South Worcestershire
Town Centres & Retail Strategy
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Prepared on behalf of

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South Worcestershire
Town Centres & Retail Strategy

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Appendix A: Plan showing Study Area and Survey Zones
1.0 Introduction

Background

1.1 Malvern Hills District, Worcester City, and Wychavon District Councils instructed DPDS Regional Ltd to prepare a Town Centre and Retail Strategy to help inform policies of the emerging South Worcestershire Joint Core Strategy and the respective Local Development Frameworks (LDFs) for each administrative area. The output consists of three separate Town centre and Retail Studies for each local authority and an Overall Retail Strategy document for the South Worcestershire Sub-Region. Work began in April 2007.

Objectives of the South Worcestershire Town Centres and Retail Strategy

1.2 The key objectives of the Study are as follows:

• To assess retail expenditure capacity for the individual centres up to 2026;
• To undertake a household shopping survey to establish shopping patterns and to inform the healthchecks of the centres within the three administrative areas;
• To provide an assessment of commercial leisure facilities available to the residents in South Worcestershire;
• 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 provide a town centres and retailing strategy for the sub-region in the context of the wider regional hierarchy.

Structure

1.3 The strategy is structured as follows:

Section 2  Describes the policy background to this strategy.

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

Section 4  Provides an overview of shopping facilities within the South Worcestershire Sub-Region and the surrounding area, and conclusions on the levels of vitality and viability in the various city, town and district centres within the three administrative areas.
1.0 Introduction

Section 5  Sets out the 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 summary of the need for additional leisure development in each District within the Sub-Region.

Section 7  Examines opportunities for accommodating the identified need for additional retail and leisure development.
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 uses, taking into account both quantitative and qualitative factors;
• Identify deficiencies in retail and commercial leisure provision, assess the capacity of existing centres to accommodate new development;
• Identify centres where development will be focused;
• Review the boundaries of the primary shopping area;
2.0 Policy Background

- Identify sites in accordance with the sequential approach placing first preference on sites within centres; 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, Worcester is identified in the Strategy as one of 5 sub-regional foci for development beyond the MUAs. The others are 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 retail strategy should be adaptable to allow for the increased retail capacity that would accompany any large-scale expansion of the city.

West Midlands Regional Centres Study

2.8 In March 2006, Roger Tym and Partners with King Sturge undertook a strategic assessment of retail, leisure and office facilities in the West Midlands Region on behalf of the Regional Assembly. The Study estimated that the residual comparison goods requirement in 2021 will be around 427,000 sq. m. net. across the region as a whole. In terms of Worcester, the nearest centre to Malvern to be mentioned, the Study estimated that the requirement for city centre comparison floorspace by 2021 will be between 14,000 and 34,000sq.m.net, depending on the assumptions used regarding, *inter alia*, population and expenditure growth.
2.0 Policy Background

Roger Tym and Partners are currently updating the Study which will project forward capacity assessments to 2026 and take into recent commitments and the most up-to-date forecasts of expenditure growth, internet shopping, floorspace efficiencies etc. The Study will inform RSS policies which are likely to set upper limits for additional retail development for centres in the Region.

**Worcestershire Structure Plan**

2.9 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.

**City of Worcester Local Plan**

2.10 The City of Worcester Local Plan was adopted by the Council in October 2004 and, in line with the Structure Plan, covers the period to 2011. The Central Shopping Area of the city centre is defined on the Proposals Map, within which are identified Primary, Secondary and Heritage Shopping Streets.

2.11 There are two areas allocated for retail expansion: The largest site is at Lowesmoor, to the east of the Central Shopping Area, which now benefits from planning consent for a mixed-use development including a new foodstore and non-food retail units. The other allocation is in the southern part of the Central Shopping Area and comprises the Lychgate/Cathedral Plaza Shopping Centre. Only part of this allocated site has been refurbished / redeveloped since the allocation emerged.

2.12 St Johns is the only district centre defined in the Local Plan. The centre is approximately 1km west of the city centre, across the bridge over the River Severn. The site adjoining the centre to the east is allocated for a new foodstore.

2.13 The Local Plan identifies a number of neighbourhood centres across the City, intended to serve local shopping and service needs.
2.0 Policy Background

**Malvern Hills District Local Plan**

2.14 The Malvern Hills District Local Plan was adopted in July 2006 and, in line with the Structure Plan, covers the period to 2011. Policy EP9 directs new retail development to the town centres at Great Malvern, Tenbury Wells and Upton upon Severn, and the district centres of Barnards Green and Malvern Link. Town centre boundaries are defined on the proposals maps along with primary and secondary shopping frontages as appropriate.

2.15 Policy EP17 allocates land at Edith Walk for mixed-use development including retail uses. Policy EP18 allocates land at Tenbury Cattle Market and Teme Street for mixed-use development which should support the vitality and viability of the town centre.

**Wychavon Local Plan**

2.16 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 identified.

2.17 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 a retail study undertaken in 2001. These are at Avon Street/High Street and Bridge Street/Cowl Street/High Street/Oat Street.
3.0 Recent Trends in Consumer Spending

Retail Expenditure

3.1 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 (excluding alcohol) 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).

3.2 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

3.3 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 0.7% per annum over the study period.

