail and leisure units, Tenbury Wells is one of the smallest town centres in South Worcestershire (Upton-upon-Severn being the only smaller town centre). The town itself serves a rural area and the nearest large settlement is Kidderminster, some 30km (driving distance) to the north east.

The designated Town Centre forms an 'L shape', along Market Street to the south and then north along Teme Street to the bridge across the river. The designated Primary Shopping Frontage runs along the length of Teme Street, whilst the Secondary Frontage covers both sides of Market Street.

Unlike the other town centre health checks undertaken to support this study, we have been unable to use Experian Goad surveys as a basis of our statistical analysis as none have been carried out in Tenbury Wells. Instead, we have used town centre occupancy surveys carried out by Malvern Hills District Council in 2014 and in January 2019. These surveys provide a record of the occupants of the retail & leisure units.

The key facilities currently located in the town centre include the Tesco foodstore, The Regal cinema/theatre and The Pump Rooms.



Source: South Worcestershire Development Plan (2016)

Photographs of Tenbury Wells Town Centre



Photograph 1: View west along Market Street



Photograph 2: View east along Market Street



Photograph 3: View north up Teme Street



Photograph 4: Tenbury Wells Pump Rooms



Photograph 5: Shopfront along Market Street



Photograph 6: Tesco store off Teme Street

Diversity of Town Centre Uses

Figure 1: Number of Units in Tenbury Wells Town Centre (2019)

Category	No	%	UK Av. (%)
Convenience	9	10	9
Comparison	26	29	30
Retail Service	16	18	15
Leisure Services	21	24	24
Financial and Business Services	12	13	10
Vacant	5	6	11
Total	89	100	100

Source: Malvern Hills District Council, 2019

Figure 2: Number of Units in Tenbury Wells Town Centre (2014)

Category	No	%	UK Av. (%)
Convenience	7	8	8
Comparison	25	27	33
Retail Service	19	21	14
Leisure Services	21	23	22
Financial and Business Services	12	13	11
Vacant	7	8	11
Total	91	100	100

Source: Malvern Hills District Council, 2014

Tenbury Wells Town Centre presently accommodates a total of 89 retail and leisure units. Of these, 9 are convenience units (10%), 26 are occupied by comparison goods retailers (29%), 16 by those providing retail services (18%), 21 by leisure units (24%) and 12 by financial and business service providers (13%).

Convenience Goods Units

The town centre accommodates a large Tesco foodstore located off Teme Street (former Cattlemarket site) which opened in 2017. The only other national convenience retailer in the Town Centre is Spar, located immediately adjacent to Tesco. There is also a Nisa Local store just south of the town centre, adjacent to Market Square. Other convenience units within the town centre include a butcher, confectioner, a bakery and a fishmonger. The opening of the Tesco foodstore has made a positive contribution to the vitality and viability of the town centre by helping the town centre to retain convenience goods expenditure, increasing footfall, and providing potential for spin-off benefits to other services/facilities in the town centre.

Comparison Goods Units

The comparison goods offer in the town centre comprises mostly of independent operators apart from the 7 charity shops which are operated by a variety of local and national charities. Goods on offer in the town centre include clothing, gifts, stationary, artwork and antiques. The proportion of comparison goods units within Tenbury is comparable to the UK average which is surprising given the centres primarily local services/shopping role.



Diversity of Town Centre Uses

Retail Services

The 16 retail services units in Tenbury Wells include hair salons, barbershops, 2 vehicle repair garages, an undertaker, opticians, a computer repair shop and a travel agent. All of the retail service providers are local or independent businesses. Whilst the number of services has reduced by 3 since 2014, the town centre continues to provide a good level of retail service provision for its local catchment.

Leisure Services

The number of leisure service units in the town centre remains the same as in 2014. However, since this time, the Royal Oak Hotel has closed, and another unit has opened. Unusually for the size of the town, Tenbury Wells Town Centre accommodates a cinema and theatre. Located on Teme Street, The Regal is owned and run by the Town Council and provides film screenings and live theatre performances. The Regal is an important key attractor of the town centre and contributes to the centres evening economy.

The leisure service offer in the town centre is also complemented by several public houses and restaurants located along Cross Street to the south of the town centre, and by the swimming pool, gym and sports facilities to the east of Teme Street.

Financial and Business Services

Following the closure of the Barclays Bank, the bank/building society provision in the town centre has seen a decline. The only high street bank now present in the town centre is TSB. With the opening of a branch of the locally run NILS (No Interest Loan Scheme) which provides financial assistance to those in financial hardship, the overall level of financial and business service provision has remained the same. Other financial and business services in the town centre include several estate agencies, accountancy offices, solicitors and a building supplies firm.

