Wychavon

Town Centres & Retail Study

WYCHAVON DISTRICT COUNCIL

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Prepared on behalf of

WYCHAVON DISTRICT COUNCIL

Prepared by

DPDS CONSULTING

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Wychavon

Town Centres & Retail Study

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1.0 Introduction

Background

1.1 Wychavon District Council instructed DPDS Regional Ltd to prepare a Town Centre and Retail Study to help inform policies of the emerging Wychavon Local Development Framework (LDF). Work on this Study began in May 2006.

Objectives of the Study

1.2 The key objectives of the Study are as follows:

- To assess retail expenditure capacity for the District up to 2021;
- To undertake a household shopping survey to establish shopping patterns and to inform the healthchecks of the 3 town centres in the District (Evesham, Droitwich Spa and Pershore);
- To establish the Primary Shopping Area for the three centres (see 7.24 for definition);
- To review existing retail allocations in the adopted Wychavon Local Plan and to consider additional or alternative sites in light of the findings of the study;
- To present a full appraisal of alternative sites for retail development in accordance with the requirements of the sequential approach set out in PPS6;
- To ensure that the methodology for the Study and the Council's LDF strategy and policies are compliant with national and regional policy and guidance; and
- To consider the retail situation in the District as a whole and assess whether the retail needs of all residents are being met, particularly those living outside Evesham, Droitwich Spa and Pershore, and those who may be experiencing social exclusion.

Study Structure

1.3 The study is structured as follows:

Section 2 Provides a summary of the relevant planning policy background

Section 3 Contains a review of current and likely trends in the shopping industry at the national level which could influence the need and future demand for additional retail floorspace.

1.0 Introduction

Section 4	Provides an overview of shopping facilities within the District and in the wider sub-region, and assesses the levels of vitality and viability in the District's town centres. Reference is made to the results of the household shopping survey and previous Retail Study undertaken in 2001.
Section 5	Contains a quantitative assessment of convenience and comparison goods expenditure capacity using the results of the household survey as the basis for assessing existing shopping patterns.
Section 6	Includes a review of trends in the leisure industry and examines the need for additional leisure development in the District.
Section 7	Presents the recommended strategy for retailing and leisure uses in the District.
Section 8	Provides a summary of the main findings and conclusions.

2.0 Policy Background

National Policy

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

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

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

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

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

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

- Assess the need for new floorspace for retail and leisure uses, taking into account both quantitative and qualitative factors;
- Identify deficiencies in provision, assess the capacity of existing centres to accommodate new development;
- Identify centres where development will be focused;

- Define the extent of the primary shopping area and boundaries of existing centres;
- Identify sites in accordance with the sequential approach placing first preference on sites within town centres;
- Inform the review of existing Local Plan allocations;
- Inform spatial policies and proposals to promote and secure investment in deprived areas by strengthening and/or identifying opportunities for growth in existing centres, and to seek to improve local facilities; and
- Inform criteria-based policies for assessing proposals for retail development, including development on sites not allocated in the development plan documents.

The Regional Spatial Strategy for the West Midlands (formerly RPG11)

2.5 The West Midlands Regional Spatial Strategy (RSS) defines Birmingham / Solihull, the Black Country, Coventry and Stoke-on-Trent as the Major Urban Areas (MUA) and these are the main focus for major development, particularly housing and economic growth, over the period to 2021. In addition, the Strategy identifies 5 sub-regional foci for development beyond the MUAs (Worcester, Hereford, Rugby, Telford and Shrewsbury).

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

2.7 The RSS is currently under review following the recommendation for increased housing numbers in the Barker Review of Housing Land Supply. The Strategy should be adaptable to allow for the increased retail capacity that would accompany any large-scale expansion of the District's towns or any future new settlement that may be proposed.

Worcestershire Structure Plan

2.8 The Worcestershire Structure Plan was adopted by the County Council in 2001 and covers the period to 2011. Structure Plan policy focuses new retail development towards town centres but also recognises the importance of shops serving local day-to-day needs in rural settlements. The retail hierarchy within Worcestershire, as defined in the Structure Plan, is described in Section 4 of this study.

Wychavon Local Plan

2.9 The Wychavon Local Plan was adopted by the Council in June 2006. There are three defined built up areas in Wychavon District: Evesham, Droitwich Spa, and Pershore. There are no District Centres and just two Local Centres, one in Evesham and one in Droitwich Spa. There is also a Secondary Shopping Frontage defined in Broadway. Local Plan policy seeks to prevent the loss of retail and retail service uses in Secondary Shopping Frontages where this may affect its vitality and viability.

2.10 The Wychavon Local Plan discusses the previous retail study undertaken by Chase & Partners in 2001. The study described the District's town centres as being 'vulnerable' and their viability and vitality could be reduced by planned improvements to higher ranked retail centres.

2.11 Two sites are allocated in the Local Plan for retail development, both in Evesham and both allocated for non-food retail development in accordance with a need identified in the 2001 Retail Study. The first allocation is the site at Avon Street / High Street. This was allocated on the basis that the Post Office sorting office was due to relocate. However, it is now understood that the Post Office have no plans to vacate the site. The second site is the land at Bridge Street / Cowl Street / High Street / Oat Street. The Local Plan indicates that a development brief will be prepared for the site. No retail development has taken place and no development brief has been prepared to date.

3.0 Retail and Leisure Trends

Introduction

3.1 The retail and leisure sectors are characterised by continuous change, activity and progress. Changes within these sectors over recent years have manifested themselves in new forms of developments. These have resulted not only from innovations within the industries themselves but also from consumer demand, technological advances, and political intervention.

3.2 Within the last three decades, the UK has witnessed dramatic and continuing change in retail environments. The traditional town centre dominance of retailing has been challenged by innovative new retail formats in out-of-town locations and now commentators considering the impact of internet shopping.

3.3 These changes in the retail sector occur rapidly and the planning system is often slow to respond, resulting in planning policy lagging behind the changes. Since the 1970s there have been four broad waves of retail change within Britain.

- ***First Wave*** – occurred in the late 1960s to early 1970s, where food retailers moved to ‘out-of-centre’ locations operating from free-standing superstores and hypermarkets.

- ***Second Wave*** – occurred in the late 1970s to mid-1980s, where key bulky goods operators (e.g. DIY, furniture, carpets, electrical goods and motor accessories) moved to out-of-centre locations either in free-standing premises or with other operators as part of ‘retail parks’. This wave was also associated with the first large-scale retail warehouses. There was rapid growth of retail warehouses in the 1980s which slowed down in the 1990s due to the prevailing economic climate and more stringent planning legislation.

- ***Third Wave*** – occurred from the mid-1980s to early 1990s with other retailers in the non-bulky comparison goods sectors (such as clothing, footwear and toys) moving to out-of-centre locations, many to retail parks. This was the time when the large operators such as Marks & Spencer moved out-of-centre. This wave was also characterised by the rise of Regional Shopping Centres located close to motorway networks and serving very wide catchment areas (e.g. Meadowhall in Sheffield).

- ***Fourth Wave*** – occurred in the 1990s with the rise of warehouse clubs and factory outlet centres specialising in discounted goods. Retail complexes also emerged in many airport terminals.

3.4 A fifth retail wave has emerged since the turn of the century associated with increased use of personal computers in the office and at home. Online retailing (or e-tailing) has experienced rapid growth over this period, although it is still in its early stages. Services such as banking, estate agencies and travel agencies have also been affected. At this stage, it is difficult to draw firm conclusions on the implications for traditional 'high street' retailing over the coming years. However, changes in expenditure distribution have not gone unnoticed by retailers. The development and growth of e-tailing is discussed further below.

Expenditure

3.5 A key factor in the changing retail sector has been the changes in general expenditure, the last 30 years have seen rapid increase in average income (GDP per head). Nearly all households have telephones, fridges and TVs, cars and many have more than one car. Many of these goods are bought through shops and this has led to an increase in consumer retail expenditure. Other expenditure, for example foreign holidays, expenditure on the purchase and maintenance of cars, and savings and pension plans is not considered as retail expenditure, but trends affecting it can have considerable impact on town centres. Savings exerted considerable pressure on town centre floorspace through the demand from building societies, although this has now passed its peak with the amalgamation of societies, the rationalisation of their structure and e-banking. The growth of home ownership in the 1980s and the active housing market has increased demand for estate agents offices.

3.6 One of the big areas of expenditure growth has been in the leisure sector. Eating out and take away meals have become commonplace for many households, increasing the demand for restaurants, and take-aways and as well as forming one of the fastest growing sectors of food retailing. The growth in leisure spending has also encouraged investment by large companies, both in large-scale out-of-centre complexes (including multiplex cinemas, nightclubs and restaurants) and in the conversion of large town centre premises to public houses. More details of trends in the leisure sector are contained at Section 5. Government policy to encourage the evening economy of town centres has focused attention on the importance of leisure spending to town centres, although such uses should not undermine the predominant shopping function in the core shopping areas of larger town centres.

Retail Expenditure

3.7 Retail expenditure is in competition with other types of expenditure, and has not simply increased with average earnings. In the period 1960 – 2004/5 expenditure on food and drink (excl alcohol)

3.0 Retail and Leisure Trends

has declined from 30% of household expenditure to 16%, and expenditure on clothing and footwear from 10% to 5%. By contrast housing costs have increased from 9% to 18%, and transport, motoring and fares from 12% to 16%. Other expenditure items include recreation and culture, restaurants and hotels, miscellaneous goods, household goods, communication, education, and health, (source: ONS Family Spending, 2004/5, table 4.2).

3.8 MapInfo (formerly the Data Consultancy and, before that, URPI) has tracked retail expenditure back to 1964. It has risen from £2,274 per head in 1980 to £4,486 per head in 2004 (at constant 2002 prices), an increase of 97% over 24 years (source: MapInfo Information Brief 05/02). The annual growth rate is around 3.0% per annum between 1983 and 2004, although the pattern of growth year on year, has been uneven, reflecting the economic cycles.

Convenience Goods

3.9 The category of convenience goods covers food and drink, including alcoholic drinks, tobacco, newspapers, cleaning materials and matches bought through retail outlets. According to data from MapInfo, convenience goods expenditure has increased very slowly over the very long term (1964 to 2004) at an average annual rate of 0.1%. Expenditure on these goods was depressed in the 1990s following considerable growth in the late 1980s. However, the average annual growth in convenience goods expenditure between 1998 and 2004 is 0.8%. The local estimates of expenditure data used in this study are from Experian. Experian forecast that growth in per capita convenience goods expenditure will be around 0.6% per annum over the study period.

Comparison Goods

3.10 Comparison goods include clothing and footwear, do-it-yourself goods, household goods (such as furniture, carpets, soft furnishings and hardware) recreational goods (such as TVs, radios, video and DVD players, sports goods, toys, books and bicycles) and other goods like pharmaceuticals, toiletries and jewellery. Expenditure on these goods has grown faster than expenditure on convenience goods, at a rate of almost 5.2%p.a. over the same period 1983 to 2004, and 8.5%p.a. over the period 1998 to 2004 (Source: MapInfo). However, both Experian and MapInfo forecast that these growth rates cannot be sustained. For the period covered by this study, a forecast growth rate of 3.6% per annum has been used in respect of per capita comparison goods expenditure (from Experian).

3.11 Expenditure growth on different types of comparison goods can vary quite markedly. Audio-visual equipment, for example, has grown by almost 15.7%p.a. in the last 6 years whereas expenditure on household goods has been 6.7%p.a. Growth in sales of electrical equipment is likely to continue as new technologies and innovative products continue to emerge.

Social Trends

3.12 The growth in retail expenditure per head has given rise to a demand for additional retail floorspace. So has the modest but steady increase in the population – in England and Wales from about 49.6m in 1981 to 52.0m in 2001. However, how this pressure manifests itself as retail development is not consistent across the country and is determined largely by changes in social behaviour and the structure of the retailing sector itself.

3.13 Within regions, expenditure per capita will vary, as will growth or decline in the resident population. Within the regional context, however, the fortunes of individual town centres will depend on the population change within their catchment areas and their position within the retail hierarchy, rather than overall regional changes. Even in regions with declining population some towns will grow, while others decline. Often the impact of declining population will be greatest in district centres in larger conurbations.

3.14 The other social changes that are usually remarked upon in relation to retail patterns are the growth of car ownership and the substantial increase in the proportion of women working. The proportion of households with at least one car has increased from 52% in 1971, to 68% in 1991, and to 73% in 2001. This will increase the likelihood of a car being available for shopping trips.

3.15 The use of cars rather than public transport has altered the whole pattern of accessibility in towns and cities, favouring peripheral sites where there is less congestion and car parking is more convenient. It has also reduced the time/distance distinctive to travelling for goods and services, resulting in fewer but larger shopping centres. Retailers can rely on people travelling to them, rather than having to provide branches at a local level to reach customers.

3.16 The very marked increase in the number of women working, particularly working full time, and bringing up families is generally seen as creating an income rich/time poor environment for shopping which favours convenience over price competitiveness and hence encourages one-stop shopping, and bulk shopping trips.

3.17 It is probably easy to overestimate the impact of these changes and there remain a substantial number of pensioner households and households without cars. Nevertheless, the pattern of relatively infrequent (usually weekly) bulk food shopping trips with additional top-up shopping in between, appears to be well established from the large number of household shopping surveys that have been carried out as part of retail impact studies. The growth of 'convenience stores', particularly at petrol filling stations, is another manifestation of this trend.

3.18 The pattern of non-food shopping trips is more complicated and assessed less frequently than convenience goods shopping patterns. The emergence of shopping as a leisure activity has been much trumpeted, and the close proximity of retail and leisure facilities in some regional shopping centres and large retail parks is evidence of this. These centres attract coach trips from far afield. Indeed, window-shopping has long been an established pastime, and daily food shopping is often used as an occasion for social interaction. Nevertheless, the relative success of attractive, historic shopping centres and centres containing purpose-built attractions suggest that shopping is often combined with more general leisure trips. Purchases may be impulse buys, but equally the decision to go to a particular centre may be based on a combination of its retail offer and other attractions.

E-Commerce

3.19 There has been considerable media attention devoted to internet shopping in recent times. It has been reported in the media that as 'High Street' sales were lower than expected over the Christmas 2005 and New Year period, internet-based sales have been buoyant. However, as previously noted, it is still not clear the extent to which Internet shopping will replace traditional shopping.

3.21 In terms of convenience goods, the main foodstore operators have set up on-line shopping facilities. Tesco Direct, for example, has steadily increased its geographical coverage and has extended the range on offer through its online store to include books and household goods.

3.22 However, doubts remain about how popular the Internet will be with food shoppers. While it may suit the purchase of basic standardised groceries such as tins or frozen products, it is likely that there will always be a significant number of customers who will want to choose their own fresh products and to browse the product range in goods sectors, like delicatessens, where the product offer changes rapidly.

3.23 Within the comparison goods sector Internet shopping will broadly offer the same service as catalogue and teleshopping. It is likely to prove popular for goods like books and CDs, but even with these goods, the inability to inspect the goods or satisfactorily test the selection is seen as limiting. For fashion goods, catalogue shopping, mail order and teleshopping are slowly claiming a larger market share. Internet shopping adds to the efficiency of the process rather than overcoming its disadvantages – particularly in seeing and trying on clothes. Remote sales rely on home delivery, which is, as a result of the increasing numbers of women who work, becoming a disadvantage in itself.