Comparison Goods

3.4 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
3.0 Recent Trends in Consumer Spending

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 3.8% per annum has been used in respect of per capita comparison goods expenditure (from Experian).

3.5 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

3.6 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.

3.7 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.

3.8 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.
3.0 Recent Trends in Consumer Spending

3.9 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.

3.10 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.

3.11 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.

3.12 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

3.13 There has been considerable media attention devoted to internet shopping in recent times. ‘High Street’ sales were lower than expected over the Christmas 2005 and New Year period, whilst internet-based sales have been buoyant. However, contrary
3.0 Recent Trends in Consumer Spending

to some pessimistic forecasts, ‘High Street’ sales in Christmas 2006 were at their highest for three years. According to the ONS, growth was particularly high in respect of clothing and household goods in December 2007, but the highest growth rates were recorded in respect of ‘non-store sales’ including internet shopping. On this basis, it is still unclear the extent to which Internet shopping will replace traditional shopping.

3.14 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.

3.15 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.

3.16 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.

3.17 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.
3.0 Recent Trends in Consumer Spending

3.18 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%) in 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 for 2006, internet sales will have represented £30bn or 10% of all retail sales and a further £30bn of high street sales will be ’influenced’ by people browsing on the internet.

3.19 In any event, shopping online is 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 estimate of retail sales not taking place in stores in 2003 is 1.6% in respect of convenience goods and 5.4% in respect of comparison goods. The results of the household survey indicate that in the study area as a whole non-store convenience goods spending was 1.5% and for comparison goods it was 10.8%. The comparison goods figure is a 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:

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clothing / Shoes / Fashion</td>
<td>5.3%</td>
</tr>
<tr>
<td>DIY Goods</td>
<td>0.3%</td>
</tr>
<tr>
<td>Furniture / Floor Coverings</td>
<td>3.5%</td>
</tr>
<tr>
<td>Small Electrical</td>
<td>8.6%</td>
</tr>
<tr>
<td>Large Electrical</td>
<td>8.4%</td>
</tr>
<tr>
<td>Other Non-Food Goods</td>
<td>13.5%</td>
</tr>
</tbody>
</table>

3.20 Experian estimate that convenience goods expenditure which is not spent in stores will increase to around 6% by 2010 before levelling out in 2013 at around 6.5%. They estimate that comparison goods non-store spending will also continue to increase, levelling out at around 12.4% in 2013.
3.0 Recent Trends in Consumer Spending

3.21 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. As Experian explain in their Retail Planner Briefing Note (4.0, October 2006), there is a high degree of uncertainty in projecting the uptake of new technology and the rapid growth in internet sales could be a one-off result following the take up of broadband technology. If this is the case, internet growth would peak at a lower level and a little earlier than predicted. On this basis, Experian have produced what they describe as a “plausible low case” scenario for growth in non-store activity. In 2015, they estimate that non-store sales will be around 4% for convenience goods, and 8% for comparison goods.

3.22 In recent retail studies undertaken by DPDS, there appears to be strong growth in comparison sales over the internet particularly for non-bulky comparison goods. By comparison, there is much weaker growth in convenience sales. Therefore, having regard to Experian estimates and taking into account experience in other studies, the following proportions of non-store sales have been excluded from our forecasts of floorspace needs across the study area from 2012:

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Convenience Goods:</td>
<td>4%</td>
</tr>
<tr>
<td>Comparison Goods (Bulky):</td>
<td>5%</td>
</tr>
<tr>
<td>Comparison Goods (Non-Bulky):</td>
<td>12%</td>
</tr>
</tbody>
</table>
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, the South Worcester Sub-Region. First, the regional and sub-regional shopping hierarchy is examined in order to understand the position of centres in Worcester, Malvern Hills and Wychavon relative to competing centres. Secondly, facilities within each centre are assessed and the level of vitality and viability in the city, town and district centres is summarised. A fuller description of each centre is contained within the individual Town Centre and Retail Studies supplied to each of the participating Councils.

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 May 2007. The survey area was defined in consultation with officers from the three commissioning local authorities, and having regard to the results of a household survey carried out during 2000 as part of a previous retail study undertaken by MVM Planning on behalf of Worcester City Council. The area to the east of Worcester had already been surveyed in 2006 as part of the Wychavon Retail Study, and the results of this survey were incorporated into this Study. The overall survey area reflects the likely area of influence of Worcester city centre and the main town centres within Wychavon and Malvern Hills Districts.

4.3 The new household survey had a sample of 1,500 households (and the Wychavon Study had a sample of 1,000 households). A plan showing the geographic extent of the survey area is contained in Appendix A. For the purposes of analysis the new survey area was split onto 15 zones based on postcode geography. The area surveyed as part of the Wychavon Retail Study was split into three zones and is also shown on the plan at Appendix A.

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 Study Area.

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
4.0 Existing Shopping Facilities

turnovers (of around £100m and above). Birmingham is at the top of the hierarchy, followed by Merry Hill Shopping Centre, Coventry, Hanley, Wolverhampton and Solihull. Worcester is 7th in the rankings. None of the centres in Malvern Hills District or Wychavon District are mentioned in the Study’s hierarchy.