Non-Retail/Commercial Units

Tenbury Wells is famous for its Pump Room which feature distinctive 'Chinese-Gothic' architecture. The Pump Rooms are now owned by the Town Council and are used for their offices and council meetings. However, they are also open to the public and are available to hire for weddings and other events. Other facilities include a library, doctors' surgery and 3 dental surgeries.

Events

Several annual events are held in Tenbury Wells each year. These include Tenbury Applefest, the Mistletoe Festival, Countryside Show and the Christmas lights switch-on.



Vacancies

Since 2014, the number of vacancies in the town centre has decreased from 7 (8% of the total units), to 5 (6% of the total). The proportion of vacancies is significantly lower than the national average of 11% which indicates that there is a good demand from retailers/service providers for floorspace within the town centre. In terms of their distribution, there are currently 3 vacant units located on Teme Street (no. 30, 44 and unit 5, Teme Court) and 2 on Market Street (no. 7 and the former Royal Oak Hotel).

Town Centre Environmental Quality

Tenbury Wells Town Centre is an attractive centre which was both clean and tidy at the time of our visits. There was very little litter and no visible signs of graffiti or vandalism. The recent public realm works around the new Tesco foodstore and along Market Street have been carried out well and are of a high quality, working well within the largely Victorian town centre.

Pedestrian Flows

Pedestrian flows were monitored to be highest in the vicinity of the Tesco foodstore with good levels also observed close to the small car park off Market Square at the south western extent of the town centre. Having regard to its size and role, reasonable levels of footfall were also observed elsewhere in the town centre at the time of our visits.

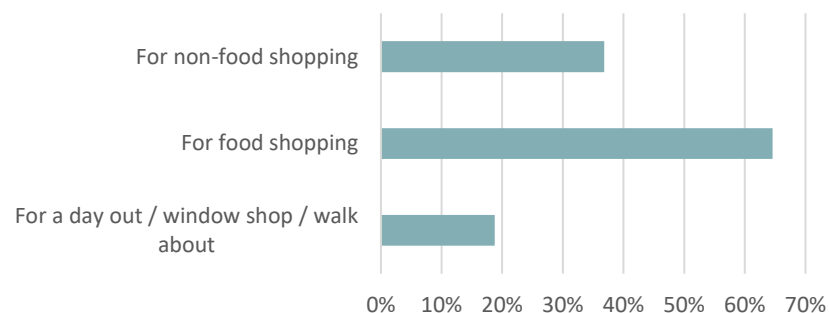
Customers' Views and Behaviour

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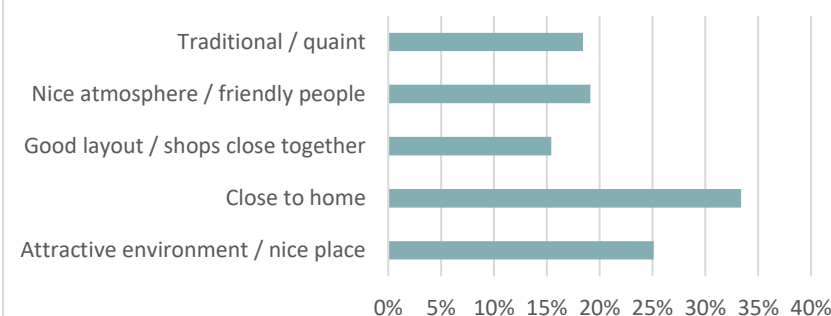
Of those who visit Tenbury Wells, 17% visit the town centre on a daily basis, 42% visit at least once or twice a week, and 18% visit at least once or twice a month. In relation to how people travel to the town centre, 85% of visitors arrive in a car or van and 13% of visitors walk to the town centre. Notably, none of the respondents indicate that they visit the town centre by bus or other public transport.

Visiting for food shopping was the cited by the majority of respondents as the main reason for visiting the town centre. Visiting the town centre for non-food shopping, and for a day out/ to window shop / to walk about were also other common reasons given.

Main reasons people visit Tenbury Wells Town Centre

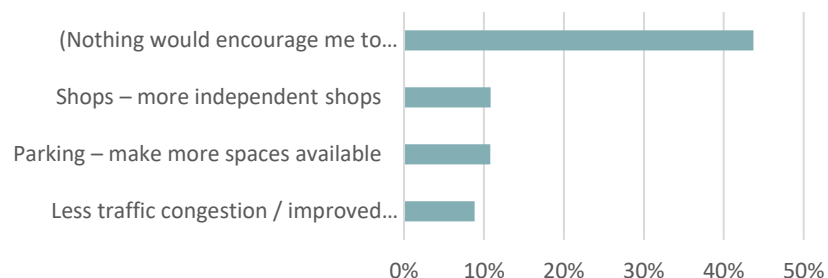


Main reasons people like Tenbury Wells Town Centre



A variety of different reasons were given for why respondents like visiting Tenbury Wells. The most popular answers were that it is close to home (33% of respondents) and that it provides an attractive environment (25%). Other common reasons include that it has a nice atmosphere/is friendly, has a good layout and that the shops are close together, and that it is traditional / quaint.