3.24 The disadvantages of home delivery do not apply to the delivery of many services, and telephone and Internet services have already become significant in banking and insurance services. The same trends are important in travel bookings and, to some extent, estate agency. This has led or is likely to lead to continued branch closures, as is being experienced in the banking sector at present. It seems reasonable to conclude that the Internet and telephone services will have a significant impact on the amount of activity in high streets in the coming years, but will not replace them as places for shopping, business and entertainment.

3.25 According to Forrester Research, 'net-influenced' sales represent three times as much revenue as actual online sales. In other words, many people prefer to research products and prices online but then go to the high street to actually buy the goods. Forrester Research estimate that net-influenced sales in the UK will be worth approximately £22bn (7%) by 2007. The Interactive Media in Retail Group (IMRG) who represent on-line retailers claim that internet sales are matched by net-influenced sales. IMRG suggest that in 2006, internet sales will represent £30bn or 10% of all retail sales and a further £30bn of high street sales will be 'influenced' by people browsing on the internet.

3.26 In any event, shopping online <u>is</u> a factor, alongside other forms of non-store business. Experian consider that internet shopping is still in the 'take-off' phase of its market penetration but, once shopping patterns are established and settled, internet sales will eventually plateau at a reasonably constant market share of overall spending. Experian's latest estimate of retail sales not taking place in stores is 5.3% in respect of comparison goods and 1.5% in respect of convenience goods. The results of the household survey indicate that in the study area as a whole non-store comparison goods spending was 7.1% and for convenience goods it was 1.3%. The comparison goods figure is a little higher than the Experian equivalent which is for 2003 but, given the forecast growth in such spending as a proportion of total spending, the higher figure is to be expected. In terms of different types of comparison goods, the survey revealed the following proportions of non-store spending: *(overleaf)*

Clothing / Shoes / Fashion:	4.3%
DIY Goods:	0.5%
Furniture / Floor Coverings:	2.4%
Small Electrical:	7.6%
Large Electrical:	7.0%
Other Non-Food Goods:	11.0%

3.27 Experian estimate that convenience goods expenditure which is not spent in stores will increase to around 5.2% in 2010 before levelling out by 2013 at around 6.5%. They estimate that comparison goods non-store spending will also continue to increase, levelling out at around 12.3% or 12.4% in 2012.

3.28 However, Experian have also produced forecasts of special forms of trading based on a 'weaker-case scenario' where internet shopping in particular does not grow at such a rapid rate over the next 5-8 years. A lower growth rate, Experian explain, could emerge if forecasters have underestimated current internet sales because of the time it takes for reliable data to be collected and analysed.

3.29 If this is the case, internet growth would peak at a lower level and a little earlier than predicted. In the case of convenience goods, non-store sales would level out at 4.3% in 2011. For comparison goods, the weaker-case scenario involves non-store sales levelling out at around 8.6% or 8.7% by 2010.

Retail Industry Trends

3.30 The emergence of new forms of retailing in the late 1980s and 1990s are well known and the so-called four waves have previously been outlined in this section.

3.31 The number of superstores (foodstores with more than 25,000sq.ft. sales floorspace) increased from 457 in 1986 to 1,102 in 1997, and their share of grocery spending increased from 29.9% in 1987 to 53.7% in 1996. This occurred at a time when the grocery spending per head increased very slowly. In contrast, the number of independent grocers fell from 116,000 in 1961 to 20,000 in 1997 (Figures quoted from the Environment, Transport and the Regional Affairs Committee Second Report Dec 1999). The Institute of Grocery Distributors Directory indicates that the number of superstores had risen further from 1,102 in 1997 to 1,280 in 2003.

3.0 Retail and Leisure Trends

3.32 The move towards car borne shopping and the advantages for peripheral, out-of-centre sites for this are well known. The move started in convenience goods retailing where large stores could offer sufficient goods and facilities to attract customers without town centre facilities being available. Increasingly over recent years, these superstores have expanded into other in-store activities and services such as dry cleaning, coffee shops and the sale of financial services. It has now become commonplace for the larger foodstores to sell comparison goods like mobile phones and televisions/DVD players at discounted prices in addition to the clothing and fashion goods sold by some. The take-over of Asda by WalMart, specialists in mixed-goods retailing, has led to others following the trend to a greater degree.

3.33 The next development was the movement of electrical, furniture and floor covering retailers to out-of-centre locations. These have tended to cluster together in retail warehouse parks, because they can benefit from ‘incidental’ purchases by customers of neighbouring stores. Also, the proliferation of individual free-standing retail stores often results in customers having difficulty remembering which store is where. Good visibility from main vehicular routes remains a pre-requisite in identifying retail locations. For retailers, warehouse units offer the possibility of stocking bulky goods and a wider range of normal goods than conventional units. Also, warehouses often allow retailers flexibility in terms of re-arranging the showroom area without contending with structural walls and pillars.

3.34 The advantages for retailers of out-of-centre locations are clearly not restricted to retailers of bulky goods; a number of clothing and footwear retailers (e.g. Next and Marks & Spencer) have shown willingness to trade from out-of-centre locations realising the benefits identified above. In looking for new sites, DIY operators also now prefer a retail warehouse location (or a site adjacent to a food superstore) above free-standing locations.

3.35 Factory Outlet Centres (FOC) developed rapidly in the 1990s. In the past it was common to find small shops attached to places of production/manufacture selling end-of-line, out-of-season, or slightly damaged products. Other routes for disposal of such goods have been through markets, and exports to eastern European countries. These alternatives are declining. There are now FOCs in most parts of the country, both purpose-built as out-of-centre shopping locations and in converted buildings. A FOC has recently been granted planning permission by the Secretary of State as part of the Gloucester Quays redevelopment. Although the industry may seek to operate what is effectively a two-tier pricing structure, there is clearly likely to be considerable substitution of goods between the two and limits on expenditure and usefulness means that some of the money spent on FOC goods, will not be spent in the high streets.

3.0 Retail and Leisure Trends

3.36 Warehouse clubs, like Costco, which sell a wide range of discounted goods to members from very large premises, have failed to spread widely in the UK. A court case established that, in terms of planning law, warehouse clubs were not shops. However, Government policy on retail development advises that in policy terms they should be treated as if they were retail businesses.

3.37 More recently, the largest supermarket retailers have been concentrating on acquiring smaller convenience stores. Tesco and Sainsburys have been active in the convenience sector over recent years and it is likely that Asda Wal-Mart will soon join them. Sales at Tesco convenience stores in particular are rising so fast that analysts expect sales at stores trading under the fascia Tesco Metro (in town centres) or Tesco Express (at local stores or petrol filling stations) will surpass sales at Spar, the UK's current leading operator in the convenience store sector. Tesco sales in this sector are already alongside Musgarve's (who own Londis and Budgens).

3.38 The Association of Convenience Stores has warned that the larger supermarket chains are using their considerable influence and purchasing power to force independent traders out of business. In November 2005, the Office of Fair Trading was ordered by the Courts to review its earlier decision that the supermarket's increasing dominance of the grocery market should not be referred to the Competition Commission for a full enquiry. The OFT is now carrying out the study focussing in part on the way retailers seek to influence competition through the planning system.

3.39 However, it should be noted that the convenience store sector is more diffuse than the larger food superstore market. Spar, the current leaders in the sector, has just 5.6% of sales, whilst Tesco and Musgrave have 5.4% each, and the Co-operative Group a further 5.2% (Source: Verdict Research). This is compared with Tesco's 30.5% market share of the grocery sector overall (Source: TNS market research).

Retail Concentration

3.40 The retail industry is becoming concentrated in fewer, larger firms with a greater share of the market. These concentration levels have been achieved partly through mergers, but many of the leading companies have also captured increased market share through organic growth. This is particularly so in the food sector, where the market share of the top five operators is 79%, and the top ten over 90%. Increased size can produce more favourable purchasing prices from suppliers and economies of scale arising from distribution logistics, and the spread

of advertising costs. Advertising and branding is increasingly important, with retailers developing their own brand products and their own brand image. This brand strengthening allows many of them to trade more easily from freestanding out-of-centre locations.

3.41 These changes give national multiples considerable advantages, and their presence in town centres is an important measure of the success of town centres. Those towns which fail to attract such stores will loose market share. At the same time, the need for independent shops to give town centres ‘character’ is becoming recognised (to avoid the label of ‘clone town’). People will want to shop in larger towns with greater choice and retailers can increasingly rely on people travelling to these shops by car, rather than having to provide shops locally. There is thus a tendency for larger towns to have strong retailer interest and to support new development, while smaller, traditional market towns decline.

Summary

3.42 The retail and leisure sectors are characterised by continuous change. Growth in retail expenditure fluctuates. In terms of comparison goods, after a period of relatively high growth in expenditure, more modest levels of growth are expected in the short to medium term. Expenditure growth in respect of convenience goods is historically lower than the equivalent for comparison goods and this is expected to continue.

3.43 Increasing car ownership has led to significant levels of retail and leisure floorspace being constructed in out-of-centre locations. To a degree, the extent of out-of-centre development has, in turn, led to increased dependence on the car.

3.44 E-commerce and shopping online is a factor alongside other forms of non-store activity. Analysts suggest that non-store shopping will continue to increase into the next decade which, inevitably, will divert some trade from ‘high street’ stores.

3.45 Retailing is becoming increasingly concentrated in fewer, larger firms. National multiples have significant advantages over independent traders but, whilst their presence in a town centre is generally acknowledged to be a sign of success, it is important to recognise that a strong independent sector gives a centre character and broadens it appeal.

4.0 Existing Shopping Facilities

Introduction

4.1 This section of the study provides an overview of the shopping facilities available to residents of, and visitors to, Wychavon. In particular the section focuses on facilities in the three main towns of Evesham, Droitwich Spa and Pershore. First, the regional and sub-regional shopping hierarchy is examined in order to understand the position of town centres within the District relative to larger competing centres further afield. Second, there is a review of facilities in the three town centres within the District, and out-of-centre provision including freestanding foodstores and non-food retail warehouses. The assessment of the shopping facilities in this section is primarily based on DPDS fieldwork, information from Wychavon District Council including the Wychavon Retail Monitor, established data sources including Management Horizons, the Valuation Office, and Experian, and the results of the specially commissioned Household Telephone Survey.

The Household Telephone Survey

4.2 To gain a better understanding of shopping patterns in the area, a household telephone survey was commissioned from NEMS and conducted in July 2006. The survey area was defined in consultation with officers at the District Council, and having regard to the results of the household survey carried out during 2001 as part of the previous retail study undertaken by Chase & Partners. The survey area reflects the likely area of influence of the three main town centres in Wychavon District.

4.3 The survey involved a sample of 1,000 households within 17 postcode zones. A plan showing the geographic extent of the survey area is contained in Appendix A. For the purposes of analysis the 17 zones were grouped into 3 larger zones based, geographically, around the three main towns in Wychavon: Evesham, Droitwich Spa and Pershore. The three zones are also shown on the plan at Appendix A and referred to as the 'Evesham Zone', 'Droitwich Zone', and 'Pershore Zone' in this study.

4.4 The questionnaire for the survey was designed to gain information on shopping patterns which would not only inform the assessment of retail expenditure capacity but also provide valuable information on the views of visitors to the main town centres in the District. Reference is made to the results of the survey in this section. The full results are contained in Appendix B.

4.0 Existing Shopping Facilities

Regional Shopping Hierarchy

4.5 The *West Midlands Regional Spatial Strategy, Technical Paper 5 – Quantitative Need in Retail and Leisure Sectors* identifies a retail hierarchy defined on the basis of comparison goods turnover. The Study focuses on the 26 centres with the highest comparison goods turnovers (of around £100m and above). Birmingham is at the top of the hierarchy, followed by Merry Hill Shopping Centre, Coventry, Hanley and Wolverhampton. None of the centres in Wychavon appear in the hierarchy; the nearest centres appearing are Worcester (7th, £439m), Redditch (15th, £250m), Kidderminster (17th, £213m), and Stratford upon Avon (18th, £212m).

Sub Regional Shopping Hierarchy

4.6 The Worcestershire Structure Plan under Policy D.31 identifies the following retail hierarchy within the County:

Figure 4.1: Policy D.31 Retail Hierarchy

Retail proposals in the following centres should be of a scale which is appropriately related to the roles of those centres and should retain and reinforce the following retail hierarchy:

Worcester City	Sub-Regional centre
Kidderminster	Major County centre
Redditch	Major County centre
Evesham	Minor County centre
Bromsgrove	Minor County centre
Malvern	District centre
Droitwich	District centre
Pershore	Minor District centre
Stourport	Minor District centre

Source: Worcestershire Structure Plan 1996 -2011, Adopted Plan June 2001

4.7 Figure 4.1 shows that, in terms of the centres within Wychavon District, Evesham is the highest placed centre and defined as a ‘Minor County Centre’. The Structure Plan acknowledges that Evesham performs an important retail role and serves a wide catchment area. Evesham is above Droitwich Spa (a ‘District Centre’) and Pershore (a ‘Minor District Centre’) in the hierarchy. Worcester (Sub-Regional centre) is at the top of the county’s shopping hierarchy, according to the Structure Plan, and both Kidderminster and Redditch (‘Major County Centres’) are above Evesham.

4.0 Existing Shopping Facilities

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

4.9 Figure 4.2 below identifies the centres within Wychavon District, which appear in the national rankings, and the main competing centres in the wider sub-region. The previous rankings from 2000/2001 are included for reference.

Figure 4.2 The MHE shopping Index: Wychavon District and the Surrounding Area

Centre	MHE Rank 2003-04	MHE Rank 2000-01
Birmingham	6	6
Bristol	23	18
Cheltenham	24	24
Bath	28	30
Swindon	47	58
Worcester	54	53
Brierley Hill, Merry Hill	61	49
Gloucester	89	65
Cribbs Causeway, Bristol	100	89
Kidderminster	156	169
Redditch	165	165
Stratford upon Avon	170	145
Evesham	**262**	**269**
Dudley	301	249
Bromsgrove	336	282
Tewskesbury	565	572
Stourport on Severn	773	775
Malvern	800	699
Droitwich Spa	**829**	**739**

Source: Management Horizons Europe

4.10 Two Wychavon town centres appear in the MHE rankings: Evesham (ranked 262nd) and Droitwich Spa (829th). Neither Pershore, nor any other centre within Wychavon District, are large enough to feature in the rankings. In terms of the changes over recent years, it is noted that Evesham has moved up marginally in the rankings since 2000/01, whereas Droitwich Spa has actually fallen 90 places down the MHE Index.

4.11 Towns and cities in the sub-regional hierarchy which are outside Wychavon District influence shopping patterns within the District. The household survey indicates that Worcester and Cheltenham have the most significant influence on comparison goods shopping patterns within the study area. The following proportions of comparison goods expenditure generated within the study area are spent in Worcester and Cheltenham:

	Worcester	Cheltenham
Clothing & Footwear	30%	14%
DIY Goods	12%	5%
Furniture & Floor Coverings	25%	10%
Large Electrical Goods	28%	6%
Small Electrical Goods	21%	6%
Other Non-Bulky Goods	28%	9%

4.12 Other towns and cities in the sub-regional hierarchy have less influence on shopping patterns in the study area, but the combined draw of destinations such as Stratford-upon-Avon, Redditch, Birmingham, Kidderminster and Bromsgrove is notable.