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

<table>
<thead>
<tr>
<th>Centre</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Worcester City</td>
<td>Sub-Regional centre</td>
</tr>
<tr>
<td>Kidderminster</td>
<td>Major County centre</td>
</tr>
<tr>
<td>Redditch</td>
<td>Major County centre</td>
</tr>
<tr>
<td>Evesham</td>
<td>Minor County centre</td>
</tr>
<tr>
<td>Bromsgrove</td>
<td>Minor County centre</td>
</tr>
<tr>
<td>Malvern</td>
<td>District centre</td>
</tr>
<tr>
<td>Droitwich</td>
<td>District centre</td>
</tr>
<tr>
<td>Pershore</td>
<td>Minor District centre</td>
</tr>
<tr>
<td>Stourport</td>
<td>Minor District centre</td>
</tr>
</tbody>
</table>


4.7 Figure 4.1 shows that Worcester is the highest placed shopping centre and defined as the ‘Sub-Regional Centre’. The Structure Plan acknowledges that the sheer scale and variety of shopping facilities in Worcester contributes towards its sub-regional role, the retention and development of which is a key strategic objective. In terms of other centres within the South Worcestershire Sub-Region, Evesham is defined as a ‘Minor County Centre’ and is higher in the hierarchy than Droitwich Spa and Malvern which are classed as ‘District Centres’, and Pershore which is a ‘Minor District Centre’.
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 the South Worcestershire Sub-Region, 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: South Worcestershire and the Surrounding Area*

<table>
<thead>
<tr>
<th>Centre</th>
<th>MHE Rank 2003-04</th>
<th>MHE Rank 2000-01</th>
</tr>
</thead>
<tbody>
<tr>
<td>Birmingham</td>
<td>6</td>
<td>6</td>
</tr>
<tr>
<td>Bristol</td>
<td>23</td>
<td>18</td>
</tr>
<tr>
<td>Cheltenham</td>
<td>24</td>
<td>24</td>
</tr>
<tr>
<td>Bath</td>
<td>28</td>
<td>30</td>
</tr>
<tr>
<td><strong>Worcester</strong></td>
<td><strong>54</strong></td>
<td><strong>53</strong></td>
</tr>
<tr>
<td>Brierley Hill, Merry Hill</td>
<td>61</td>
<td>49</td>
</tr>
<tr>
<td>Hereford</td>
<td>77</td>
<td>90</td>
</tr>
<tr>
<td>Gloucester</td>
<td>89</td>
<td>65</td>
</tr>
<tr>
<td>Cribbs Causeway, Bristol</td>
<td>100</td>
<td>89</td>
</tr>
<tr>
<td>Kidderminster</td>
<td>156</td>
<td>169</td>
</tr>
<tr>
<td>Redditch</td>
<td>165</td>
<td>165</td>
</tr>
<tr>
<td>Stratford upon Avon</td>
<td>170</td>
<td>145</td>
</tr>
<tr>
<td><strong>Evesham</strong></td>
<td><strong>262</strong></td>
<td><strong>269</strong></td>
</tr>
<tr>
<td>Dudley</td>
<td>301</td>
<td>249</td>
</tr>
<tr>
<td>Bromsgrove</td>
<td>336</td>
<td>282</td>
</tr>
<tr>
<td>Tewkesbury</td>
<td>565</td>
<td>572</td>
</tr>
<tr>
<td>Stourport on Severn</td>
<td>773</td>
<td>775</td>
</tr>
<tr>
<td><strong>Malvern</strong></td>
<td><strong>800</strong></td>
<td><strong>699</strong></td>
</tr>
<tr>
<td><strong>Droitwich Spa</strong></td>
<td><strong>829</strong></td>
<td><strong>739</strong></td>
</tr>
<tr>
<td>Ledbury</td>
<td>1449</td>
<td>989</td>
</tr>
</tbody>
</table>

*Source: Management Horizons Europe*
4.0 Existing Shopping Facilities

4.10 Worcester is ranked 54th in the MHE rankings and significantly higher than any other centre in the South Worcestershire Sub-Region. Evesham is ranked 262nd, Malvern is 800th and Droitwich Spa is 829th. Other centres in the South Worcestershire Sub-Region are not large enough to feature in the rankings. In terms of the changes over recent years, Worcester and Evesham have remained relatively stable over the period, but Droitwich Spa and Malvern has dropped down the rankings significantly.

4.11 The results of the household survey undertaken as part of this Study support the hierarchy structure, as Worcester has by far the highest market share of comparison goods expenditure generated within the South Worcestershire Sub-Region. However, towns and cities outside the Sub-Region also influence shopping patterns within it. The household survey indicates that Cheltenham and Tewkesbury have an influence on convenience and comparison goods shopping patterns within the southern part of the Study Area, whilst Kidderminster and Stratford-upon-Avon attract a notable amount of spending generated in the northern part.

4.12 Other towns and cities outside the South Worcestershire area have less influence on shopping patterns in the study area, but the combined draw of destinations such as Redditch, Birmingham, Tewkesbury, Hereford and Bromsgrove is notable.

Shopping Facilities in the Study Area

4.13 Having considered the regional and sub-regional shopping context, this section now turns to a summary of shopping provision within the Study Area. Centres are assessed in turn having due regard to the key indicators of vitality and viability set out in paragraph 4.4 of PPS6.