Measures that would encourage more visits to Tenbury Wells Town Centre



The most common answer given when people were asked what would encourage them to visit the town centre more often was that nothing would (44% of respondents). This indicates that in general people are satisfied with the offer within Tenbury Wells. Other answers given included making more car parking spaces available (11%), having more independent shops (11%) and reducing the amount of traffic congestion on the roads (9%).

Perception of Safety and Occurrence of Crime

Tenbury Wells felt safe at the time of our visits, aided by the natural surveillance provided by the active shopfronts. As shown below in Figure 3, an examination of local crime statistics for the past five years shows that the levels of commonly reported town centre crimes are generally low across the town centre.

Figure 3: Reported Crimes in Tenbury Wells Town Centre

Crime	Sep-13	Sep-14	Sep-15	Sep-16	Sep-17	Sep-18
Anti-Social Behaviour	5	4	4	1	1	1
Violent Crime	1	0	1	6	2	2
Shoplifting	1	0	0	0	0	1
Criminal Damage & Arson	3	0	1	0	2	3
Burglary	1	0	0	0	1	0
Total	11	4	6	7	6	7

Source: ukcrimestats.com

Accessibility

Road Access

By virtue of its rural location at the north west of Malvern Hills District, Tenbury Wells is some distance from the other towns within South Worcestershire. The towns of Ludlow and Leominster (in Shropshire and Herefordshire) are located to the north west and south west of the town some 16km away, whilst Worcester is the closest major settlement in South Worcestershire at 34km. The A456 runs to the north of Tenbury Wells and provides a direct route to Kidderminster (some 30km to the east), while the B4204 to the south links to Worcester.

Car Parking and Public Transport

At the time of our visits, we observed pressure on car parking spaces with numerous cars waiting within the Council run Teme Street car park for a space to park. Whilst a good level of on-street parking spaces is provided on Teme Street and Market Street available spaces were also limited at the time of our visits. Other car parks in the vicinity to the town centre include a long stay car park at Palmers Meadow (Tenbury Wells Leisure Centre/Swimming Pool), a small car park of between 10-15 spaces at Market Square, and the car park for customers of Tesco off Teme Street.

Tenbury Wells is poorly served in terms of public transport provision and only a very few infrequent bus services stop in the town centre. It is noted that less than 1% of respondents to the household survey indicated that they arrived into the town centre by bus, compared with 85% who travelled by car or van and 13% who walked.

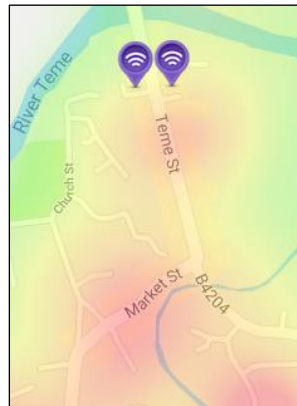
Walking and Disabled Access

Pedestrian access within the town centre is generally good. The topography of Tenbury Wells is flat, and the size of the centre means that it takes approximately 5 minutes to walk from one end to the other. Teme Street has reasonably wide pavements which are free from obstruction. The bollards on the pavements on Market Street, which help prevent double parking and improve pedestrian safety, create pinch points which can in part hinder pedestrian circulation in this part of the centre. Teme Street benefits from a pedestrian crossing which assists pedestrian circulation in this part of the centre. We consider that Market Street would benefit from a similar crossing to assist circulation in this part of the centre also.

Overall, Tenbury Wells is generally easily accessible for pedestrians but would benefit from an enhancement to its car parking provision.