Shopping Facilities in the Study Area

4.13 Having considered the three main town centres in Wychavon District in the context of the wider sub-regional hierarchy, this section now turns to a detailed assessment of shopping provision within the study area.

4.14 Each of the three main towns in the Wychavon District – Evesham, Droitwich Spa, and Pershore – is addressed in turn and the town centres are assessed having due regard to the key indicators of vitality and viability set out in paragraph 4.4 of PPS6. An overview of any out-of-centre provision is also provided.

Visitor / User Perceptions

4.15 Respondents in the household survey were asked a series of questions about the town centres they used. Visitors and users were asked to rate the centre in relation to a range of factors including range and choice of non-food shops, the quality of the environment, and accessibility by car. Respondents were given the option of rating centres as 'very good', 'good', 'average', 'poor', or 'very poor'. For the purposes of analysis, these responses were given a score of 2, 1, 0, -1, and -2 respectively and an average score was then calculated. Therefore, a score above 0 means that the centre was rated above average and the higher the score, the higher the centre was rated. A score below 0 means that the centre was poorly rated. The average scores are referred to in the following assessment of the three main town centre.

Evesham

4.16 Evesham is an ancient market town situated in the south of Wychavon District, roughly equidistant between Worcester, Cheltenham and Stratford-upon Avon.

4.17 The historic town centre is divided by the River Avon. The Primary Shopping Frontage, as defined in the Wychavon Local Plan, is based around Bridge Street, High Street, Market Place and the Riverside Shopping Centre, all to the west of the river. The Secondary Shopping Frontage, as currently defined, extends further to the north on High Street, southwards along Vine Street and Merstow Green, and eastwards over the bridge to Port Street.

4.18 Evesham town centre is the largest centre in Wychavon District, both in terms of the number of retail and service units (301) and the amount of floorspace (approximately 46,000sq.m.gross).

Retail Composition

4.19 Figure 4.3 overleaf shows the current composition of the town centre and the changes in composition since 2001.

4.20 The overall number of units available in Evesham town centre has fluctuated slightly since 2001. The comparison sector remains the most significant, occupying 142 units or 47% of the overall number of units. There has been a slight fall in the number of comparison units since 2001, when the sector occupied over half of the units available.

Figure 4.3: Retail Composition of Evesham Town Centre

	No. of units 2001	No. of units 2004	No. of units 2006
Convenience	25 (9%)	25 (8%)	25 (8%)
Comparison	149 (51%)	149 (48%)	142 (47%)
Services	86 (29%)	96 (31%)	100 (33%)
Vacant	33 (11%)	37 (12%)	31 (10%)
Miscellaneous	n/a (0%)	1 (0%)	3 (1%)
Total	293 (100%)	308 (100%)	301(100%)

Source: Chase & Partners (2001), Experian (2004), DPDS/Experian (2006)
Figures may not add due to rounding
'Miscellaneous' category comprises post offices, employment agencies and information entres
'Miscellaneous' units included in 'Vacant' figure in 2001 data

4.21 Key national multiple comparison goods retailers include Argos, Boots, Burton, Clarks, Currys Digital, Dorothy Perkins, New Look, Next, Superdrug, WH Smith and Woolworths. Other multiples include the following:

Clinton Cards
Lloyds pharmacy
Blockbuster
Stead & Simpson
F Hinds
Birthdays
Specsavers
Contessa
Carphone Warehouse
Sharps Moben Dolphin
Game
Phones 4 U
Rosebys
Millets
Dolland & Aitchison
Peacocks
BeWise
Adams childrenswear
Edinburgh Woollen Mill
Priceless Shoes
Body Shop

4.22 Evesham town centre also contains Powerhouse and Allied Carpets, retailers often located in retail warehouse parks rather than town centres.

4.23 Complementing the national multiples are a large number of independent retailers of comparison goods. The offer from these retailers is broad and stores sell clothing, shoes, carpets, books, household furnishings and goods, gardening goods, sports equipment, toys, gifts, stationary, pet accessories, toiletries and pharmaceutical products, glasses and contact lenses, computer equipment, and jewellery.

4.24 According to the household survey, 31% of residents in the Evesham Zone use Evesham town centre for clothing, shoes and fashion goods. 26% visit Cheltenham, 13% visit Stratford upon Avon, and 9% visit Worcester. These results can be compared with the results from the household survey conducted in 2001 as part of the previous study. The comparison is shown in Figure 4.4 below:

Figure 4.4: Clothing, Footwear and Fashion Shopping Destination

	2001	2006
Evesham	26%	31%
Cheltenham	43%	26%
Worcester	12%	9%
Stratford upon Avon	11%	13%
Internet / Mail Order	4%	5%
Other destinations	6%	16%

4.25 Whilst destinations outside the District still attract a significant proportion of the District's residents (and their expenditure) for clothing, footwear and fashion goods, Figure 4.4 shows that Evesham appears to have increased its market share since 2001 predominantly at the expense of Cheltenham and Worcester. Stratford upon Avon has also increased its market share of fashion expenditure drawn from the Evesham zone.

Figure 4.5: Other Non-Bulky Non-Food Goods Destination

	2001	2006
Evesham	57%	49%
Cheltenham	20%	17%
Stratford upon Avon	7%	8%
Worcester	5%	7%
Internet / Mail Order	6%	10%
Other destinations	5%	9%

4.26 Figure 4.5 above sets out further results of the household survey. It indicates that Evesham town centre has lost market share in terms of other non-bulky non-food goods (e.g. books, jewellery, CDs, DVDs, toys and gifts), falling from 57% to 49%. Stratford upon Avon and Worcester have increased their market shares in the Evesham Zone, and the use of the Internet for this type of shopping has also increased. It is also relevant to note that the household survey suggests that over 4% of the Evesham Zone residents usually purchase non-bulky, non-food items in the out-of-centre Tesco store in Evesham. The store did not appear in the 2001 survey.

4.27 Whilst there are 142 comparison goods shops in Evesham town centre, the range and choice of non-food shops in the town centre does not appear to be well-perceived by residents, according to the household survey. The town centre scored just 0.11 in this respect. Indeed, 13% of those who used Evesham town centre indicated that they disliked the town centre because there was not enough choice, and 5% disliked the ‘poor quality shops’. 27% of respondents indicated that a broader range of shops would encourage them to visit more often and 8% said that they would visit more often if there were better or more niche shops.

4.28 The market place at the northern end of the town centre on High Street contains stalls predominantly selling comparison goods and this provides variety in the retail offer in the town centre. The household survey indicates that 48% of people in the Evesham zone and 25% of residents in the study area as a whole had used the market in the proceeding 2 months.

4.29 Figure 4.3 shows that the number of units occupied by the service sector has been increasing steadily since 2001, from 86 to 100. A third of the available units in the town centre are now dedicated to services. There are many cafes, restaurants and take-away outlets in the town centre, particularly on the High Street and the Waterside. Most are independently run and, with the exception of Ask, Costa Coffee, and Subway there are very few ‘chain’ restaurants or outlets.

4.30 Other services in the town centre include banks and building societies, travel agents, estate agents, hairdressers and beauty salons.

4.31 Overall, the household survey indicates that visitors are generally happy with the level of service provision in Evesham town centre and it received a score of 0.98.

4.32 Figure 4.3 indicates that the convenience sector’s presence in the town centre has remained steady in Evesham town centre. It shows that there are 25 convenience stores in the town

4.0 Existing Shopping Facilities

centre at the time of the last survey in 2006, the same figure as 2001 and 2004. However, since 2004, Somerfield have moved from Swan Lane into the former Kwik Save store on the High Street resulting in the net loss of one supermarket in the town centre.

4.33 Somerfield is the largest convenience store and has a net sales area of almost 1,200sq.m. Marks & Spencer Simply Food opened in 2005, occupying a large unit within the Riverside Shopping Centre, formerly occupied by the Co-op, and Budgens before that. An Iceland foodstore is situated on High Street. These three supermarkets provide visitors to Evesham town centre with a choice of stores, and this is reflected in the results of the household survey in which the town centre scored 0.67 in terms of the choice and quality of supermarkets. However, the town centre lacks a large-scale food superstore offering a broad range of goods to compare with the two out-of-centre superstores in Evesham (Tesco at Worcester Road and Morrisons at Four Pools). The convenience goods offer in the town centre is supplemented by a number of smaller stores including bakers, butchers, greengrocers, off licences, newsagents, and stores selling confectionery (Thorntons) and health foods (Julian Graves).

4.34 Figures derived from the household survey results suggest that around 12% of convenience goods expenditure generated in the Evesham Zone is spent in stores in Evesham town centre. This compares to around 70% which is spent in out-of-centre stores in Evesham, mainly in the Tesco and Morrisons stores, and demonstrates the attractiveness of these larger stores.

Vacant Units

4.35 Figure 4.3 sets out the information on the number of vacant units in Evesham town centre since 2001. Vacant units increased between 2001 and 2004 to 37 but the number has declined to 31. Vacancies at the time of the last survey represented around 10% of the overall number of units in the town centre, which is in line with the national average for town centres according to Experian.

4.36 In terms of distribution, there are very few vacancies on the Primary Shopping Frontages along High Street and Bridge Street. However, at the time of the last survey in July 2006, elsewhere in the Primary Shopping Frontages, there were five vacant units at the western end of the Riverside Shopping Centre and two more in Market Place.

4.37 The majority of the remaining vacancies are in more peripheral areas of the town centre. For example there are four vacancies at the northern end of the High Street, three in Cowl Street, and eight in Port Street. The large unit formerly occupied by Somerfield on Swan Lane remains vacant.

4.0 Existing Shopping Facilities

Other Uses in the Town Centre

4.38 In addition to retail and service uses, Evesham town centre attracts visitors for a number of other reasons. There is a library and information centre, pubs and clubs, a community centre, and businesses such as accountants or solicitors. However, there are few large office buildings and little opportunity for medium-sized companies to establish themselves within the town centre. Leisure facilities in the town centre and elsewhere in Evesham are discussed in Section 7.

Environmental Quality

4.39 The town centre contains many fine buildings of architectural or historical interest; the area around Market Place, in particular, boasts a number of black and white, timber-framed buildings, and there are some impressive historic frontages on High Street, Bridge Street and Port Street.

4.40 There are wide pavements on High Street with mature trees but the environment is dominated by tarmac and car parking. The majority of Bridge Street is pedestrianised and the Riverside Centre has recently been refurbished and provides a safe, traffic-free environment with shelter from inclement weather.

4.41 The environmental quality of the town centre is marred considerably by the traffic on High Street and, in particular, the frequent congestion. Noise and fumes in this part of the town centre detract from an otherwise pleasant shopping environment, and to some extent the Port Street area too where narrow road and pavements widths add to the impact of the traffic. Overall, Evesham town centre scored 0.79 for its environmental quality in the household survey.

4.42 Evesham town centre has benefited from a significant amount of investment over recent years, and many projects delivered by the Evesham Market Town Partnership have focused on improving the quality of the town centre environment. Specifically, new planters, information cabinets, and pedestrian signage have been installed and the 'gateways' into the town centre along Port Street and Abbey Road have been improved. In addition, proposals for environmental improvements and regeneration of the High Street are being developed which, if implemented, would help to alleviate the problems associated with traffic congestion identified above.

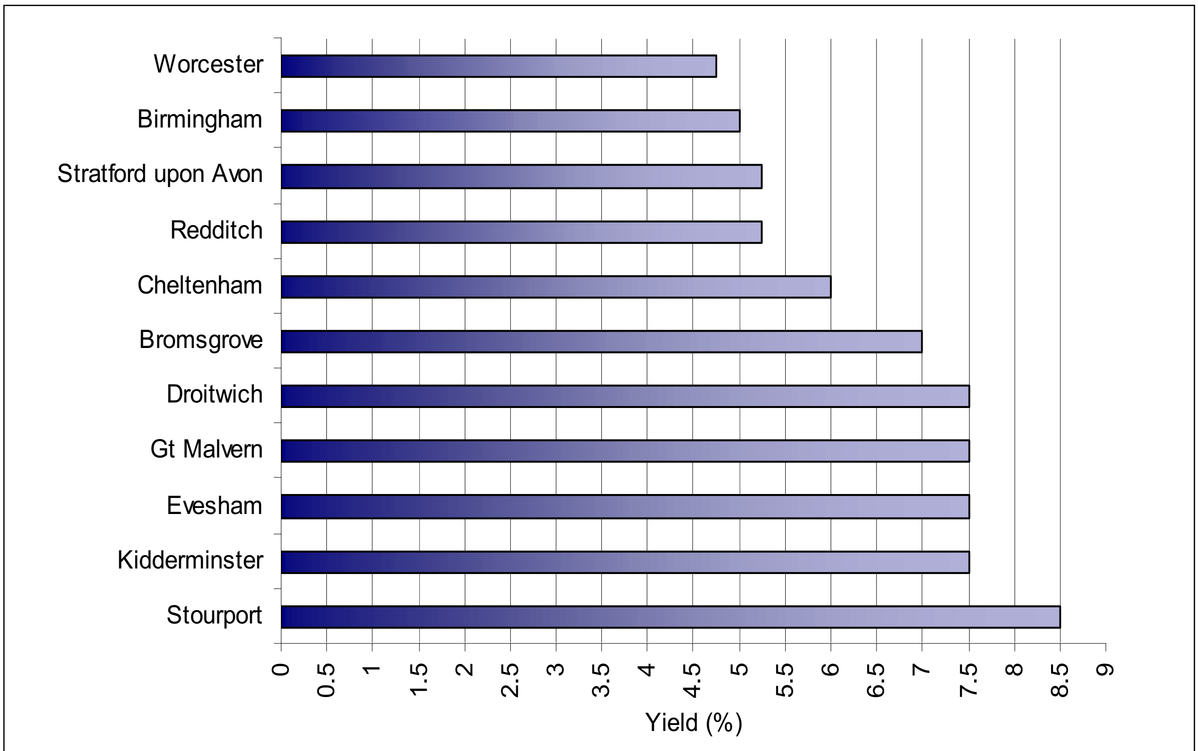
Footfall

4.43 Footfall data has been collected on an annual basis by the District Council since 1995. Full details are contained in the Wychavon Retail Monitor. The highest levels of footfall are typically recorded close to the junction of Bridge Street and High Street, and pedestrian flows steadily diminish as the count points become more distant from this point. Two of the most important points to note from the data are that firstly the general trend since 2000 appears to be that footfall is decreasing, and secondly, count points on the eastern side of the River Avon record the lowest levels of footfall.

Commercial Yields

4.44 The yields expressed in Figures 4.6 and 4.7 below are 'all risk yields' calculated by dividing the annual rent, as though it had been received as a single sum at the year end, by the capital value or sale price of the property. The 'all risk yield' is a simple benchmark which the property market uses to assess the comparative attractiveness of different shopping centres. It is the ratio of rental income to capital value and is expressed in terms of the open market rent of a property as a percentage of the capital value.