Worcester City Centre

4.14 Worcester is 54th in the UK shopping centre rankings. Of its nearest competing centres, only Birmingham and Cheltenham are higher in the rankings. Worcester city centre attracts prime zone A rentals of £170 per square foot (in 2006) and again is behind only Birmingham and Cheltenham in terms of competing centres. Yields are at a level of 4.75%, one of the lowest yields of shopping centres in the UK.

4.15 The city centre has over 600 retail and service units and around 102,000sq.m. of floorspace. The comparison goods sector, which is broad and varied, dominates the city centre although some visitors have indicated that they would still like to see more.

4.16 Planning permission exists for a food superstore on the edge of the city centre which would help address a deficiency in supermarket provision accessible to city centre visitors.
4.0 Existing Shopping Facilities

4.17 The number of vacant units is declining and the proportion of vacant units is below the national average for town centres.

4.18 The city centre has a historic and attractive environment, and it attracts visitors for many other reasons besides shopping. The centre is reasonably accessible by public transport and the car, and pedestrian movement around the compact centre is easy.

4.19 Surveys suggest visitors generally are content with the city centre, its environment and what it has to offer. Retailer demand for a presence in the City is high, with most operators seeking city centre premises.

4.20 Overall, the city centre displays strong levels of vitality and viability having regard to the relevant indicators as set out in PPS6.

Evesham Town Centre

4.21 Evesham has a reasonably attractive town centre and, with over 300 retail and service units, is the second largest centre in the South Worcestershire sub-region behind Worcester city centre. 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 a significant number of respondents in the household survey indicated that they would visit more often if there were more, or better, shops.

4.22 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 (i.e. stores over 2,500sq.m.). Service provision is generally strong although there are relatively few A2 uses (financial and professional services).

4.23 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.

4.24 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 commercial yields, 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. 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.

**Droitwich Spa Town Centre**

4.25 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 stores selling convenience goods. Services occupy a third of units and the vacancy rate is relatively low.

4.26 The town centre has a generally attractive shopping environment and draws 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 mid to late 1990s but there are signs that the High Street has been boosted by the recent supermarket development (Waitrose).

4.27 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 the town centre provides a choice of supermarkets and a relatively broad range of comparison goods stores given its proximity to higher order competing centres.

**Pershore Town Centre**

4.28 Pershore town centre has 111 retail and service units, but relatively few national multiple retailers. However, it has a diverse range of mainly independent shops selling comparison goods. The 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.

4.29 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.

4.30 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.
4.0 Existing Shopping Facilities

Great Malvern Town Centre

4.31 Great Malvern is 800th in the UK shopping centre rankings. In terms of competing large centres, Birmingham, Cheltenham, Bristol, Worcester, Gloucester, Merry Hill, Hereford and Cribbs Causeway are all in the top 100 centres and, all combined, provide a significant draw for residents of Malvern and the surrounding area.

4.32 The town centre has 138 outlets available and over 20,000 sq.m. of floorspace. The retail offer is generally geared towards meeting the basic local needs of residents and/or the needs of visitors and tourists. The household survey indicates that residents consider the range and choice of shops in the centre to be poor, compared to other aspects of the centre.

4.33 Great Malvern has a commercial yield of 7.5%, and is on a par with two other centres in the South Worcester sub-region, Evesham and Droitwich. The number of vacant units is low and declining, and the proportion of vacant units is significantly below the national average for town centres. Retailer demand for a presence in the town is only modest, with the majority of interest from the retail service sector.

4.34 The town centre has a historic and attractive environment, and it attracts visitors for many other reasons besides shopping. The centre is reasonably accessible by public transport and the car. Pedestrian movement around the compact centre is hampered by the gradients and traffic movement.

4.35 Aside from the range and choice of non-food shops, surveys suggest residents are generally content with the town centre, its environment and what it has to offer.

4.36 Overall, Great Malvern displays reasonably high levels of vitality and viability having regard to the relevant indicators as set out in PPS6.

Tenbury Wells Town Centre

4.37 Tenbury Wells lies in the northern part of Malvern Hills District and borders Shropshire to the north and Herefordshire to the south and west. It is relatively remote from major shopping centres. Tenbury Wells has an attractive and popular centre with a reasonably broad range of shops serving local residents. The centre displays high levels of vitality and viability having regard to the various indicators.
4.0 Existing Shopping Facilities

_Upton-upon-Severn Town Centre_
4.38 Upton upon Severn town centre displays reasonably high levels of vitality and viability having regard to the relevant indicators. It is an attractive centre, popular with tourists, with a range of shops predominantly serving local day-to-day needs.

_St Johns District Centre_
4.39 St Johns district centre in the western part of Worcester appears to function well in its role. It is a reasonably vital and viable centre with the prospect of further investment and expansion through new food store development in the near future.

_Malvern Link District Centre_
4.40 Malvern Link district centre is located almost 2km north east of Great Malvern town centre. The centre takes a linear form with the shops and services situated mainly along Worcester Road. Malvern Link displays modest levels of vitality and viability, and there are worrying signs of decline in the number of increasing vacancies and the sharply decreasing comparison sector.

_Barnards Green District Centre_
4.41 Barnards Green district centre is located just over 1km east of Great Malvern town centre. The shops and services are situated on either side of Barnards Green Road. The district centre is a reasonably vital and viable centre generally serving the basic day-to-day needs of small resident catchment area in the eastern part of Malvern.