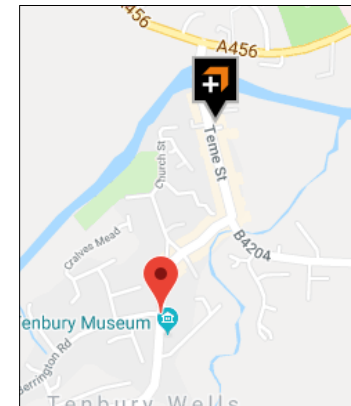
Digital Facilities in Tenbury Wells Town Centre

BT Wi-Fi Hotspots



Source: www.btwifi.co.uk/find/

Collect + Locations



Source:
<https://www.collectplus.co.uk/store-locator?v=2>

Developing a 'bricks & clicks' environment can benefit a town centre by attracting additional visitors and bringing a further layer of interaction through the promotion of events and advertising. BT and The Cloud (now Sky) are identified by the ATCM (Association of Town & City Management) as providing the most commonly offered free Wi-Fi hotspots within town centres, while Collect + and Amazon commonly provide town centre facilities where customers can collect items that they have ordered from online retailers.

There is generally good free Wi-Fi coverage across Tenbury Wells. BT provide 2 primary hotspots although we note that there are no Sky/The Cloud locations within the town. There is presently one Collect + location at the Spar shop at 54-64 Teme Street in the north of the town centre but there are no Amazon Lockers. Considering the size of the town, we consider that overall there is an adequate provision of digital facilities within the town centre.



Conclusions

Overall, the Town Centre is considered to display very good levels of vitality and viability. There are low vacancy rates and a good range of products and services are available for its local catchment. Having regard to our vitality and viability health check assessment, including feedback from key stakeholders, we consider that the principal strengths, weaknesses, opportunities and threats to the centre are as follows

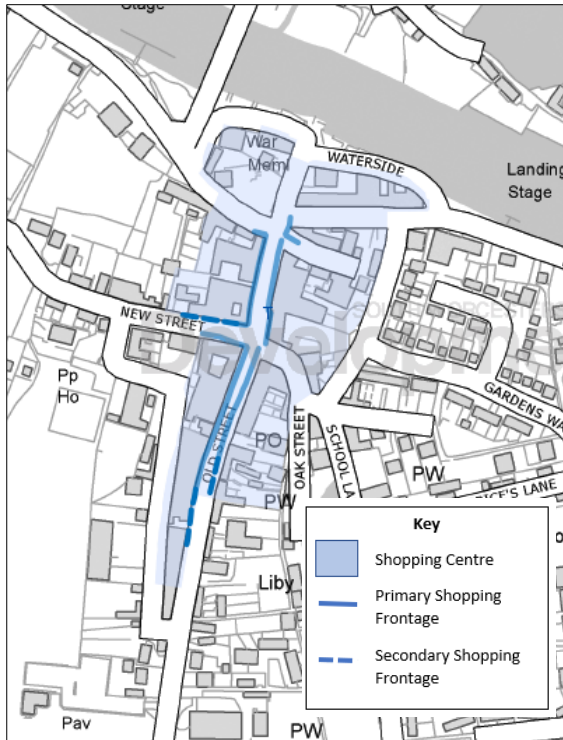
Strengths and Opportunities

- Attractive, compact and walkable town centre.
- Generally, a good level of services/facilities catering for the day to day needs of its local residents.
- Convenience goods provision has been significantly strengthened following the opening of the Tesco foodstore.
- Low vacancy rate.
- The Regal Cinema
- Good footfall monitored within the town centre.

Weaknesses and Threats

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

Upton-upon-Severn Town Centre Health Check Appraisal



Source: South Worcestershire Development Plan
(2016)

Upton-upon-Severn is a small riverside town within the Malvern Hills District in South Worcestershire. Located at a key crossing of the River Sever, the town lies approximately 17km (driving distance) south of Worcester and 11km to the south east of Great Malvern. The town centre is linear in form and extends from the junction of Old Street and Backfields Lane, north along High Street and it ends at the River Sever.

The Town Centre primarily serves a service role for its local rural catchment and as a tourist centre. Providing a total of 79 commercial units with a combined floorspace totalling 9,720sq m, Upton-upon-Severn Town Centre is the smallest town centre within South Worcestershire. Although small in size, the town is well known as the host of numerous events each year, including separate jazz, folk and blues festivals and the Sunshine family music festival. The town has also frequently been a finalist in the annual 'Britain in Bloom' competition.

Aside from its attractive riverside setting, key features of the town centre include 'The Pepperpot' bell tower which hosts the Upton-upon-Severn Heritage Centre, the Tudor House Museum and the numerous public houses and restaurants along Old Street and High Street.