Figure 4.6: Commercial Yields, 2006



Source: Valuation Office

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

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

Figure 4.7: Commercial Yields (%), 1999-2006

Towns	1999	2000	2001	2002	2003	2004	2005	2006
Cheltenham	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00
Worcester	4.50	4.50	4.75	4.75	4.75	4.75	4.75	4.75
Birmingham	5.00	5.00	5.00	5.00	5.00	4.75	5.00	5.00
Evesham	7.50	7.50	7.50	7.50	7.50	7.50	7.50	7.50
Redditch	5.25	5.25	5.25	5.25	5.25	5.25	5.25	5.25
Bromsgrove	8.00	8.00	8.00	8.00	8.00	8.00	8.00	7.00
Droitwich Spa	7.50	7.50	7.50	7.50	7.50	7.50	7.50	7.50
Gt Malvern	9.50	9.50	8.50	7.50	7.50	7.50	7.50	7.50
Stratford Upon Avon	5.25	5.25	5.25	5.50	5.50	5.50	5.50	5.25
Kidderminster	8.00	8.00	8.00	7.75	7.50	7.50	7.50	7.50
Stourport	9.50	9.50	9.50	9.25	9.25	9.25	9.25	8.50

Source: Valuation Office (first valuation of the year)

4.47 Figures 4.6 and 4.7 above illustrate that Evesham's yield has remained stable over the past 7 years but there are a number of competing centres in the sub-region, which are regarded as safer investment locations than Evesham. Whilst it would be expected that Birmingham, Worcester and Cheltenham have comparatively low yields due to the size of these centres and their catchment areas, it is noted that smaller centres including Stratford-upon-Avon, Redditch and Bromsgrove all have lower yields than Evesham. Evesham's 7.5% yield is the same as Droitwich Spa, Great Malvern and Kidderminster. Overall, it is considered that the yield in Evesham is an indication of relatively low investor confidence.

Retailer Requirements

4.48 A list of requirements retail and leisure premises in Evesham, as shown on the Focus database, are contained at Appendix C. The database shows 37 requirements comprising 20 from comparison goods operators, 6 from convenience stores, 10 from the service sector and one D2 user. 24 of the requirements are for prime shopping frontage property and a further 7 would accept appropriate secondary frontage property.

Accessibility

4.49 Pedestrian movement around the town centre is relatively easy. The majority of Bridge Street and Market Place is pedestrianised, and the pavements on High Street are reasonably wide. The High Street itself is heavily trafficked and can present a barrier to movement but there are three crossing points. The town centre is reasonably level with just a slight incline on Bridge Street as one approaches the bridge over the River Avon. Overall, the town centre scored well (0.97) in the household survey in terms of its ease of movement around the centre.

4.50 Evesham has the following public car parks serving the town centre:

Riverside multi-storey	260 spaces
Oat Street	160 spaces
Swan Lane	97 spaces
Merstow Green (south)	91 spaces
Merstow Green (north)	150 spaces
Northwick Road (Port Street)	26 spaces

Source: Experian

4.51 In addition to the above, there are a series of small short-stay unloading spaces off the High Street and some limited on-street parking on peripheral town centre roads. In terms of distribution of car parking provision, it would seem that the eastern part of the town centre (east of the River Avon) is relatively poorly served.

4.52 Turning to the household survey results, Evesham town centre scored 0.76 for accessibility by car but only 0.13 for the adequacy of parking arrangements. 11% of visitors disliked the town centre due to its ‘traffic problems’ and 7% mentioned the lack of, or cost of, parking. 9% of visitors indicated that more parking would encourage them to visit more often.

4.53 The major bus stops serving the town centre are situated on High Street. There are regular services to Stratford, Redditch and Worcester (serving towns and villages on route) and less frequent services to locations such as Cheltenham, Tewkesbury, Honeybourne and Chipping Camden. The town centre received a score of 0.19 for accessibility by public transport in the household survey.

Summary of Evesham Town Centre

4.54 Evesham has a reasonably attractive town centre and, with over 300 retail and service units, it is the largest centre in the District. Almost half of the units are occupied by shops selling comparison goods. However, generally speaking, visitors to the town centre expressed disappointment at the choice of shops and significant number of respondents in the household survey indicated that they would visit more often if there were more, or better, shops.

4.55 Three of the national supermarket chains are present in the town centre, complemented by a range of smaller convenience stores, but there are no food superstores in the town centre. Service provision is generally strong although there are relatively few A2 uses (financial and professional services).

4.56 Evesham town centre is accessible by public transport but there is some visitor dissatisfaction in terms of the adequacy of parking arrangements. The vacancy rate is in line with the national average for town centres and surveys indicate that, in terms of pedestrian activity, footfall rates are generally in decline since 2000.

4.57 Overall, it is considered that Evesham town centre is a reasonably vital and viable centre having regard to the relevant indicators but there is some cause for concern on a number of factors including yields, declining footfall levels, visitor dissatisfaction, and the level of expenditure leakage to other centres. Without improvements in the retail offer, levels of expenditure leakage are likely to increase following pipeline developments in competing centres such as Worcester and Cheltenham. The part of the town centre to the east of the River Avon displays the lowest levels of vitality and viability.

Out-of-Centre Retail Provision in Evesham

4.58 The amount of retail floorspace in out-of-centre locations in Evesham has grown significantly in the past 5 years. In terms of convenience goods, the town has a Tesco store (4,265sq.m.net) on Worcester Road, a Morrisons store (2.880sq.m.net) in the Four Pools area of the town, and a Co-op store (187sq.m.net) on Davies Road. As mentioned previously, the Tesco and Morrisons stores attract the majority of expenditure generated in the Evesham zone. Tesco has a market share of 45% and Morrisons 24% in this zone.

4.59 Turning to comparison goods, the majority of out-of-centre floorspace is located at Four Pools in the southern part of the town. Retailers in the Four Pools area are as follows:

B&Q	Currys
Focus	Halfords
Wickes	Jewsons
Countrywide	

The former Countrywide store on Worcester Road is vacant.

Droitwich Spa

4.60 The town of Droitwich Spa is situated in the northern part of the District and dates back to the Bronze Age. The town is probably best known for its brine and salt production. It is a market town and, in terms of population, is roughly the same size as Evesham which lies some 20km to the south-east. However, Droitwich Spa is much closer to towns and cities outside the District including Worcester (5km to the south-west), Bromsgrove (7km to the north-east) and Redditch (14km to the east). Its proximity to the M5 motorway means that it is relatively easy for car-borne shoppers to travel to higher order centres.

4.61 There are two fairly distinct parts of the Primary Shopping Frontage in Droitwich Spa, with St Andrews church separating these two areas. To the east of the church is the historic High Street which contains many buildings of high architectural quality. To the south-west of the church lies the Salters Shopping Centre on St Andrews Square, a mainly pedestrianised precinct, altogether different in character, and developed in the mid 1970s. An extension to the Shopping Centre, providing two additional units has recently been constructed. Secondary Shopping Frontages extend further to the west along Ombersley Street and in the eastern part of the town centre on Queen Street.

Retail Composition

4.62 The current retail composition of the Droitwich Spa town centre is summarised in Figure 4.8 overleaf, together with previous data for the years 2001, 2003 and 2005 for comparison:

4.0 Existing Shopping Facilities

Figure 4.8: Retail Composition of Droitwich Spa Town Centre

	No. of units 2001	No. of units 2003	No. of units 2005	No. of units 2006
Convenience	15 (10%)	15 (9%)	16 (10%)	14 (9%)
Comparison	71 (46%)	82 (51%)	76 (48%)	81 (49%)
Services	50 (32%)	54 (33%)	51 (32%)	54 (33%)
Vacant	8 (5%)	6 (4%)	12 (8%)	11 (7%)
Miscellaneous	8 (5%)	3 (2%)	3 (2%)	5 (3%)
Total	156 (100%)	160 (100%)	158 (100%)	164 (100%)

Source: Chase & Partners (2001), Experian (2003 & 2005), DPDS/Experian (2006)
Figures may not add due to rounding
'Miscellaneous' category comprises post offices, employment agencies and information centres

4.63 Almost half of the units in Droitwich Spa town centre are occupied by comparison goods retailers. National multiple retailers include Wilkinsons, Boots, Peacocks, New Look, Dollond & Aitchinson, Stead & Simpson, Savers chemist and WH Smith. The majority of these multiple retailers are found in or around the Salters Shopping Centre which provides a variety of unit sizes ranging from around 75sq.m. to around 1,150sq.m. (gross) (excluding the Morrisons supermarket). Two additional shop units, close to the Morrisons foodstore, opened in autumn 2006 and have been occupied by Argos and Carphone Warehouse.

4.64 The High Street largely comprises independent comparison goods retailers. There are a number of shops selling clothing and fashion goods along the High Street and also a number of stores selling household goods, electrical goods or furniture.

4.65 The available historic data indicates that the number of units in the comparison sector has fluctuated between 71 and 81 since 2001. In terms of popularity, Figures 4.9 and 4.10 overleaf shows towns and cities with the leading market shares of non-bulky goods expenditure in the Droitwich zone in 2001 and 2006.

Figure 4.9: Clothing, Footwear and Fashion Shopping Destination (Droitwich Spa Zone)

	2001	2006
Worcester	66%	48%
Droitwich Spa	7%	19%
Merry Hill, Birmingham	6%	2%
Birmingham	3%	4%
Cheltenham	3%	1%
Internet / Mail Order	6%	4%
Bromsgrove	5%	5%
Kidderminster	1%	5%
Redditch	1%	4%

Figure 4.10: Other Non-Bulky Non-Food Goods Destination (Droitwich Spa Zone)

	2001	2006
Worcester	45%	50%
Droitwich Spa	25%	20%
Bromsgrove	7%	6%
Birmingham	7%	3%
Merry Hill, Birmingham	3%	4%
Internet / Mail Order	4%	10%

4.66 The results for Droitwich Spa are similar to those for Evesham reported earlier in this section. Droitwich Spa has increased its market share of clothing, footwear and fashion expenditure in the Droitwich zone since 2001 (from 7% to 19%) but, in terms of other non-bulky non-food goods, its market share has decreased (from 25% to 20%). Droitwich Spa town centre's success in retaining more fashion expenditure appears to be at the expense of Worcester. However, Worcester has increased its market share of other non-bulky non-food expenditure in the Droitwich Zone, and internet or mail order shopping has more than doubled since 2001.

4.67 In terms of visitor perception, Droitwich Spa town centre scored just 0.03 for the range and choice of non-food shops according to the household survey (the lowest of any of the three main centres in Wychavon). 18% of visitors disliked the town centre because there is not enough choice of shops, and 36% indicated that they would visit more often if there was a broader range of shops.

4.68 At the time of survey in July 2006, there were 14 units occupied by the convenience sector in Droitwich Spa town centre, equivalent to around 8% of the total number of units available. The largest stores are occupied by Waitrose (2,011sq.m.net) and Morrisons (1,788sq.m.net). The Waitrose store opened in 2005. Other convenience stores include butchers shops, off licences, a general convenience store, a newsagent, a bakers, a confectioners and a health food shop.

4.69 Between the 2005 and 2006 surveys, the number of convenience stores in the town centre fell by 2 from 16 to 14. The fall was a result of the closure of the Kwik Save supermarket and Dewhurst butchers in the Salterns Shopping Centre. Stokes the Greengrocers in St Andrews Square has closed down since the time of the 2006 survey and so the number of convenience stores has fallen to 13.

4.70 According to figures derived from the household survey results, Morrisons, Waitrose and other town centre stores attract around 57% of convenience goods expenditure generated in the Droitwich Zone. Over a third of the expenditure is spent in stores in Worcester or Bromsgrove. In terms of visitor perception, the town centre scores relatively well (0.68) for choice and quality of supermarkets. New or improved supermarket provision was not a factor mentioned when respondents of the household survey were asked for measures to encourage more frequent visitation. Given the range and choice of foodstores available, and on the basis of visitors views expressed in the household survey, it is considered that convenience goods provision in Droitwich Spa town centre is very good.

4.71 The service sector occupies a third of the available units in the town centre of Droitwich Spa. The sector includes the main ‘High Street’ banks, estate agents, travel agents, beauty salons and hairdressers, restaurants, take away food outlets and a dry cleaners.

Vacant Units

4.72 There were 11 vacant units in the town centre at the time of the survey in July 2006, equivalent to around 7% of the total number of units. This is below the national average vacancy rate for town centres (10%). The vacancies are relatively dispersed and do not detract from the sense of vitality in the town centre.

Other Uses in the Town Centre

4.73 Aside from retail and service uses, Droitwich Spa town centre attracts visitors for other reasons including the Health Centre, library, two community centres, Council offices, information centres, the advice bureau, housing association offices and other businesses, solicitors, accountants, churches, hotel accommodation, the brine baths and other tourist attractions.

Environmental Quality

4.74 As previously noted, there are two distinct parts of Droitwich Spa town centre separated by the church and community centre on the corner of St Andrews Street and High Street. To the east is the historic High Street which contains a mix of 2 or 3 storey buildings of varied architectural styles, including some fine examples of timber frame buildings.

4.75 To the south west of the church, the town centre is more modern in appearance. The Salterns Shopping Centre is tidy but bland, although the trees in St Andrews Square help to soften the appearance. The covered walkways in the Salterns Shopping Centre provide shelter from inclement weather but can feel dark and oppressive. The recent extension to the shopping centre is a distinct improvement with its glazed canopies. The area further to the west around Victoria Square is an attractive area containing some high quality historic buildings, well-designed and robust street furniture, and some mature trees.

4.76 According to the survey of visitor perceptions, Droitwich Spa scores 0.86 for environmental quality and, of the three main town centres, feels the safest place in terms of personal security.

Footfall

4.77 According to data from the Wychavon Retail Monitor, the highest levels of footfall since 1995 have been recorded in the St Andrews Square area, with relatively high flows also experienced in the Victoria Square area. However, like Evesham, footfall has generally declined in Droitwich Spa town centre over the past 10 years although it is noted that since the opening of Waitrose in 2005, the early data suggests that footfall on the High Street has increased.

Commercial Yields

4.78 Droitwich Spa has shared the same yield of 7.50% with Evesham since the late 1990s (see earlier Figure 4.7). However, as a lower order centre, this is a more satisfactory position for Droitwich Spa. The town's near neighbours Worcester and Bromsgrove have yields of 4.75% and 7.00% respectively.

Accessibility

4.79 Droitwich Spa town centre benefits from a number of car parks in close proximity to the shops and services. The main car parks are as follows:

Covercroft (Morrisons)	330 spaces
Covercroft (Day Centre)	60 spaces
High Street (Waitrose)	199 spaces
St Andrews Road	100 spaces
Ricket Lane / Friar Street	98 spaces

4.80 The main bus stops in the town centre are on Ombersley Street East and Victoria Square. Droitwich Spa is on the main bus route between Worcester and Birmingham with frequent services. Buses also serve villages along the routes to Bromsgrove, Stratford upon Avon, Redditch and Stourport. There is no direct bus service to either Evesham or Pershore.