_Comparison of Centres in the South Worcestershire Sub Region_
4.42 Figure 4.3 overleaf shows the retail composition of Worcester city centre and the six town centres in the sub-region, together with the total number of retail and service units available in each centre. The table shows that Worcester is more than double the size of the second largest centre, Evesham, in terms of the total number of units. The table also shows Worcester’s attraction for comparison goods shopping with 331 non-food shops. Outside of Worcester, Evesham is significantly larger than other town centres in the sub-region. Droitwich Spa has 164 retail and service units, Great Malvern has 138 and Pershore 111. Tenbury Wells and Upton upon Severn in Malvern Hills District are the smallest town centres in the Sub-Region.
4.0 Existing Shopping Facilities

Figure 4.3: Comparison of Size of Centres in the Sub-Region
(Number of Retail and Service Units Available)

<table>
<thead>
<tr>
<th>Sector</th>
<th>Worcester</th>
<th>Evesham</th>
<th>Droitwich Spa</th>
<th>Great Malvern</th>
<th>Pershore</th>
<th>Tenbury Wells</th>
<th>Upton upon Severn</th>
</tr>
</thead>
<tbody>
<tr>
<td>Convenience</td>
<td>44</td>
<td>25</td>
<td>14</td>
<td>13</td>
<td>12</td>
<td>11</td>
<td>10</td>
</tr>
<tr>
<td>Comparison</td>
<td>331</td>
<td>142</td>
<td>81</td>
<td>68</td>
<td>56</td>
<td>34</td>
<td>30</td>
</tr>
<tr>
<td>Service</td>
<td>185</td>
<td>100</td>
<td>54</td>
<td>49</td>
<td>36</td>
<td>27</td>
<td>23</td>
</tr>
<tr>
<td>Vacant</td>
<td>52</td>
<td>31</td>
<td>11</td>
<td>6</td>
<td>5</td>
<td>5</td>
<td>1</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>14</td>
<td>3</td>
<td>5</td>
<td>1</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Total</td>
<td>626</td>
<td>301</td>
<td>164</td>
<td>138</td>
<td>111</td>
<td>79</td>
<td>66</td>
</tr>
</tbody>
</table>

Source: Experian Goad and DPDS Surveys in 2006 (except Tenbury Wells and Upton upon Severn in 2007)

4.43 In terms of the role and function of the city and town centres in the sub-region, there is a clear shopping hierarchy. Worcester is the pre-eminent shopping centre serving as a focus for comparison goods shopping for the whole sub-region. Competing centres such as Cheltenham, Birmingham and Hereford become more of an influence on shopping patterns in peripheral parts of the study area.

4.44 Evesham town centre has a comparatively broad range of non-food shops and a reasonably wide catchment area. Great Malvern and Droitwich Spa town centres are anchored by large food stores, but their catchment areas for non-food goods are curtailed by the proximity of large competing centres. Pershore, Upton-upon-Severn and Tenbury Wells town centres predominantly serve local needs.

4.45 Respondents in the household surveys 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 200, 100, 0, -100, and -200 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 Figure 4.4 below.
4.0 Existing Shopping Facilities

![Figure 4.4: Comparison of Visitor Perceptions of Centres in the Sub-Region](image)

<table>
<thead>
<tr>
<th>Factor</th>
<th>Worcester</th>
<th>Evesham</th>
<th>Droitwich Spa</th>
<th>Great Malvern</th>
<th>Pershore</th>
<th>Tenbury Wells</th>
<th>Upton upon Severn</th>
</tr>
</thead>
<tbody>
<tr>
<td>Range and choice of non-food shops</td>
<td>46</td>
<td>11</td>
<td>3</td>
<td>-22</td>
<td>48</td>
<td>42</td>
<td>57</td>
</tr>
<tr>
<td>Choice and quality of supermarkets</td>
<td>16</td>
<td>67</td>
<td>68</td>
<td>89</td>
<td>-9</td>
<td>45</td>
<td>34</td>
</tr>
<tr>
<td>Choice and quality of service facilities</td>
<td>97</td>
<td>98</td>
<td>95</td>
<td>102</td>
<td>62</td>
<td>65</td>
<td>65</td>
</tr>
<tr>
<td>Range and choice of leisure / entertainment facilities</td>
<td>39</td>
<td>-32</td>
<td>-39</td>
<td>58</td>
<td>71</td>
<td>9</td>
<td>7</td>
</tr>
<tr>
<td>Accessibility by public transport</td>
<td>41</td>
<td>19</td>
<td>28</td>
<td>26</td>
<td>24</td>
<td>-34</td>
<td>-32</td>
</tr>
<tr>
<td>Accessibility by car</td>
<td>61</td>
<td>76</td>
<td>103</td>
<td>80</td>
<td>99</td>
<td>62</td>
<td>84</td>
</tr>
<tr>
<td>Adequacy of parking arrangements</td>
<td>15</td>
<td>13</td>
<td>60</td>
<td>-3</td>
<td>57</td>
<td>7</td>
<td>16</td>
</tr>
<tr>
<td>Quality of the environment</td>
<td>81</td>
<td>79</td>
<td>86</td>
<td>110</td>
<td>103</td>
<td>109</td>
<td>104</td>
</tr>
<tr>
<td>Ease of pedestrian movement around the centre</td>
<td>87</td>
<td>97</td>
<td>100</td>
<td>59</td>
<td>62</td>
<td>91</td>
<td>71</td>
</tr>
<tr>
<td>The level of personal security and safety</td>
<td>80</td>
<td>74</td>
<td>87</td>
<td>101</td>
<td>83</td>
<td>100</td>
<td>69</td>
</tr>
</tbody>
</table>

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 200, 100, 0, -100, and -200 respectively and an average score was then calculated.