Photographs of Upton-upon-Severn Town Centre



Photograph 1: View along New Street



Photograph 2: 'The Pepperpot'



Photograph 3: Shop frontages along Old Street



Photograph 4: The Swan Hotel



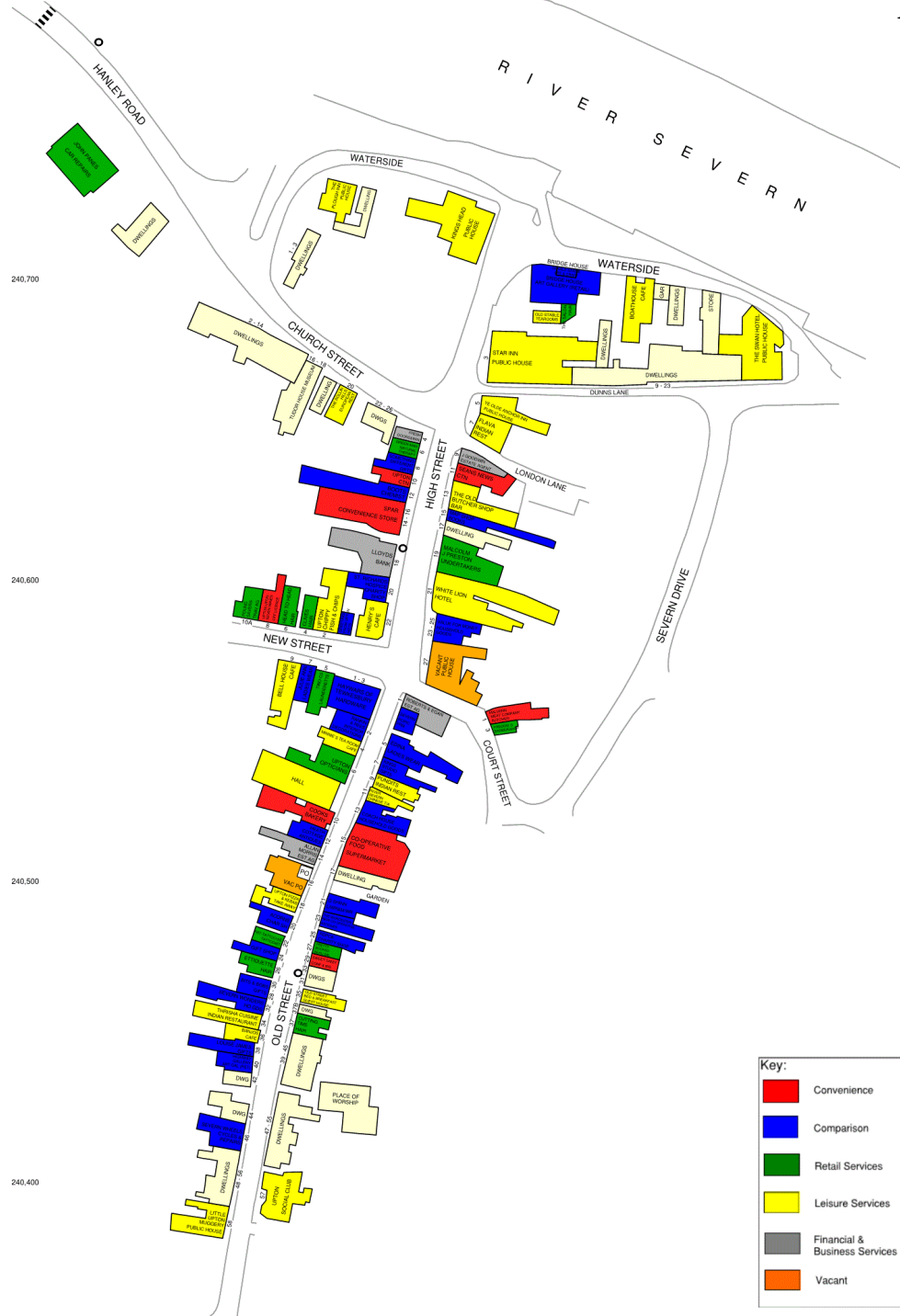
Photograph 5: Junction of Church Street and High Street

Diversity of Main Town Centre Uses

UPTON UPON SEVERN

SURVEYED: 11 FEBRUARY 2018

385,300



Key:

Red	Convenience
Blue	Comparison
Green	Retail Services
Yellow	Leisure Services
Grey	Financial & Business Services
Orange	Vacant

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Diversity of Main Town Centre Uses

Figure 1: Number of Units in Upton-upon-Severn Town Centre (2015)

Category	No.	%	UK Av. %
Convenience	7	9	9
Comparison	26	33	32
Retail Service	14	18	14
Leisure Services	22	28	23
Financial and Business Services	5	6	11
Vacant	6	8	11
Total	80	100	100

Source: Experian

Figure 3: Number of Units in Upton-upon-Severn Town Centre (2018)

Category	No.	%	UK Av. %
Convenience	8	10	9
Comparison	26	33	30
Retail Service	14	18	15
Leisure Services	24	30	24
Financial and Business Services	5	6	10
Vacant	2	3	11
Total	79	100	100