4.81 In terms of the potential for visitors arriving on foot, Droitwich Spa is not as accessible as Evesham and Pershore. Firstly, the town centre is not particularly 'central' in the context of the surrounding residential areas; over time, housing has spread to the west and south of the town centre more than in other directions. Secondly, the Saltway to the south and west, the Droitwich Canal to the north, and the railway lines to the north and west all present physical barriers for pedestrians considering walking to the town centre.

4.82 Once in the town centre, visitors find it reasonably easy to move around the centre, much of which is pedestrianised or has wide pavements. Pavement width is a little narrower along the historic High Street.

4.83 Droitwich Spa town centre scored well in terms of visitor perception of accessibility issues. The town centre received higher scores than Evesham and Pershore in terms of accessibility by public transport, accessibility by car, adequacy of parking arrangements, and ease of pedestrian movement around the centre.

Summary of Droitwich Spa Town Centre

4.84 Droitwich Spa town centre has a mix of modern and traditional shop units, almost half of which are occupied by comparison goods retailers. National multiple retailers are concentrated in and around the Salterns Shopping Centre which contains some of the larger units in the town centre. The town centre has two large supermarkets complemented by a range of smaller convenience stores. Services occupy a third of units and the vacancy rate is relatively low.

4.85 The town centre has a generally attractive shopping environment and attracts visitors for a variety of reasons, not just shopping. The centre is accessible by car and by public transport and pedestrians can move reasonably easily around the centre with few physical or psychological barriers. Footfall overall has declined since the counts achieved in the mid-late 1990s but there are signs that the High Street has been boosted by the new supermarket development (Waitrose).

4.86 The proximity of towns and cities including Worcester, Redditch and Bromsgrove curtail the catchment area of Droitwich Spa town centre. However, it is considered that Droitwich Spa town centre provides a choice of supermarkets and a relatively broad range of comparison goods stores given its proximity to higher order competing centres.

Out-of-Centre Retail Provision in Droitwich Spa

4.87 There is a retail warehouse park at Kidderminster Road in Droitwich Spa (known as Roman Way Retail Park). There are 3 units, two of which are occupied by Homebase (predominantly DIY goods) and DFS furniture. The other unit, previously occupied by Miller Bros (electrical goods), is currently vacant. There is an extant planning consent for another retail warehouse park on the opposite side of Kidderminster Road.

Pershore

4.88 Pershore is a small market town in the heart of the Vale of Evesham and is located 9km to the west of Evesham and 11km to the south-east of Worcester. It is adjacent to the River Avon.

4.89 Pershore town centre is renowned for its attractive Georgian façade on the High Street and Broad Street where many of the building are listed. The Local Plan-defined Primary Shopping Frontage extends along the High Street from Broad Street to just beyond Church Street. Secondary Shopping Frontages stretch further to the north (High Street) and include Broad Street and part of Bridge Street to the south.

Retail Composition

4.90 Figure 4.11 overleaf shows the retail composition of Pershore town centre and, by way of comparison, the equivalent figures from 2001.

4.91 There has been an overall reduction in the total number of units since 2001. This is mainly due to some of the more peripheral retail units which existed in 2001 being converted to residential use.

Figure 4.11: Retail Composition of Pershore Town Centre

	No. of units2001	No. of units2006
Convenience	11 (9%)	12 (11%)
Comparison	57 (49%)	56 (50%)
Services	40 (34%)	36 (32%)
Miscellaneous	2 (2%)	2 (2%)
Vacant	7 (6%)	5 (5%)
Total	117 (100%)	111 (100%)

Source: Chase & Partners (2001), DPDS (2006)
Figures may not add due to rounding
'Miscellaneous' category comprises post offices, employment agencies and information centres

4.92 At the time of survey in July 2006, there were 12 convenience units in the town centre. The largest of these, and by some distance the largest store in the town centre, is the Co-op store (1,475sq.m.net) situated between the High Street and King George's Way. Tesco Express has recently opened in the High Street taking over the premises previously occupied by Dillons newsagent. In addition, the convenience sector comprises an off licence, a butcher, two delicatessens, two bakers, two health food shops, a greengrocer, and a fishmonger. The indoor market is also important for convenience goods as it has a baker, two butchers / cheese stalls, a wet fish stall and two greengrocers. The choice and quality of supermarkets in town centre is not one of Pershore's strengths according to the household survey results, as it scored -0.09.

4.93 56 units of the units in the town centre, 50% of the total available, are dedicated to the sale of comparison goods. Whilst Pershore town centre has few national multiple comparison goods retailers, the town centre scores higher than Evesham and Droitwich Spa in terms of visitor perceptions of the range and choice of non-food shops (scoring 0.48) perhaps reflecting the variety of independent shops available and the lower expectations of visitors. Stores selling comparison goods include those offering cameras, jewellery, gifts, collectables and antiques, flowers and plants, artist materials, books, haberdashery, audio equipment, bicycles and accessories, pet supplies, furnishings and interiors, cookware, carpets, hardware and office supplies. In addition, there are chemists, including Boots, and a number of opticians. Perhaps the most surprising element, considering it is a relatively small town centre, is that Pershore has 12 shops (over 10% of the stores in the town centre) selling clothing and fashion items. The household survey indicates that such stores attract around £4.4m of expenditure, almost as much as clothing and fashion stores in Droitwich Spa.

4.94 According to results of the household survey, 20% of residents in the Pershore Zone use Pershore town centre for clothing, shoes and fashion goods. 42% visit Worcester, and 10% visit Evesham. Figure 4.12 below compares these results with those from the 2001 survey:

Figure 4.12: Clothing, Footwear and Fashion Shopping Destination

	2001	2006
Pershore	6%	20%
Worcester	57%	42%
Evesham	12%	10%
Internet / Mail Order	5%	4%

4.95 Figure 4.12 clearly shows that Pershore has become more attractive a destination for clothing, shoes and fashion goods in the past 5 years, largely at the expense of shops in Worcester.

Figure 4.13: Other Non-Bulky Non-Food Goods Destination

	2001	2006
Pershore	14%	16%
Worcester	47%	38%
Evesham	12%	10%
Internet / Mail Order	8%	14%

4.96 Figure 4.13 shows the main destinations' market share of other non-food non-bulky goods expenditure generated in the Pershore Zone. Notably, the proportion of such expenditure being spent online, through mail order, or via other non-store businesses has increased significantly, and the market share of Worcester has decreased, although it remains the most popular destination.

4.97 Services in the centre comprise around a third of the town centre units. Three of the major banks are represented along with Cheltenham & Gloucester Building Society. The service sector also includes estate agents, hairdressers, beauty salons, a travel agent, a dry cleaners, and a laundrette. At the time of survey in July 2006, there were seven restaurants in Pershore town centre and a number of cafes and takeaway food outlets.

Vacant Units

4.98 Figure 4.11 shows that Pershore town centre has just 5 vacant retail units, equivalent to 5% of the total number of units. The number of vacancies has reduced slightly since 2001 but, as mentioned previously, the total number of units in the town centre has reduced as some of the smaller, more peripheral retail units which were less commercially viable and more likely to be vacant have been converted to residential dwellings. The largest and most high-profile vacancy in 2001, the former Post Office, has been converted to a tourist information centre and Town Council offices.

4.99 Three of the five vacant units are located at the corner of Broad Street and Bridge Street (two of which are small units in the arcade). The other two vacancies are situated on High Street.

Other Uses in the Town Centre

4.100 Pershore has a number of non-retail uses attracting people to the town centre. The swimming pool and leisure centre on King George's Way is a key attractor, as is the No.8 Community Arts Centre. The town centre also has Wychavon District Council offices, a library, health centre, pubs, social clubs, a primary school and community centre. In terms of tourism, the Abbey Church is situated to the west of the town centre. Leisure facilities are described in more detail in Section 6 of this study.

Environmental Quality

4.101 Pershore has a very attractive built environment and received a good score (1.03) in this regard in the household survey. Recent investment has been focused on No.8 Community and Arts Centre on the High Street which has restored one of the town's most prominent buildings, bringing it back into beneficial use.

4.102 Recent studies have been commissioned by the Pershore Market Town Partnership to identify the feasibility of enhancing links between the town centre and the riverside. Many new visitors to the town centre would be unaware of the proximity of the river and measures to enhance linkages would be beneficial.

4.103 Traffic problems were cited as the main reason for disliking the town centre and through traffic on the High Street is a problem in terms of congestion, noise and pollution, thus detracting from the quality of the environment.

Footfall

4.104 The Wychavon Retail Monitor footfall figures for Pershore have fluctuated from year-to-year since 1995 which is to be expected as factors such as weather conditions will affect visitation levels. However, unlike the figures for Evesham which show a general decline in the numbers of visitors over the past 5 or 6 years, the data for Pershore suggests that visitor numbers are relatively stable.

4.105 The highest pedestrian counts are recorded near the Co-op and at the southern end of the High Street. The lowest levels are recorded on Bridge Street and the northern end of the High Street.

Accessibility

4.106 The most convenient car park serving the town centre is adjacent to the Co-op store and the market. This contains around 230 spaces and a 'pay-and-display' regime is in operation. Other car parks are located at the Civic Centre (approximately 300 spaces), Abbey Park (94 spaces), and Avon Meadows (40 spaces). In addition, there are on-street parking spaces on High Street and Broad Street, both time-restricted.

4.107 Pershore town centre has good public transport links with Worcester and Evesham as it lies on the main bus route between the two. However, services to villages to the north and south are very infrequent. Bus stops are located on Broad Street.

4.108 The household survey suggests that visitors are generally happy with the town centre's accessibility by car (scoring 0.99). Adequacy of car parking arrangements scored 0.57 and accessibility by public transport scored a relatively low 0.24.

Summary of Pershore Town Centre

4.109 Pershore has the fewest retail and service units of the three main town centres in Wychavon District. The town centre also has few national multiple retailers but a diverse range of mainly independent shops selling comparison goods. Co-op is the largest convenience store in the town centre and Tesco has an 'Express' format store on the High Street. These stores are complemented by mainly independent and specialist convenience stores.

4.110 The town centre has an attractive environment, relatively few vacant units, and the levels of pedestrian activity have remained stable over recent years. On the negative side, traffic congestion detracts from the visitor's enjoyment of the town centre.

4.111 Overall, Pershore town centre is considered to be a vital and viable centre having regard to its role in the hierarchy of centres and serves a relatively local catchment area.

Out-of-Centre Retail Provision in Pershore

4.112 There is little out-of-centre retail provision in Pershore. Somerfield has a store of 791sq.m.net sales area to the north of the town on Racecourse Road, within Pershore Industrial Estate.

A Comparison of Visitor Perceptions of Evesham, Droitwich Spa and Pershore

4.113 As previously mentioned, respondents in the household telephone survey were asked a series of questions about the town centres they used, and the results have been referred to in the assessments of the three town centres above. It is useful to compare the results of the three town centres to assess their relative strengths and weaknesses. Figure 4.14 below shows the scores achieved by each town centre in relation to a variety of factors.

Figure 4.14: Comparison of Visitor Perceptions of the Three Town Centres

	Evesham	**Droitwich Spa**	**Pershore**
Range and choice of non-food shops	0.11	0.03	0.48
Choice and quality of supermarkets	0.67	0.68	-0.09
Choice and quality of service facilities	0.98	0.95	0.62
Range and choice of leisure/entertainment facilities	-0.32	-0.39	0.71
Accessibility by public transport	0.19	0.28	0.24
Accessibility by car	0.76	1.03	0.99
Adequacy of parking arrangements	0.13	0.60	0.57
Quality of the environment	0.79	0.86	1.03
Ease of pedestrian movement around the centre	0.97	1.00	0.62
The level of personal security and safety	0.74	0.87	0.83

Notes: Respondents were given the option of rating centres as 'very good', 'good', 'average', 'poor', or 'very poor'. For the purposes of analysis, these responses were given a score of 2, 1, 0, -1, and -2 respectively and an average score was then calculated.

Range and Choice of Non-Food Shops

4.114 Despite having the fewest comparison goods shops of the three main town centres, Pershore received the highest score. There are two likely reasons for this: Firstly, the shops in Pershore town centre offer goods ranging from day-to-day items to specialist goods, and they range in price from discount items to high value goods. Secondly, given the size of the town centre and the role it serves, visitor expectations may be lower in Pershore than they are in Evesham and Droitwich Spa.

Choice and Quality of Supermarkets

4.115 The results here are not surprising. Droitwich Spa and Evesham have a choice of major supermarkets in their town centres and received relatively high scores. The Co-op store is the only large supermarket in Pershore town centre. The score of -0.09 is by some considerable distance the lowest score Pershore town centre received in the survey.

Choice and Quality of Service Facilities

4.116 Evesham and Droitwich Spa town centres scored well for service facilities. Pershore received a lower score which reflects the fact that it has fewer services and its status in the hierarchy.

Range and Choice of Leisure / Entertainment Facilities

4.117 Evesham and Droitwich Spa received very low scores for leisure and entertainment facilities. Pershore received a relatively high score by comparison. Section 6 assesses the leisure provision in the three main towns and reflects on the results of the household survey.

Accessibility by Public Transport

4.118 The scores received were relatively low for all three town centres and there is little to choose between them.

Accessibility by Car

4.119 By contrast to public transport accessibility, all three town centres received relatively high scores for accessibility by car. Droitwich Spa and Pershore received the highest scores with Evesham's one-way system and frequent congestion on entry routes likely to affect its score.

Adequacy of Parking Arrangements

4.120 Evesham received the lowest score for adequacy of parking arrangements. Droitwich Spa and Pershore received reasonably high scores.

Quality of the Environment

4.121 All three town centres received relatively high scores in respect of environmental quality with Pershore receiving the highest score.

Ease of Pedestrian Movement

4.122 Evesham and Droitwich Spa received particularly high scores for this attribute. The pedestrianised areas in these two town centres provide safe, vehicle-free environments for visitors. The heavily-trafficked High Street in Pershore is a significant barrier to pedestrian movement and this is reflected in its score which is considerably lower than that of Evesham and Droitwich Spa.

The Level of Personal Security and Safety

4.123 According to the results of the household survey, Evesham, Droitwich Spa, and Pershore town centres are considered to be relatively safe environments and personal security is not perceived to be a significant issue.

Other Factors

4.124 Respondents of the household survey were asked to indicate aspects which they disliked about the town centres they visited. The most commonly mentioned factors are summarised in Figure 4.15 below together with the percentage of respondents mentioning the factor:

Figure 4.15: Main Dislikes in Town Centres

	Evesham	Droitwich Spa	Pershore
"Not enough shops"	13%	18%	4%
"Traffic problems"	11%	1%	11%
"Poor quality shops"	5%	7%	3%
"Lack of / cost of parking"	7%	9%	5%
"Unattractive environment"	7%	6%	1%

4.125 Also recorded as part of the survey, were respondents' views on potential measures to encourage them to visit town centres more often. Figure 4.16 below provides a summary of the main responses:

Figure 4.16: Measures to Encourage Visits to Town Centres

	Evesham	Droitwich Spa	Pershore
"Broader range of shops"	27%	36%	16%
"Better or more niche / specialist shops"	8%	8%	4%
"More parking"	9%	3%	4%
"Less expensive parking"	3%	4%	2%

4.126 Figures 4.15 and 4.16 suggest the following:

- Respondents are critical of the range of shops in Evesham and Droitwich Spa town centres. A lack of specialist shops was also identified in these two centres. The range of shops in Pershore town centre draws far less criticism and, as previously mentioned, this is probably because it has a reasonably diverse range of shops for a small town centre and expectations are lower;
- Traffic problems are cited in Evesham and Pershore but, notably, are not perceived to be an issue in Droitwich Spa; and
- The lack of, and cost of, parking attracts criticism from a significant proportion of respondents. However, this response is not unusual in household surveys for retail studies.