4.46 Figure 4.4 above shows that Worcester city centre is the only centre to receive positive scores on all the various aspects of the centre. However, all the town centres in the Sub-Region are generally perceived in high regard by residents. All centres perform well in terms of their service function, environmental quality, accessibility by car, ease of pedestrian movement and personal security.
4.0 Existing Shopping Facilities

4.47 Accessibility by public transport is negatively perceived in the two smallest centres – Tenbury Wells and Upton upon Severn. Residents thought the range and choice of leisure and entertainment facilities in Evesham and Droitwich Spa were poor. Great Malvern received the lowest score for the range and choice of non-food shops, and Pershore received the lowest score for choice and quality of supermarkets.
5.0 The Need for Additional Retail Floorspace

Introduction

5.1 This section provides a summary of the need for additional floorspace in the sub-region having regard to the following:

- The quantitative analysis contained within the individual Town Centre and Retail Studies prepared for the three administrative areas, and based on the results of the household telephone surveys; and
- The qualitative assessment of retail provision in each administrative area, again described in the individual studies.

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

The City of Worcester

5.3 There is no need for additional convenience goods floorspace in the Worcester over the period to 2026, with the exception of improvements to foodstore provision within centres which should be encouraged in line with a strategy to enhance the vitality and viability of those centres.

5.4 There is a need for additional comparison goods floorspace in City. The broad estimate of requirements for non-food floorspace over the plan period is as follows:

<table>
<thead>
<tr>
<th>Year</th>
<th>Square Meters</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>1780 sq.m. net sales</td>
</tr>
<tr>
<td>2017</td>
<td>14,650 sq.m. net sales</td>
</tr>
<tr>
<td>2026</td>
<td>50,140 sq.m. net sales</td>
</tr>
</tbody>
</table>

Wychavon District

5.5 There is no overriding need for additional convenience goods floorspace in the District in the short to medium term, with the exception of improvements to food store provision within the town centres which should be encouraged in line with a strategy to enhance the vitality and viability of those centres.

5.6 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:
5.0 The Need for Additional Retail Floorspace

<table>
<thead>
<tr>
<th>Location</th>
<th>2012</th>
<th>2017</th>
<th>2026</th>
</tr>
</thead>
<tbody>
<tr>
<td>Evesham</td>
<td>up to 1990 sq.m.</td>
<td>up to 6,800 sq.m.</td>
<td>up to 16,500 sq.m.</td>
</tr>
<tr>
<td>Droitwich Spa</td>
<td>210 to 930 sq.m.</td>
<td>590 to 1860 sq.m.</td>
<td>1910 to 5290 sq.m.</td>
</tr>
<tr>
<td>Pershore</td>
<td>290 to 910 sq.m.</td>
<td>780 to 1600 sq.m.</td>
<td>1731 to 3880 sq.m.</td>
</tr>
</tbody>
</table>

*Net floorspace figures*

**Malvern Hills District**

5.7 There is no overriding need for a new food store in the District over the period to 2026 having regard to both quantitative and qualitative factors, with the exception of improvements to food store provision within centres which should be encouraged in line with a strategy to enhance the vitality and viability of those centres.

5.8 There is a need for additional comparison goods floorspace in the District, particularly in Malvern. The forecasts of floorspace requirements in Upton upon Severn and Tenbury Wells do not warrant specific allocations but new retail development as part of mixed-use sites in those centres should be encouraged.

5.9 The broad estimate of requirements for non-food floorspace in Malvern over the plan period is as follows:

<table>
<thead>
<tr>
<th>Year</th>
<th>Floorspace</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>2,250 sq.m.</td>
</tr>
<tr>
<td>2017</td>
<td>4,670 sq.m.</td>
</tr>
<tr>
<td>2026</td>
<td>11,340 sq.m.</td>
</tr>
</tbody>
</table>

**Long-Term Forecasts**

5.10 Whilst the Studies address retail ‘needs’ over the period to 2026, it is important to place a strong caveat on long-term forecasts of floorspace requirements. As with all forecasts, their reliability diminishes over time. As previously mentioned, retailing is a dynamic industry. Experian and MapInfo, recognised as experts within the industry, only provide forecasts of expenditure growth in the next decade. PPS6 also urges caution over long-term forecasts and recommends frequent updates of retail needs assessments based on the most up-to-date information.
5.0 The Need for Additional Retail Floorspace

5.11 It is difficult to imagine how most large town and city centres in the UK can accommodate the floorspace requirements which are being forecast for 15-20 years ahead based on current assumptions of expenditure growth, non-store sales, and sales efficiencies.