Source: Experian

Figure 2: Floorspace in Upton-upon-Severn Town Centre (December 2015)

Category	Sq.m	%	UK Av. %
Convenience	1,000	10	15
Comparison	2,360	24	35
Retail Service	1,520	16	7
Leisure Services	3,710	38	25
Financial and Business Services	490	5	8
Vacant	640	7	10
Total	9,720	100	100

Source: Experian

Figure 4: Floorspace in Upton-upon-Severn Town Centre (February 2018)

Category	Sq.m	%	UK Av. %
Convenience	1,130	12	15
Comparison	2,460	25	35
Retail Service	1,280	13	7
Leisure Services	3,970	41	25
Financial and Business Services	490	5	8
Vacant	390	4	10
Total	9,720	100	100

Source: Experian

Diversity of Main Town Centre Uses

Convenience Goods Units

Upton Town Centre accommodates 8 convenience units that occupy some 1,130 sqm of floorspace. The convenience offer comprises two general convenience stores, two confectionary, tobacco & news units, two bakers & confectioners, an off licence, and a butcher. Co-operative Food and Spar provide the main food shopping offer in the town from units of 300sq m and 290 sqm respectively. The proportion of floorspace given to convenience goods in Upton is below the national average (12% vs an average of 15%). Compared with data from 2015, the convenience goods sector within the town centre has grown by 1 unit and 130 sqm floorspace.

Comparison Goods Units

26 units across the Town Centre are occupied by comparison goods retailers, the same number as in 2015. 33% of the units across Upton-upon-Severn Town Centre are occupied by comparison goods which is above the national average of 30%, however, the proportion of floorspace for such uses is 10% below average at 25%, showing that the units in Upton are particularly small. Indeed, only one unit is larger than 200 sqm and the rest vary in size between 20 sqm and 190 sqm. As demonstrated by the NEMS Household survey the majority of residents shop at larger centres for their comparison goods shopping.

The comparison goods offer in part serves local residents and tourists. It comprises five art dealers or antique shops, five craft, gifts, china & glass shops (primarily targeted at tourists), five DIY & home improvement or hardware & household goods units, three clothes shops, three charity shops, two newsagents & stationers, a music record shop, a bookseller, and a cycle shop. With the exception of the three charity shops in the town centre, all of the other units are run by independents or local businesses.

Retail Services

14 units in the town centre provide retail services and of these, nine are health & beauty providers. In addition to this there is a travel agency, a laundrette, undertakers, an optician, and a vehicle repair & servicing unit. Overall, 18% of units within Upton Town Centre are occupied by retail services, 4% higher than the national average of 14%. For its size the retail service provision in the town centre is considered to be reasonable.

Leisure Services

The town centre maintains a very strong leisure service offer (catering for both tourists and local residents), with leisure providers occupying 30% of the total units within Upton-upon-Severn (24). 41% of the floorspace across the town centre is occupied by leisure services, a significantly higher proportion than the national average of 25%. The leisure offer comprises of eight public houses and bars, six cafes, four restaurants, three fast food & takeaway units, two social clubs & halls and a hotel.

Financial and Business Services

Town Centres financial and business service provision is limited. The centre provides 3 estates agents and up until November 2018 1 bank (Lloyds Bank). Lloyds bank has now closed and a mobile Lloyds bank operate in the centre on Mondays and Fridays.

Non-Retail/Commercial Units

In addition to The Heritage Centre and Tudor House Museum in the town centre, a large marina catering for pleasure boaters is located just north of the town centre on the opposite side of the River Severn. The marina is an approximate 5 minute walk to the town centre and attracts additional visitors to the town. Upton Rugby Club and playing fields is also located to the south of the town centre off Old Street.

Events

The town is well known for hosting numerous musical events each year, including separate jazz, folk and blues festivals and the Sunshine family music festival.

Vacancies

The vacancy rate across the Town Centre is low, with only 2 units recorded as empty at the time of the survey. This equates to 3% of the units in the Town Centre, occupying 4% of the floorspace, well below the UK average for both measures. The vacant units are the former Post Office at 16 Old Street (which has moved to 11 High Street) and the former Talbot Head Hotel. The vacancy rate has improved since 2015, when 6 vacant units were recorded.