Visitation Rates

4.127 The household telephone survey asked respondents how often they visited the three main town centres in Wychavon. In terms of the study area as a whole, 40% of respondents visit Evesham town centre at least once a week. 27% visit Droitwich Spa town centre at least once a week, and 21% visit Pershore town centre as frequently.

4.128 In terms of the residents closest to each of the town centres, 82% of residents of the Droitwich Zone visit Droitwich Spa town centre at least once a week. The equivalent figure for the Evesham Zone and Evesham town centre is 75%, and 69% of Pershore Zone residents visit Pershore town centre at least once a week.

Use of Markets

4.129 The household survey sought to establish the popularity of the markets in each of the town centres. The following proportions of residents had visited the markets in the two months previous to the survey:

Figure 4.17: Use of Markets

	Evesham Zone Residents	Droitwich Zone Residents	Pershore Zone Residents	Study Area Residents
Evesham Market	48%	2%	13%	25%
Droitwich Market	1%	26%	4%	9%
Pershore Market	16%	4%	63%	24%

4.130 Figure 4.17 shows that the markets are popular with local residents but Evesham and Pershore markets appeal to a larger proportion of local residents. However, it should be noted that the Evesham market is permanent, and the Pershore market is more frequent than the Droitwich Spa market which is occasional (Tuesday, Thursday and Saturday).

Summary of Existing Shopping Facilities

4.131 Shopping patterns in Wychavon District are significantly influenced by the proximity of large town and city centres outside the District, particularly Worcester, Cheltenham and Stratford upon Avon.

4.132 Evesham has the largest town centre in the District with over 300 retail and service units. The town centre has a significant number of national multiple retailers and four of the national supermarket chains are represented. However, visitors to the town centre expressed disappointment at the range and choice of shops.

4.133 Evesham town centre is a reasonably vital and viable centre having regard to the relevant indicators but there is some cause for concern on a number of factors including declining footfall levels, visitor dissatisfaction, and the level of expenditure leakage to other centres. The part of the town centre to the east of the River Avon displays the lowest levels of vitality and viability.

4.134 Droitwich Spa is the second largest town centre in the District and has a mix of modern and traditional shop units. The proximity of towns and cities including Worcester, Redditch and Bromsgrove curtail the catchment area of Droitwich Spa town centre. However, the town centre provides a choice of supermarkets and a relatively broad range of comparison goods stores.

4.135 Pershore town centre has the fewest retail and service units of the three main town centres in Wychavon District. It has few national multiple retailers but does have a diverse range of mainly independent shops selling comparison goods. Co-op is the largest convenience store in the town centre. The town centre has an attractive environment and relatively few vacant units. On the negative side, traffic congestion detracts from the visitor’s experience of the town centre.

4.136 Pershore town centre is a vital and viable centre having regard to its role in the hierarchy of centres and serving a relatively local catchment area, sandwiched between the higher order centres of Worcester and Evesham.

5.0 The Need for Additional Retail Floorspace

Introduction

5.1 This section assesses the need for additional floorspace in the District having regard to the following:

- The quantitative analysis contained at Appendix D, based on the results of the household telephone survey; and
- The qualitative assessment of retail provision in the District, described in the previous section.

5.2 This approach is in accordance with guidance in PPS6 on assessing the need for retail development.

Key Assumptions

5.3 The capacity exercises for convenience and comparison goods are based on assumptions regarding the current market shares of stores in the three main towns in Wychavon District. Alternative scenarios are presented as part of the analysis.

5.4 Firstly, it is assumed that the market share of stores in each of the three towns is maintained and held as a constant. This is a conservative approach, making no allowance for an increase in expenditure retention, or ‘clawback’ from other towns.

5.5 Secondly, it is assumed that towns will increase their market share of available expenditure. This is a more positive approach, and assumes that through providing more retail floorspace in a town, it will increase its attractiveness as a shopping destination, and a greater proportion of expenditure will be retained.

5.6 The capacity exercises also take into account the following:

- Forecast increases in the proportion of expenditure dedicated to special forms of trading (including internet sales) based on figures from Experian taking into account past trends and economic forecasts;
- Forecast increases in the sales efficiencies of existing floorspace based on figures from Experian;
- Estimated levels of overtrading or undertrading in convenience stores (see Table 15); and

- Retail floorspace commitments in the District which will, at least in part, absorb surplus expenditure capacity.

5.7 Where surplus expenditure is identified (i.e. the difference between the total available expenditure and the expenditure absorbed by existing and committed floorspace), it is converted to a floorspace figure using an appropriate sales density.

Convenience Goods

5.8 Tables 16 to 18 of Appendix D provide projections of convenience goods expenditure and the estimated turnover of stores in the District over the period to 2021.

5.9 As previously mentioned in Section 3 of this study, per capita convenience good expenditure growth is much lower than the equivalent comparison goods figure. For the period to 2021, the estimated growth rate is 0.6% per annum.

5.10 Tables 16 to 18 present alternative scenarios for growth based on other factors influencing the amount of expenditure capacity available. The low growth scenario for each of the three towns is based on the following:

- The current market share is held as a constant;
- Floorspace efficiencies of existing stores will increase by 0.75% per annum (as recommended by Experian);
- The upper range estimate of the increase in internet shopping (also from Experian)

5.11 On the above basis, and taking into account existing commitments for convenience goods retail development where appropriate, Tables 16a, 17a and 18a show that there will be no surplus expenditure capacity in Evesham, Droitwich Spa or Pershore over the study period.

5.12 Tables 16b, 17b and 18b present the high growth scenarios for each of the three towns. This scenario involves the following assumptions:

- The current market share is increased to allow for a greater proportion of expenditure retention or 'clawback';
- Floorspace efficiencies of existing stores will increase by 0.5% per annum (lower than the Experian recommendation but more in line with past trends);
- The lower range estimate of the increase in internet shopping (from Experian).

5.0 The Need for Additional Retail Floorspace

5.13 Even with these more positive assumptions regarding expenditure growth, there is still no surplus convenience goods expenditure capacity in either Evesham or Droitwich Spa as shown in Tables 16b and 17b (mainly due to the fact that existing stores in these towns are undertrading overall). However, Table 18b shows that, based on the high growth scenario, there is a small amount of expenditure capacity in Pershore from 2011 which could support limited additional convenience goods floorspace.

5.14 Turning to qualitative factors, Evesham has a range and choice of supermarkets. The two largest supermarkets are in out-of-centre locations. The town centre has three supermarkets (Somerfield, Marks and Spencers Simply Food, and Iceland), the largest of which (Somerfield) has a sales area of 1,187sq.m. However, the town centre lacks a food superstore offering a broad range of goods to compare with the two out-of-centre superstores in Evesham.

5.15 Droitwich Spa has a choice of two large supermarkets, both located in the town centre. There are no clear qualitative deficiencies in foodstore provision in the town.

5.16 Pershore has two supermarkets: Co-op (1,475sq.m.net) in the town centre and Somerfield (791sq.m.) to the north of the town. The household survey indicated that visitors consider the range and choice of foodstore provision to be relatively poor in the town centre and an additional store would bring about some qualitative benefits for the centre.

5.17 On the basis of the above, it is considered that there is no overriding need for a new foodstore in Wychavon District in the short to medium term. However, proposals to improve foodstore provision by way of additional floorspace or through the refurbishment of existing stores within the town centres should be encouraged in line with a strategy to enhance the vitality and viability of those centres.

5.18 The Focus database suggests interest from discount foodstore operators in Evesham and Droitwich Spa. In the absence of quantitative need, and in accordance with the above strategy, such operators should be directed towards the respective town centres.

Comparison Goods

5.19 The two scenario approach to assessing the need for additional convenience goods floorspace has also been adopted for comparison goods. The high and low growth scenarios both assume an increase of 3.6% per annum in per capita expenditure, as recommended by Experian.

However, the differences between the alternative scenarios are as follows:

Low Growth Scenario

- The current market share is held as a constant;
- Floorspace efficiencies of existing stores will increase by 2.25% per annum (the mid point of the range recommended by Experian);
- The upper range forecast of Special Forms of Trading based on the increase in internet shopping (also from Experian)

High Growth Scenario

- The current market share is increased (by 10% of each town's current market share) to allow for a greater proportion of expenditure retention or 'clawback';
- Floorspace efficiencies of existing stores will increase by 2% per annum (the lowest point within the range suggested by Experian);
- The lower range forecast of Special Forms of Trading based on the increase in internet shopping (from Experian).

5.20 For the purposes of analysis, expenditure capacity in respect of comparison goods has been split into bulky and non-bulky categories. Assumed sales densities for new floorspace in Wychavon District reflect the different sales efficiencies of operators within these two sub-categories. However, PPS6 advocates assessing need within the broad categories of convenience and comparison goods. Therefore, in identifying overall floorspace capacity, the figures referred to below combine the quantitative assessments of need for bulky and non-bulky goods floorspace.

5.21 It is assumed that new non-bulky goods floorspace will have the following sales densities:

	Current Sales Density*	Assumed Sales Density
Evesham	£4,055/sq.m.	£4,000/sq.m.
Droitwich Spa	£2,979/sq.m	£3,000/sq.m.
Pershore	£3,446/sq.m.	£3,500/sq.m.

**based on results from the household survey*

5.22 It is further assumed that bulky goods floorspace will trade at £2,000 per.sq.m. having regard to typical sales densities achieved by national multiple bulky goods operators in Mintel's *Retail Rankings*.

5.0 The Need for Additional Retail Floorspace

5.23 On this basis, Tables 19 to 21 set out the capacity calculations in respect of Evesham, Droitwich Spa and Pershore. Table 22 provides a summary and the results are described below.

Evesham

5.24 Facilities in Evesham currently attract around 25% of non-bulky goods expenditure and 38% of bulky goods expenditure generated in the Study Area. Adopting the 'low growth' scenario, there will be around £1.7m and £14.2m of surplus expenditure by 2011 and 2016 respectively. This could only support around 400sq.m.net of additional comparison goods floorspace in 2011, rising to around 4,500sq.m.net by 2016.

5.25 However, applying the 'high growth' scenario results in significant levels of surplus expenditure in 2011 equating to around 5,000sq.m.net of additional floorspace. By 2016, surplus expenditure rises to around £33m, equivalent to over 11,000sq.m.net comparison goods floorspace.

Droitwich Spa

5.26 Shops in Droitwich Spa attract far lower levels of expenditure from the Study Area than stores in Evesham. Currently, the market share of facilities in Droitwich Spa is around 8% for non-bulky goods and around 14% for bulky goods.

5.27 The scope for additional comparison goods floorspace in the town is limited in 2011. Even adopting the high growth scenario, floorspace capacity is just over 1,000sq.m.net

5.28 By 2016, there will be surplus expenditure of between £0.5m and £6.9m, equivalent to between 1,000 to 2,400sq.m.net floorspace, depending on the growth scenario adopted.

Pershore

5.29 Stores in Pershore currently attract around 6% of non-bulky goods expenditure and 3% of bulky goods expenditure generated in the Study Area.

5.30 The expenditure capacity assessment shows that there is limited scope for additional comparison goods floorspace in Pershore in the short to medium term. Adopting the high growth scenario there will be less than 1,000sq.m.net floorspace required by 2011, and less than 2,000sq.m.net by 2016.

Qualitative Factors

5.31 The vitality and viability of all three town centres would benefit from additional comparison goods floorspace which would attract new retailers. Respondents to the household survey indicated that they were less satisfied with the range and choice of non-food shops in Evesham and Droitwich Spa than they were with other aspects of the town centres. Visitors to Pershore were generally more satisfied with the range and choice of non-food shops. The Focus database suggest that a number of retailers typically operating from 'High Street' locations have requirements for Evesham but there appears to be far less interest in Droitwich Spa and Pershore.

Summary

5.32 There is no need for additional convenience goods floorspace in the District over the period to 2016, with the exception of improvements to foodstore provision within the town centres which should be encouraged in line with a strategy to enhance the vitality and viability of those centres.

5.33 There is a need for additional comparison goods floorspace in the District. Depending on the assumptions used to forecast special forms of trading and other variables influencing expenditure growth, the floorspace requirement will be as follows:

	2011	**2016**
Evesham	400 - 4,900sq.m.	4,700 - 11,400sq.m.
Droitwich Spa	200 - 1,000sq.m.	1,000 - 2,400sq.m.
Pershore	100 - 800sq.m.	800 - 1,800sq.m.

Net floorspace figures

6.0 Leisure Facilities

Introduction

6.1 This section of the study examines commercial leisure facilities in the three main town centres in Wychavon. Sub-sectors such as health and fitness, cinemas and bingo halls are addressed in turn below, examining trends in the industry. Facilities within the District are assessed and the section concludes by assessing the potential for additional facilities. Account is taken of the Open Space Study undertaken by consultants PMP on behalf of Wychavon Council.

The Arts

6.2 According to the Arts Council's Annual Review 2006, arts and culture in the UK have never been in a better situation. In the last 60 years much focus has been given to developing and improving the practice of arts, investing in and supporting artists and organisations. However, more recently the focus has turned to audiences, widening the appeal and increasing the levels of participation in arts and culture.

6.3 The Evesham Arts Centre is located on Victoria Avenue, approximately 500m north of the town centre. The Centre has two theatre spaces, including a 312 seat air-conditioned auditorium, a large foyer with bar and lounge area, exhibition space, and a free large car park. The Centre is home to a wide variety of events including comedy, ballet, cinema, bands, and pantomimes.

6.4 The Norbury Theatre in Droitwich Spa is located on Friar Street in the town centre. It was established in the early 1960s and is entirely run by volunteers. It has a 176 seat auditorium, rehearsal room, four dressing rooms, and bar areas. The theatre has recently begun to show films in addition to staging plays, musicals and concerts.

6.5 In Pershore, the Number 8 Community Arts Centre, located on High Street in the heart of the town centre, opened in 2004 following a major redevelopment programme. Number 8 is mainly run by volunteers and facilities include a 250 seat auditorium, rehearsal room, café/bar, conference room. In addition to showing films, staging plays, and holding exhibitions, the Centre runs classes and workshops for the local community and is a valuable asset for residents of Pershore and the surrounding area.

6.6 The household survey demonstrates the popularity of the theatres in the respective town centres. 28% of Pershore Zone residents had patronised the theatre in Pershore in the last 12 months, and the equivalent figures for Droitwich Spa and Evesham were 15% and 14%

respectively. Museum, art gallery and exhibition facilities in the three town centres were also reasonably popular. Between 11% and 15% of residents in the respective local zone had visited the town centre for such reasons.