5.12 Even if retail interest was strong and significant levels of investment were forthcoming, a major expansion of large centres in the UK every 5 to 10 years to meet the forecast floorspace requirements is likely to serious implications. For example, new developments may shift the balance of centres, resulting in lower levels of vitality in the older parts of the centre. Instead of attracting new retailers, existing retailers may simply move to newer premises.

5.13 Therefore, it is recommended that in identifying sites or opportunities for new retail development, caution should be taken over the 2026 forecast and the 2017 forecast should be seen as a broad guide to the likely requirement.
6.0 Leisure Facilities

Introduction

6.1 This section summarises the potential for additional commercial leisure facilities in each administrative area. A fuller description of existing facilities, together with a review of trends in the industry, can be found in the individual Town Centre and Retail Studies.

The City of Worcester

6.2 It is considered that Worcester is strong on arts and ‘traditional’ cultural facilities but also has a good range of more contemporary commercial leisure facilities. A broad range of bars, restaurants and clubs has also been identified in the city centre. Worcester has a choice of serviced accommodation for visitors in keeping with its role as a tourist destination and for business and conference uses.

6.3 While the Council could seek to encourage a specific, large-scale commercial leisure development to the city centre (e.g. an ice rink), the implementation would be out of its hands and we do not see the value of identifying sites for such development for two main reasons. Firstly, 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.

6.4 There opportunities for growth within and on the edge of the city centre. The larger opportunities would be suitable for a range of town centre uses including leisure uses. However, to specify the type of leisure use would risk sterilising potential sites and tend to pre-determine the content and character of the rest of the development rather than allowing the package to be assessed as a whole.

Wychavon District

6.5 The three main towns in Wychavon have a range of 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.
6.0 Leisure Facilities

6.6 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).

6.7 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.

6.8 It is considered 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.

Malvern Hills District

6.9 Malvern Hills District, as a whole, is strong on arts and ‘traditional’ cultural facilities but also has a reasonable range of more contemporary commercial leisure facilities relative to the size of towns within it. Malvern has a reasonably broad range of bars and restaurants, but the range and choice of leisure and entertainment facilities in Tenbury Wells and Upton upon Severn is not rated highly by residents.

6.10 The District has a choice of serviced accommodation for visitors in keeping with its role as a tourist destination.

6.11 Overall, there are some deficiencies in commercial leisure provision across the District and it is recommended that new uses should be encouraged, appropriate in scale to the roles of Malvern, Upton upon Severn and Tenbury Wells, as part of mixed-use development sites within, or close to, the town centres.
7.0 Opportunities for Further Retail and Leisure Development

Introduction

7.1 This section provides a strategy for meeting the identified need for additional retail and leisure development across the sub-region. It comprises an assessment of potential areas which could accommodate additional retail and leisure development.

7.2 Potential areas to accommodate additional development have been identified and assessed following discussions with officers at Worcester City Council, Wychavon District Council and Malvern Hills District Council, having regard to existing retail or mixed use allocations in the local plan, and on the basis of our own surveys. 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.

City of Worcester

7.3 In the context of a forecast rise in population and expenditure growth within the catchment area, there is a need for additional comparison goods floorspace in the Worcester over the period to 2026. There will be a significant amount of new comparison goods floorspace constructed at Lowesmoor as part of the planning consent (around 8,000sq.m.net). However, forecasts suggest that about a further 15,000sq.m.net will be required over the next 10 years. This level of additional provision will help maintain Worcester’s market share of expenditure in the sub-region in the face of strong and increasing competition from other towns and cities including Birmingham and Cheltenham. Improvements in the range and choice of comparison goods provision are likely to be required to bolster the vitality and viability of the city centre.

7.4 Ideally, the need for additional comparison goods floorspace should predominantly be addressed through a small number of large sites rather than a large number of small sites. Concentrating the majority of new retail development in one or two areas will help to achieve the ‘critical mass’ of retail floorspace necessary to attract investment. New retail development should either be within or well-related to the existing Primary Shopping Area.

7.5 In this context, the current allocated site at Cathedral Plaza should remain a priority in terms of attracting a redevelopment which provides further (or better quality) retail floorspace and achieves environmental improvements in this area.
7.0 Opportunities for Further Retail and Leisure Development

7.6 It is very unlikely that, taking account of the floorspace lost, the redevelopment of Cathedral Plaza could physically accommodate the amount of additional floorspace required over the next ten years (15,000 sq.m.).

7.7 Therefore, in addition to the existing allocation, there are areas of opportunity to the west of the city centre which offer significant redevelopment potential to expand the retail offer and create good linkages with the existing Primary Shopping Area.

7.8 The area incorporates many existing uses (including the fire station and Worcestershire College of Technology) and is in multiple ownership. However, redevelopment of this area would provide an opportunity to significantly improve linkages between the city centre’s shopping area and the banks of the River Severn. Linkages are currently poor and, as such, the river is an under-used asset. The riverbank public realm has received considerable investment in recent years and improving accessibility will enhance the visitor’s enjoyment of the city centre.

7.9 Obviously, there is much to consider, not least the feasibility and implications of relocating existing occupiers (the diversity of uses in the city centre is a contributing factor in its vitality and viability). And the potential of other sites around the city centre should also be thoroughly investigated. Given the likely complexity of site assembly on such sites, and the importance of achieving a high-quality physical environment, opportunity sites would benefit from the production of a development brief to facilitate their promotion. The Council should also consider adopting a brief as SPD to provide developer certainty on sites. On larger sites, design will also be an important factor in ensuring that a mix of unit sizes is provided to suit modern retailer requirements and the retail element of redevelopment proposals should be pedestrian-friendly and create a retail ‘loop’ breaking through to the existing Primary Shopping Areas.