Photograph 6: Vacant former Talbot Head Hotel

Vacancies

UPTON UPON SEVERN

SURVEYED: 11 FEBRUARY 2018

Vacancy Plan

385,300

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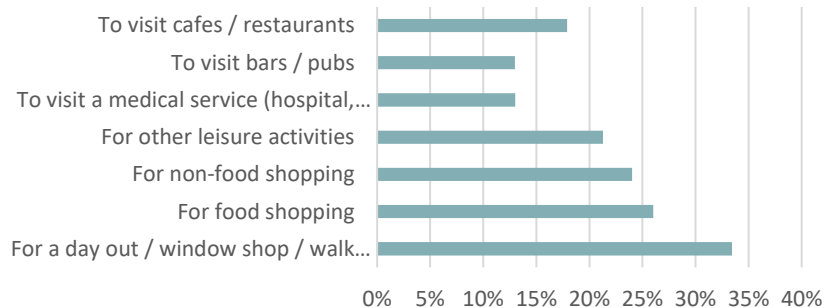
Customers' Views and Behaviour

Using data from the NEMS household survey, we have been able to identify the main reasons how and why respondents visit Great Malvern Town Centre, what they like about it and what, if anything would encourage them to visit the centre most often.

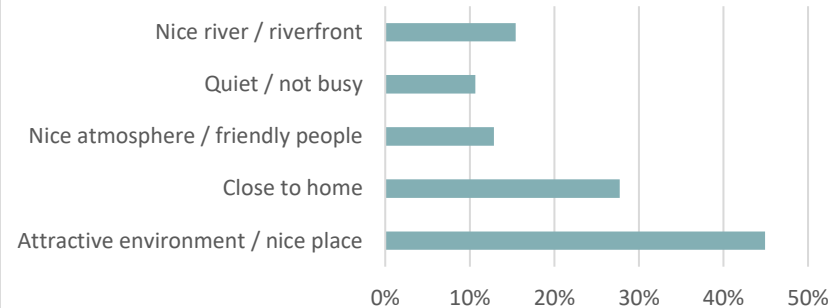
Of those who visit Upton-upon-Severn, 18% visit the town centre on a daily basis, 30% visit at least once or twice a week, and 25% visit at least once or twice a month. In relation to how people travel to the town centre, 80% of visitors arrive in a car or van and 15% of visitors walk to the town centre. 3% of visitors arrive into the town centre by bus.

A variety of reasons were given as to why people visited Upton-upon-Severn Town Centre. The most common reasons given was visiting the town centre for a day out or to window shop (33% of responses). Other answers included for food and for non-food shopping, for other leisure activities, to visit a medical service, to visit bars or pubs, and to visit cafes or restaurants.

Main reasons people visit Upton-upon-Severn Town Centre

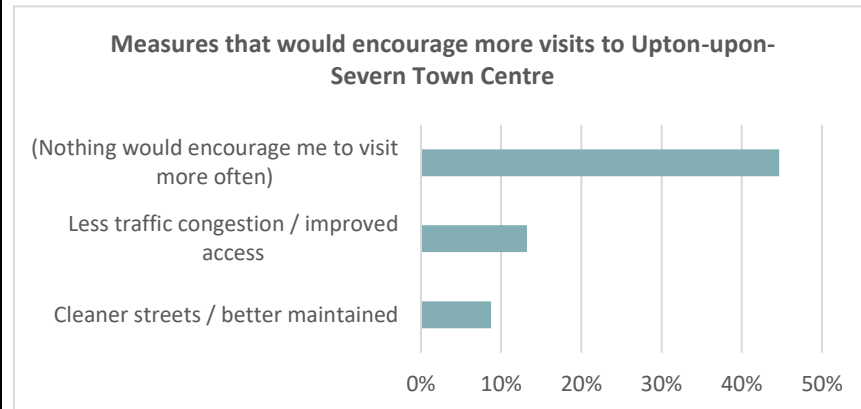


Main reasons people live Upton-upon-Severn Town Centre



45% of respondents indicated that they liked the attractive environment most about Upton-upon-Severn Town Centre, 28% liked that it is close to home, 15% like the river / riverfront and 13% like the nice atmosphere / friendly people most.

When asked what measures would encourage more visits to the Town Centre, nearly half of respondents indicated that nothing would, indicating that they were satisfied with how it is. 13% of respondents would visit more if there was less traffic congestion, and 9% if the streets were cleaner or better maintained.



Pedestrian Flows

Pedestrian activity in the Town Centre fluctuates throughout the year. At the time of our visits, it was during an off-peak season and footfall was observed to be low across the town centre. We understand that this is reflected in feedback given by local business to Malvern Hill District Council and that during peak holiday periods footfall is significantly higher.