6.7 Turning to cinemas, during the 1990s, the domestic cinema industry underwent considerable expansion. Significant growth in cinema audiences (reacting to more popular output from Hollywood film studios) led to the development of large multiplex cinemas, often as part of multi-activity leisure developments in out-of-centre locations, but sometimes as anchors for mixed-use development in or on the edge of town centres.

6.8 Mintel estimate that growth in expenditure in cinemas in the UK increased by 12% over the period 1997-2002 (from £674m to £758m) but the industry's future is difficult to forecast due to a number of factors including:

- The industry relies to a great extent on the quality and popularity of movies being produced;
- Improvements in the quality, cost, availability, and accessibility of home entertainment including audio/visual equipment (plasma screens, LCD, High Definition, Nicam stereo etc), film downloads, pay-per-view channels, and digital television reduces the appeal of cinemas;
- The industry itself is also entering a period of change with the sale of Warner Village, Odeon and UGC.

6.9 The West Midlands Regional Spatial Strategy's "Regional Centres Study" (Technical Paper 3) suggests that there are parts of the region which have been 'over screened' in the past, threatening the viability of smaller single or double-screened cinemas. Even the 9-screen UGC cinema in the Arcadian Centre, Birmingham and UCI's 8-screen cinema in Solihull closed.

6.10 Whilst Evesham, Pershore and Droitwich Spa all have theatres which show movies, there is no dedicated cinema in the District (following the closure of the cinema in Evesham in 2005). The nearest cinemas are in Cheltenham and Worcester, both of which have multi-screen facilities. The household survey demonstrated the paucity of cinema facilities in the District. 25% of Pershore residents indicated that they had visited a Pershore cinema in the last 12 months. However, for Droitwich Spa, the figure is 3% and for Evesham it is just 1%.

Serviced Accommodation

6.11 Travelling for business and holidays is said to reflect macroeconomic conditions, and so the last few years since the 11 September attacks in 2001 have seen a gradual increase in visitor numbers and travellers across the UK, and particularly in London.

6.12 Budget operators including Travelodge, Premier Lodge, and Premier Travel Inn have been key drivers in hotel growth in recent years. At the other end of the market, major hotel chains are also beginning to offer ‘apartment hotels’ in major towns and cities which offer luxury suites to extended-stay guests.

6.13 As the Local Plan recognises, Wychavon serves an important role as a tourist location due to its geographical position and good communication links. The District’s appeal lies in its scenic beauty, quiet rural charm, and historic connections. Hotels and guest houses should be located in areas which have the amenities to support them and their guests, ideally within walking distance of town centres which are served by public transport, and the size of the accommodation should be in keeping with the settlement.

6.14 Wychavon District has a range of hotels and guest houses, including large country hotels with conference facilities (e.g. Wood Norton Hall, north-west of Evesham), a modern budget hotel (e.g. Premier Travel Inn, Evesham and the Travelodge, Droitwich Spa), a selection of pubs with bed & breakfast accommodation, and numerous small guest houses, many of which are centrally located in Evesham, Pershore and Droitwich Spa.

Eating and Drinking

6.15 At the national level, the last decade or so has seen major changes affecting pubs, restaurants, cafes, and bars. The most pertinent of these are described below:

- Higher disposable incomes has meant led to considerable growth in spending on eating out and drinking
- There has been significant growth in the coffee shop sector, dominated by chains including Starbucks, Costa Coffee and Café Nero.
- Growth in the restaurant sector is particularly prevalent in terms of:
    - Fashionable, London-based chains such as Wagamama and Gourmet Burger Kitchen
    - Restaurants offering healthy, specialist and/or quality meals (e.g. salad bars and sushi restaurants)

6.0 Leisure Facilities

- The number of public houses has decreased since 1990 and large chains including Wetherspoons, Lloyds, O'Neills and Hogshead have expanded significantly.
- The trend of pubs placing a greater emphasis on food sales is set to continue in order to maintain commercial viability.
- There are signs of a 'reaction' to the larger chains and gastro-pubs. Indeed, the value of the 'traditional local pub' as a community resource is often recognised in planning policy particularly in rural areas.

6.16 There are many cafés and coffee shops within the three main town centres in Wychavon District, most of which are independent rather than national chains. There is also a good selection of restaurants in the three town centres, which cater for most markets.

6.17 In terms of the evening economy there is a broad selection of pubs and bars in the three town centre which provide variety, and there are numerous take-away food outlets, particularly in more peripheral parts of the town centres.

6.18 Data in the Wychavon Retail Monitor clearly shows the steady increase in the amount of floorspace in A3 Food & Drink[1] use in all three town centres between the years 1997-2005. In all three cases, the amount of floorspace virtually doubled over that period.

6.19 According to the household survey, town centre pubs and clubs are well-frequented by local residents. 49% of the Droitwich Zone residents have visited a pub or club in Droitwich Spa town centre in the past 12 months. The equivalent figure for Evesham is 40% and for Pershore it is 34%.

6.20 Town centre restaurants are even more popular, according to the survey. Restaurants in Evesham town centre were visited by 58% of Evesham Zone residents in the past 12 months. In Pershore, the figure was 48%, and in Droitwich Spa the figure was 43%.

Sports, Health and Fitness

6.21 The health and fitness sector grew rapidly in the 1990s and benefited from a wider trend towards attaining a healthier lifestyle. According to Mintel, by 2001, there were 2,631 private health and fitness clubs in the UK and expenditure exceeded £1.6bn, an increase of 95% in five years. However, more recently there has been a period of consolidation in the industry although, in 2005, there were still over 2,000 private clubs with over 6 million UK members (Source: The Leisure Database Company).

[1] The Use Class A3: Food & Drink was, under the Use Classes (Amendment) Order 2005, divided into A3: Restaurants & Cafes, A4: Drinking Establishments, and A5: Hot Food Take-Away

6.22 Many health and fitness clubs offer a broad range of facilities and activities under one roof. As the market appears to be reaching saturation point, brand identity will be of great importance in terms of commercial survival. Locations close to major employment uses will also be of value to health and fitness operators looking to generate business.

6.23 Evesham Leisure Centre on Davies Road has a 25m swimming pool, gym and fitness classes ("Rivers"), sports hall, squash courts, and a health suite. In addition, there are a number of other fitness centres in Wychavon, including the following:

- One to One Fitness Centre, Waterside, Evesham
- Victoria Dolan Vale Dance & Fitness, Prince Henrys Close, Evesham
- Amanda's Workout, Merstow Place, Evesham

6.24 In terms of other public sports facilities, Evesham has Prince Henrys Sports Hall on Victoria Avenue, Evesham Rugby, Cricket and Bowls Club on Albert Road, and the Rowing, Tennis and Squash Club on Abbey Road. Evesham High School provides a venue for 5-a-side football events.

6.25 Facilities in Pershore include the Pershore Leisure Centre at King Georges Way which has a swimming pool, the bowling green in Abbey Park, the Indoor Tennis Centre at Avon Bank, the Pershore & District Sports Club and Cricket Club on Defford Road. There is the Heavenly Bodies fitness centre in Fladbury, between Pershore and Evesham. Pershore Leisure Centre also manages sports facilities at Pershore High School, including outdoor sports pitches.

6.26 Droitwich Spa Leisure Centre at Briar Mill acts as a focus for health and fitness in the town. The Centre includes a synthetic sports pitch. Droitwich Spa has two bowling greens at Vines Park and Lido Park, and the town also has tennis and cricket clubs. There are further pitches, courts, and a running track at Droitwich Spa High School. Rivers Fitness Rooms in Briar Mill and the Physique gym in the Berry Hill Industrial Estate also serve the town and surrounding area.

Ten Pin Bowling

6.27 Two technological advancements have boosted the success of ten pin bowling in the UK. The first was the introduction of automated 'pinspotters' in the 1960s which led to the development of around 160 bowling centres in the UK. However, around two-thirds of these had closed within five years, according to research by Sport England. The second change in technology was the introduction of electronic automated scoring in the 1980s, making the game much simpler and more attractive to the public. Operators including Hollywood Bowl and Bowlplex were the major driving force behind bowling centre development.

6.28 Research by Mintel suggests that the continued popularity of tenpin bowling is attributed to its broad appeal, attracting both younger consumers along with the older age groups within the family. The increase in levels of personal disposable income and growth in the numbers of consumers in the younger and family age groups have helped the market grow. Operators have benefited from positioning their venues as multi-leisure entertainment sites focused around a tenpin bowling offer.

6.29 Despite participation falling slightly since the mid 1990s, expenditure grows largely as a result of the propensity of existing customers to spend more on ancillary services such as food, drink, video games and slot machines. Operators have also been proactive, offering discounts to students, children, families and large groups.

6.30 There are no ten pin bowling alleys in Wychavon District. The District’s residents must travel to Worcester, Cheltenham, Redditch or Malvern for the nearest such facilities.

Bingo

6.31 Trends in bingo since 1980 have seen a decrease in the number of licensed premises from 1,700 to about 970 in 1994 and around 700 in 2004. However, there has been a substantial increase in turnover.

6.32 Legislative changes in 2002 allowed higher prizes in the larger clubs which has led to a marked trend towards consolidation, with the development of new style clubs in large units on out of centre retail or leisure parks, mirroring the trend associated with the growth of multiplex cinemas. The new purpose built clubs have a greater seating capacity, many with between 1,000 and 2,000 seats, and some over 3,000. Some bingo halls have simply converted retail warehouse units to suit their needs for large space with the benefit of plentiful adjacent car parking (particularly in the evening out of normal shopping hours).

6.33 Operators are promoting a more up-market image with bar and catering facilities and sometimes stage acts as part of the entertainment package. In terms of demographics, there have been increases in the number of male visitors and younger people since the 1990s. Over 3 million people in Britain now play bingo with over 90 million admissions per year (source: DTZ).

6.34 Whilst trends indicate that, overall, the bingo industry is expanding, deregulation as part of the Gambling Act 2005 will mean that large casinos are likely to attempt to attract existing bingo customers by providing their own games and by promoting wider gambling and gaming interests.

6.35 We understand that there are no dedicated bingo halls within Wychavon District although a number of village halls organise bingo events.

Casinos

6.36 There has been much debate regarding casinos in recent years. The latest position at the time of writing and following the Gambling Act 2005 is that the Government will permit one ‘regional casino’, eight larger casinos (minimum customer area 1,500sq.m.), and eight smaller casinos (min. 750sq.m.) across the UK. An independent panel will assess applications from local authorities wishing to have one of these seventeen casinos and the Department of Culture, Media and Sport will decide on their location in 2007.

6.37 Wychavon District Council did not submit a casino application. The nearest local authorities to apply for the regional casino were Solihull, Dudley and Coventry. Other authorities to apply for the large or small casinos included Swindon, Wolverhampton and Cannock.

Conclusions

6.38 PPS6 (paragraph 2.23) advises Council’s to prepare policies to help manage the evening and night-time economy. Policies should encourage a range of uses which appeal to a wide range of age and social groups and should ensure “*that provision is made where appropriate for a range of leisure, cultural and tourism activities such as cinemas, theatres, restaurants, public houses, bars night clubs and cafes*”.

6.39 It is considered that the three main towns in Wychavon are strong on arts and ‘traditional’ cultural facilities and have a reasonable range of restaurants and drinking establishments. However, they lack more contemporary leisure and cultural facilities, particularly the large scale attractions such as ten-pin bowling alleys, bingo halls and dedicated cinemas.

6.40 The commercial leisure sector is strong in the larger towns and cities outside of the District, particularly in Worcester and Cheltenham where there has been significant recent private investment, (e.g. The Brewery development in Cheltenham).

6.41 While the Council could seek to encourage a specific, large scale commercial leisure development to one of its town centres, such as a cinema or bowling alley, the implementation would be out of its hands and we do not see the value of identifying sites for such development in the circumstances of the three main town centres in the District. First, where there is market demand for such a development, it is likely to come forward without encouragement and where there is not, the allocation of a site will not help. Second, the priorities of commercial leisure investment change rapidly and the LDF risks becoming quickly dated and unhelpful if it is too specific.

6.42 As discussed in the following section, there are limited opportunities for growth in the three main town centres but each has one reasonably large site to accommodate new development. These are important opportunity sites, which would be suitable for a range of town centre uses including leisure uses. However, to specify the type of leisure use would risk sterilising the site and tend to pre-determine the contents and character of rest of the development rather than allowing the package to be assessed as a whole.

6.43 In conclusion, we consider that further leisure development should be encouraged in the three town centres. The cultural and leisure sector is likely to become a more important attractor of people to town centres in the future and it is important that the town centres meet changing expectations and continue to attract visitors, albeit in line with their scale, role and function.

7.0 Recommended Strategy

Introduction

7.1 This section provides a recommended retail and leisure strategy for the town centres in Wychavon District. It includes an assessment of potential areas which could accommodate additional retail and leisure development. Previous sections of this report have identified a need for additional comparison goods retail floorspace within each of the three main town centres over the period to 2016. Also, a need to broaden the range of leisure uses has been identified.

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

Areas for New Development

7.3 In the context of a forecast rise in population and expenditure growth within the catchment areas of the three main town centres, there is a need for additional comparison goods floorspace in the District over the next 5 to 10 years. There is a need to maintain the market share of the three town centres in the face of strong and increasing competition from towns and cities including Worcester, Gloucester, Cheltenham, Stratford, and Swindon. Improvements, or further developments, are likely to be required to bolster the vitality and viability of the District's town centres.

7.4 Any changes to existing retail allocations in the Local Plan would need to be made by way of a Development Plan Document rather than an SPD. Ideally, the need for additional comparison goods floorspace should predominantly be addressed through a single allocation in each of the town centres in the relevant Local Development Document. Concentrating new retail development in one area will help to achieve the 'critical mass' of retail floorspace necessary to attract investment. New retail development should either be within or relate well to the existing primary shopping areas of the three town centres (the definition of which is suggested below).

7.5 The areas of opportunity in Evesham, Droitwich Spa, and Pershore are identified broadly on the plan at Appendix E.

Evesham

7.6 The site at Oat Street and Cowl Street and to the rear of Bridge Street and High Street is allocated in the adopted Local Plan for non-food retail development. This area remains the best opportunity for an expansion of the town centre in light of the identified need for additional retail development in Evesham.

7.7 Given its proximity to the Primary Shopping Frontage on High Street and Bridge Street, the area represents an area of under-used land and, through a comprehensive redevelopment, has the potential to provide a significant amount of additional comparison goods floorspace providing a mix of unit sizes to suit modern retailer requirements.

7.8 The site is in multiple ownership and existing access and parking arrangements would need to be considered as part of any redevelopment proposals. The site would benefit from the production of a development brief to facilitate its promotion. The Council should also consider adopting such a brief as SPD to provide developer certainty on the site.

7.9 Redevelopment of this site will no doubt be a costly affair and it is essential that the Council makes every effort to attract investment in a comprehensive scheme. The site is suitable for a major, multi-level redevelopment. In addition to retail development, other town centre uses would be appropriate, including leisure, restaurant, café and office uses. Town centre parking should also be provided (and would be required by potential developers and retailers). Residential units on upper floors would also add to the sense of vitality in the town centre. However, it is important to reiterate that the area represents the most appropriate location for significant levels of retail floorspace to meet the identified need. Any proposals for a comprehensive mixed-use development must address the need for retail development as a priority above other uses.