Wychavon District

7.10 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.
7.0 Opportunities for Further Retail and Leisure Development

**Evesham**

7.11 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.

7.12 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.

7.13 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.

7.14 Redevelopment of this site will no doubt be costly 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.

7.15 Whilst there is a clear quantitative need for additional comparison goods floorspace (up to 6,800 sq.m. by 2017), the site would also be suitable for convenience goods shopping as this would broaden the choice of food stores 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 comparison goods floorspace which would help address the identified need.
South Worcestershire
Town Centres & Retail Strategy

7.0 Opportunities for Further Retail and Leisure Development

7.16 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.

7.17 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 considering the use of compulsory purchase 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_

7.18 The quantitative needs assessment indicates that by 2012 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 1,870 sq.m.net by 2017, assuming a reasonable increase in the town's current market share of expenditure.

7.19 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.

7.20 Development on land between Saltway, Covercroft, Winnetts Lane, and Priory Lane should retain, refurbish or replace the existing supermarket, as the choice of food stores 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.
7.0 Opportunities for Further Retail and Leisure Development

7.21 In accordance with the strategy suggested as part of the 2006 Study, the Council has undertaken work with the site owners – Kandahar Real Estate Ltd – to produce a development brief for the site. The brief, which will be completed in late 2007, will guide any future applications on the site.

**Pershore**

7.22 This study has identified a need for very modest levels of additional comparison goods floorspace in Pershore by 2012. By 2017, the floorspace requirement increases to between 800 – 1,600 sq.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.

7.23 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.

7.24 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, the Co-Op and the Leisure Centre on King Georges Way.

7.25 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.
7.0 Opportunities for Further Retail and Leisure Development

Malvern Hills District

**Malvern**

7.26 Forecasts suggest that over 4,700sq.m.net comparison goods floorspace will be required over the next 10 years. This level of additional provision will help maintain Malvern’s current market share of expenditure in the sub-region in the face of strong and increasing competition from other towns and cities including Worcester, Hereford and Cheltenham. Improvements in the range and choice of comparison goods provision are likely to be required to bolster the vitality and viability of the town centre and encourage local residents to visit more often.

7.27 As the primary centre within the Malvern retail hierarchy, Great Malvern town centre should be the focus for new retail development to meet the needs of residents in Malvern and its wider catchment area. New retail development within Barnards Green and Malvern Link district centres should be encouraged through planning policies but new development should be in keeping with the role of those centres, serving the needs of small, local catchment areas.

7.28 The need for additional comparison goods floorspace should ideally be met through one or two large sites rather than a large number of small sites which could only accommodate one or two shops. Concentrating new retail development in one or two areas will help to achieve the ‘critical mass’ of retail floorspace necessary to attract investment. New retail development should either be within or well-related to the existing Primary Shopping Area of Great Malvern to ensure that it functions as part of the existing centre rather than a free-standing destination with no benefit to the town centre.

7.29 In this context, the current allocated site at Edith Walk should remain a priority in terms of attracting a redevelopment which provides further retail floorspace and achieves environmental improvements in this area. *Prima facie*, this is a difficult site to develop as the site is in multiple ownership, there is constrained vehicular and pedestrian access, and the site is on a steep gradient. Therefore, it is recommended that the local planning authority take a strong lead in bringing this site forward for development. Steps could include preparing a development and design brief, establishing an agreement with landowners in principle, and possibly consider the use of compulsory purchase powers.

7.30 It is very unlikely that the site at Edith Walk could physically accommodate the amount of floorspace required over the next ten years (c. 4,700 sq.m.).
South Worcestershire
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7.0 Opportunities for Further Retail and Leisure Development

7.31 Therefore, in addition to the existing allocation, it is recommended that the local planning authority examines the possibility of redeveloping the Postal Sorting Office at the top (western) end of Church Street. Providing an alternative site can be found for the existing uses (and the Post Office is retained as part of the redevelopment) then this site represents an excellent opportunity to provide additional retail floorspace and improvements to the public realm in the busiest part of the town centre.

_Upton upon Severn and Tenbury Wells_

7.32 There is a need for only very modest levels of retail development in Tenbury Wells and Upton upon Severn. The forecasts of floorspace requirements in these towns do not warrant specific allocations but new retail development as part of mixed-use sites in those centres should be encouraged.

_Out-of-Centre Retailing in the Sub-Region_

7.33 The areas previously identified in or on the edge of existing centres can accommodate the need for additional retail development. There is no need to allocate additional sites for retail development in out-of-centre locations. Policies in the development plan documents should direct all retail development towards the city and town centres in accordance with their role in the hierarchy, and to district centres where appropriate in scale.

7.34 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.
Appendix A

Plan showing Study Area and Survey Zones
This drawing is to be read in conjunction with all other drawings, specifications or schedule of works.

Study Area and Survey Zone Plan

Malvern Hills District Council
Worcester City Council
Wychavon District Council

South Worcestershire Town Centre & Retail Strategy