Accessibility

Road Access

Upton-upon-Severn is located directly on the A4014 at a crossing of the River Severn. This A4014 junctions with the A38 1.5km north west of the town, providing access to Worcester to the north (16km driving distance) and with the wider highway network at Junction 1 of the M50 motorway, 6km to the south. In terms of the local highway network, direct vehicular access is available to all of the town centre although Old Street is narrow and we observed that some larger vehicles struggled to pass oncoming traffic in some places.

At the time of our visits, major highway works were being carried out on A4104 just to the north of the town centre. This resulted in severe congestion on the surrounding roads at peak times, impacting on the accessibility of the town.

Car Parking

For a town the size of Upton-upon-Severn, a good level of car parking is provided within walking distance of the town centre, although we understand that it may reach capacity during peak holiday periods and when large events such as the Jazz Festival are held. There is a limited amount of free short stay parking available at the northern end of High Street, otherwise Old Street car park to the south of the centre provides 80 free parking spaces, and Hanley Road car park to the north west provides 202 short-stay and long-stay spaces.

Public Transport

The public transport provision in Upton is limited and has reduced since a reduction in subsidies for rural bus services was introduced in September 2018. Bus stops on Hanley Road and on High Street provide services to Worcester, Great Malvern and Tewkesbury, however, these services are infrequent.

Walking, Cycling and Disabled Access

The town centre is easily accessible to pedestrians owing to its small size and flat topography. The lack of pedestrian crossings on High Street and Old Street does hamper connectivity to some extent. In terms of access for those with mobility problems, the town centre is generally accessible, but narrow pavements in some places may present some inconvenience. We observed few facilities for cyclists within the town centre.

Perception of Safety and Occurrence of Crime

At the time of our visits, the town centre felt very safe. A review of local crime statistics supports our perception. When records of five commonly reported crimes in town centres are examined in Upton over the past five years, the crime rate is low. In the sample we have selected, less than 10 crimes were reported each month, varying between 3 in September 2013, and 9 in September 2017, these figures are displayed in Figure 5 below.

Figure 5: Reported Crimes in Upton-upon-Severn

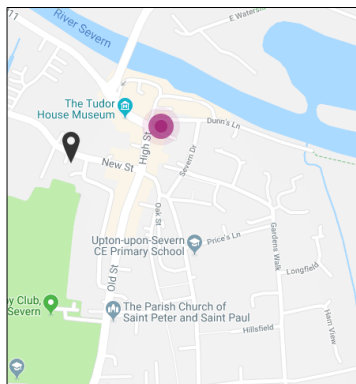
Crime	Sep-13	Sep-14	Sep-15	Sep-16	Sep-17	Sep-18
Anti-Social Behaviour	3	2	3	0	2	3
Violent Crime	0	3	2	2	4	0
Shoplifting	0	0	0	0	1	1
Criminal Damage & Arson	0	0	1	0	2	3
Burglary	0	1	0	2	0	0
Total	3	6	6	4	9	7

Town Centre Environmental Quality

Overall, the environmental quality of Upton-upon-Severn was observed to be very good. The town's riverside location provide a pleasant environment and it was clean and generally well maintained on our visits. The town centre is enhanced by very attractive planting in public areas and the town is evidently proud of its achievements in being the recipient of a Gold Award in the 2018 Britain in Bloom competition. Many of the town's buildings date from the 18th Century or earlier and the majority of buildings in the town centre are listed. The buildings along the main shopping streets are architecturally varied, contributing to a high quality, visually interesting street scene.

Digital Facilities in Upton-upon-Severn Town Centre

Sky Cloud Wi-Fi Hotspots



Source: www.thecloud.net/free-wifi/find-a-hotspot/

The digital service provision in Upton-upon-Severn is limited to only 1 Sky/Cloud wi-fi hotspot. BT provide no primary Wi-Fi hotspots and there are currently no Collect + facilities or Amazon Lockers in the locality, although an Amazon collection service is available from the Post Office. Given the size of the town centre, the lack of digital services is not surprising, however the town centre may benefit from investment in wifi and click and collect facilities to encourage further footfall and in turn spin-off benefits to other businesses/services.



Conclusions

Overall, the town centre displays good levels of vitality and viability. Having regard to our vitality and viability health check assessment, including feedback from key stakeholders, we consider that the principal strengths, weaknesses, opportunities and threats to the centre are as follows:

Strengths and Opportunities

- The town centre has a strong leisure offer and clearly benefits from hosting several high-profile (jazz, blues, folk) annual events
- The town centre is reasonably well connected to the strategic highway network.
- Attractive and historic built environment in a favourable riverside location.
- Very good environmental quality.
- The town centre has a very low and decreasing vacancy level.
- Attractive tourist destination with shops/services providing a dual function for local residents/tourists.

Weaknesses and Threats

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