7.10 Whilst there is a clear quantitative need for additional comparison goods floorspace (up to 5,000sq.m.net by 2011 and 11,000sq.m. by 2016), the site would also be suitable for convenience goods shopping as this would broaden the choice of foodstores in the town centre. In the context of the need to broaden the range of leisure facilities, the site would also be well-suited to a large-scale D2 use. However, the development as a whole should include provision for significant levels of additional <u>comparison goods</u> floorspace which would help address the identified need.

7.11 The design of such a scheme is crucial in order to ensure that development enhances the vitality and viability of the town centre, and meets current design standards for public streets and areas. The retail element of redevelopment proposals for this area should be pedestrian-friendly and create a retail 'loop' breaking through to the existing primary shopping frontages on High Street and Bridge Street.

7.12 Given the importance of design (in its broad context) in ensuring that redevelopment in this area enhances the town centre, the Council should take a strong lead in the design process and should, in view of the complex access and land ownership issues involved, and the need for a comprehensive development, consider preparing a planning brief for the area as a priority. The Council must actively promote the site and may have to take positive measures to bring forward the development including exercising its CPO powers to ensure that land assembly problems do not prejudice a satisfactory development. Positive action by the Council to help bring the site forward for development is also likely to attract potential investors.

Droitwich Spa

7.13 The quantitative needs assessment indicates that by 2011 there will be expenditure capacity to support modest levels of additional comparison goods floorspace. However, looking at the longer term, there will be a need for up to 2,400sq.m.net by 2016, assuming a reasonable increase in the town's current market share of expenditure.

7.14 Following the redevelopment of the site to the north of the High Street (Gurney's Lane) for a Waitrose supermarket, there are no sites allocated for retail development in the adopted Local Plan. However, an extension of the primary shopping area in a westward direction from the Salters Shopping Centre would be desirable as further modern development in the eastern part of the town centre is likely to affect its historic character and opportunities for redevelopment in this area are extremely limited.

7.15 Development on land between Saltway, Covercroft, Winnetts Lane, and Priory Lane should retain, refurbish or replace the existing supermarket, as the choice of foodstores in the town centre is one of its key strengths. It is recommended that appropriate uses should comprise comparison goods retailing, including a mix of units sizes, and any of the following uses: D2 leisure, A3 restaurant & cafes, A4 drinking establishments. Offices and/or residential uses should be encouraged at the upper floor levels to bolster the centre's vitality. The loss of parking would have to be considered carefully and any car parking needs arising from the development provided for. It is understood that the Council has had pre-application discussions with Kandahar Real Estate Ltd with regard to a potential comprehensive redevelopment of the existing Morrisons store and the land around it to include the provision of additional comparison goods floorspace and leisure uses.

7.16 In order to encourage comprehensive redevelopment of the site, the Council should consider working with any developer to produce a development brief for the site and adopt this as SPD.

Pershore

7.17 This study has identified a need for very modest levels of additional comparison goods floorspace in Pershore by 2011. By 2016, the floorspace requirement increases to between 800-1,800sq.m.net. The quantitative assessment of need also suggests that there is scope for some additional convenience goods floorspace too. Broadening the range of leisure facilities in the centre of the town would also benefit its overall vitality and viability.

7.18 Pershore has a very compact town centre and opportunities for new development are constrained by planning policies relating to its historic environment. However, the site at the northern end of the High Street allocated for mixed-use development in the adopted Local Plan offers some scope for an expansion of town centre uses. The site is currently used as a garage/workshop and car sales showroom. Land further to the south-east is under utilised, given its central location, and is well related to the largest town centre car park and the Market.

7.19 These two areas of the town centre represent the best opportunity for additional development and should be the focus for new town centre uses. New development should create good pedestrian linkages with High Street and/or the area around the Market, Co-Op and the Leisure Centre on King Georges Way.

7.20 In light of the identified need, LDF policy should promote retail development, both convenience and comparison goods floorspace, on the site. Given that the quantitative need for new floorspace is not particularly strong, and the Focus database suggests a lack of retailer demand for additional floorspace in Pershore, it is not recommended that LDF policy should insist that the site is developed comprehensively. However, the design of individual proposals should not prejudice other developments coming forward. In particular, retail development dedicated to one type of goods category (convenience or comparison) should not prejudice development for the other type coming forward. A2, A3, A4, A5, and D2 uses will be appropriate complementary uses at ground floor level, with leisure, office and/or residential uses above. An expansion of the popular indoor market would benefit the vitality and viability of the town centre. Any redevelopment in this area should ensure the continued success of Pershore Indoor Market.

General Town Centre Strategy

Car Parking

7.21 One of the most negatively perceived aspects of the three town centres is the availability and cost of car parking. In the context of increasing competition from other retail centres, it is important that Wychavon does not place its three town centres at a disadvantage. Parking regimes in competing centres should be monitored and due consideration should be given to existing and future parking arrangements.

Markets

7.22 Street markets predominantly selling discount goods have generally struggled in recent years across the UK as specialist discount stores in the 'High Street' have grown. Stores including Primark, QS, Peacocks, and Bon Marche offer similar goods at discount prices, and customers are turning to these stores because their fixed status and nationwide coverage gives them the edge over market traders in terms of customers' perceptions of quality and reliability.

7.23 However, the household survey indicates that the main markets in the three town centres are reasonably popular, and this is supported by observation on the ground. Evesham and Droitwich Spa also host farmers markets on a monthly basis. Proposals to expand or diversify the existing markets should be encouraged. If an existing market can broaden its appeal to fit in with its surroundings, the benefits are likely to flow in both directions.

Town Centre Boundary, Primary Shopping Area and Shopping Frontages

7.24 According to PPS6 (see Table 2, Annexe A), the Primary Shopping Area is the defined area *"where retail development is concentrated (generally comprising the primary and those secondary frontages which are contiguous and closely related to the primary shopping frontage). The extent of the Primary Shopping Area should be defined on the proposals map."* Primary Shopping Frontages are *"likely to include a high proportion of retail uses" and "Secondary Frontages provide greater opportunities for a diversity of uses."*

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

7.26 Having regard to the definitions contained in PPS6 and based on surveys of the three town centres, it is considered that there is no need to amend the Primary Shopping Frontage as defined in the adopted Local Plan for Evesham, Droitwich Spa and Pershore. It is further recommended that the Primary Shopping Areas for the three town centres should be defined in accordance with the plans contained at Appendix E. The Secondary Shopping Frontages defined in the adopted Local Plan for Evesham and Droitwich Spa should be retained, as these extend further than the recommended Primary Shopping Area boundary. However, in Pershore, it is considered that the Secondary Shopping Frontage definition can be deleted as the Primary Shopping Area will include these frontages.

Broadway

7.28 The central part of Broadway is defined in the adopted Local Plan as a Secondary Shopping Frontage, although there is no Primary Shopping Frontage or centre boundary defined. The reasoning behind the designation is to protect the vitality and viability of the centre by preventing the loss of shops or services, mainly to residential uses.

7.29 Broadway has approximately 60 shop units in the centre of the town. Many of the shop units are geared towards the significant Cotswold tourist trade and sell antiques, art, and gifts. There are also numerous cafes and tea rooms. Ten of the shop units in the centre sell clothing or accessories, although the offer is also mainly aimed at the tourist market.

7.30 However, there is no doubt that the centre serves local needs too. Several shops serve the day-to-day needs of local residents, including a Budgens foodstore, a butcher, delicatessen, and DIY / hardware stores). In addition, the centre has a post office, two banks, hairdressers, opticians, and estate agents. The household survey results also suggest that shops in Broadway attract custom for different types of goods, albeit only a small proportion of local residents.

7.31 In this context, it is considered that the vitality and viability of the centre should continue to be bolstered through local planning policy. However, instead of the current Secondary Shopping Frontage designation, it is suggested that Broadway is defined as a ‘Rural Centre’ or ‘Local Centre’ and an appropriate boundary is defined having regard to the location of shops and services in an up-to-date survey. It is recommended that an LDF policy is drafted, specifically for this centre, which is aimed at preventing the loss of shops and facilities in the centre which serve an important role to the local community. Such a policy should relate not only to proposed changes of use from shops to other uses, but should also cover changes of use from shops, services, eating and drinking uses, and leisure/community facilities to residential uses. For example:

- Proposals for a change of use from retail (A1) to non-retail uses (including A2-A5 and D2) at ground floor level will only be permitted where it is clearly demonstrated that it will not individually nor cumulatively have a detrimental impact on the vitality and viability of the centre; and
- Proposals for a change of use from A1-A5 or D2 uses to residential use at ground floor level will only be permitted where it is clearly demonstrated that the current use is no longer viable.

Out-of-Centre Retailing

7.32 The areas previously identified in the three town centres can accommodate the need for additional retail and leisure development. There is no need to allocate additional sites for retail development outside existing centres. Policies in the development plan should direct all retail development in the first instance towards the town centres, where appropriate in scale.

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

8.0 Summary and Conclusions

Existing Shopping Facilities

8.1 Shopping patterns in Wychavon District are significantly influenced by the proximity of large town and city centres outside the District, particularly Worcester, Cheltenham and Stratford upon Avon.

8.2 Evesham has the largest town centre in the District with over 300 retail and service units. The town centre has a significant number of national multiple retailers and four of the national supermarket chains are represented. However, visitors to the town centre expressed disappointment at the range and choice of shops.

8.3 Evesham town centre is a reasonably vital and viable centre having regard to the relevant indicators but there is some cause for concern on a number of factors including declining footfall levels, yields, visitor dissatisfaction, and the level of expenditure leakage to other centres. The part of the town centre to the east of the River Avon displays the lowest levels of vitality and viability. It is recommended that positive action is taken to bolster the vitality and viability of Evesham town centre.

8.4 Droitwich Spa is the second largest town centre in the District and has a mix of modern and traditional shop units. The proximity of towns and cities including Worcester, Redditch and Bromsgrove curtail the catchment area of Droitwich Spa town centre. However, the town centre provides a choice of supermarkets and a relatively broad range of comparison goods stores.

8.5 Pershore town centre has the fewest retail and service units of the three main town centres in Wychavon District. It has few national multiple retailers but does have a diverse range of mainly independent shops selling comparison goods. Co-op is the largest convenience store in the town centre. The town centre has an attractive environment and relatively few vacant units. On the negative side, traffic congestion detracts from the visitor's experience of the town centre.

8.6 Pershore town centre is a vital and viable centre having regard to its role in the hierarchy of centres and serving a relatively local catchment area, sandwiched between the higher order centres of Worcester and Evesham.

8.7 Out-of-centre retail provision in the District is largely confined to Evesham (the Four Pools area) and Droitwich Spa (Kidderminster Road). Both of the towns have large DIY stores and some non-food retail warehousing. Evesham has two out-of-centre food superstores and Pershore has a Somerfield supermarket to the north of the town.

The Need for Additional Retail Facilities

8.8 There is no need for additional convenience goods floorspace in the Evesham or Droitwich Spa by 2016, with the exception of improvements to foodstore provision within the respective town centres which should be encouraged in line with a strategy to enhance the vitality and viability of those centres. There is a quantitative need for a limited amount of additional convenience goods floorspace in Pershore over the next ten years, if a high growth scenario is assumed.

8.9 There will be a need for additional comparison goods floorspace in Evesham, Droitwich Spa and Pershore. In 2016, depending on the assumptions used to forecast expenditure capacity, the floorspace requirement for the three towns will be as follows:

	2011	**2016**
Evesham	400 - 4,900sq.m.	4,700 - 11,400sq.m.
Droitwich Spa	200 - 1,000sq.m.	1,000 - 2,400sq.m.
Pershore	100 - 800sq.m.	800 - 1,800sq.m.

Net floorspace figures

Leisure Facilities

8.10 Further leisure development should be encouraged in Evesham, Droitwich Spa and Pershore. The cultural and leisure sector is likely to become a more important attractor of people to town centres in the future and it is important that the town centres meet changing expectations and continue to attract visitors, albeit in line with their scale, role and function. Arts and cultural provision in the three town centres is relatively good but Evesham, Droitwich Spa and Pershore generally lack more modern leisure facilities, such as a bowling alley or dedicated cinema screens. Whilst we do not recommend making specific allocations for leisure uses, the Council should indicate that it will seek appropriate leisure uses in town centre redevelopment.

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Opportunity Sites

Evesham

8.11 The site at Oat Street and Cowl Street and to the rear of Bridge Street and High Street remains the best opportunity for an expansion of the town centre in light of the identified need for additional retail development in Evesham. Comparison goods floorspace should be the priority but other town centre uses such as convenience stores, restaurants, drinking establishments, and leisure uses will also be appropriate. Residential and office uses at upper floor level should be provided. Given the importance of design in ensuring that redevelopment in this area enhances the town centre, the Council should take a strong lead in the design process and should, in view of the complex access and land ownership issues involved, and the need for a comprehensive development, consider preparing a development brief (supplementary planning document) for the area <u>as a priority</u>.

Droitwich Spa

8.12 The Council should seek an extension of the primary shopping area in a westward direction from the Salters Shopping Centre as further modern development in the eastern part of the town centre is likely to affect its historic character and opportunities for redevelopment in this area are extremely limited. Development on land between Saltway, Covercroft, Winnetts Lane, and Priory Lane should retain, refurbish or replace the existing supermarket as the choice of foodstores in the town centre is one of its key strengths. New development should comprise comparison goods retailing, including a mix of units sizes, and any of the following uses: D2 leisure, A3 restaurant & cafes, A4 drinking establishments. Offices and/or residential uses should be encouraged at the upper floor levels to bolster the centre's vitality. In order to encourage comprehensive redevelopment of the site, and to help steer its design to benefit the town centre economy and environment, it is suggested that a development brief (SPD) is prepared.

Pershore

8.13 Pershore has a very compact town centre and opportunities for new development are constrained by planning policies relating to its historic environment. However, the site at the northern end of the High Street allocated for mixed-use development in the adopted Local Plan offers some scope for an expansion of town centre uses. The site is currently used as a garage/workshop and car sales showroom. Land further to the south-east is under-utilised, given its central location, and is well related to the largest town centre car park and the Market. These two areas of the town centre represent the best opportunity for additional development and should be the focus for new town centre uses. New development should create good

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pedestrian linkages with High Street and/or the area around the Market, Co-Op and the Leisure Centre on King Georges Way. In light of the identified need, LDF policy should promote retail development, both convenience and comparison goods floorspace, at an appropriate scale on the site as part of a missed use development. A2, A3, A4, A5, and D2 uses will be appropriate complementary uses at ground floor level, with leisure, office and/or residential uses above. An expansion of the popular indoor market would benefit the vitality and viability of the town centre.

Out-of-Centre Retailing

8.14 The areas of opportunity identified in the three town centres can accommodate the need for additional retail and leisure development. There is no need to allocate additional sites for retail development outside existing centres. Policies in the development plan should direct all retail development in the first instance towards the town centres, where appropriate in scale. In terms of existing out-of-centre retail floorspace, applications to vary conditions which would change the character of the existing development, for example by lifting restrictions on the type of goods to be sold or by sub-dividing units, should only be approved in exceptional circumstances.