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# Cannock Chase Retail & Town Centre Uses Study

## January 2021

Volume 1 of 2 – Main Report



# Contents

# Appendices

# Glossary of Terms

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|---|---|
| Capacity | Retail capacity in terms of this report refers to surplus/deficit of expenditure (£m) which represents the difference between the expenditure and turnover of the identified facilities. |
| CTN | Shops selling Confectionary, Tobacco and newspapers |
| Comparison Goods | Comparison goods relate to items not obtained on a frequent basis, these include clothing, footwear, household and recreational goods. |
| Convenience Goods | Convenience goods relate to everyday essential items including confectionary, food, drinks, newspapers and magazines. |
| District Centre | District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library. |
| Expenditure Per Capita | The average spend of each person within the defined Study Area on a variety of retail goods. |
| Expenditure | Expenditure is calculated by taking the population within a defined area and then multiplying this figure by average annual expenditure levels for various forms of goods. |
| Expenditure Forecasts | This assessment has been undertaken using the 'goods based' approach as prescribed in the Planning for Town Centres Practice Guidance. Retail expenditure forecasts have been derived from Experian Retail Planner Briefing Note 18 (November 2020). |
| Experian (MMG3) | The database used to identify population, expenditure and socio-economic breakdown of the Study Area population. |
| Gross Floorspace | Represents the level of total floorspace or footprint of a specific development (i.e. sales area, storage, checkouts, café, display, and so on). |
| GOAD Plans | Provide accurate information on the composition of town centres, shopping areas, out-of-town retail parks and outlet villages in the UK. Identifies the fascia name, retail category, floorspace and exact location of all retail outlets and vacant premises. |

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| GOAD Reports | Provide a snapshot of the retail status or demographic make-up of Goad surveyed town centres. Provides a comprehensive breakdown of floorspace and outlet count for all individual trade types in the Convenience, Comparison, Retail Service, Leisure, Financial/Business Services and Vacancy sectors. |
| Local Centre | Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a local centre. |
| Net Floorspace | Represents the level of internal area devoted to the sale of goods. |
| Market Share | Market shares derived from the household survey results, which are based on either the proportion of shopping trips or the proportion of expenditure attracted to a particular centre/facility. |
| National Multiple | This is a retail or service operator which is or part of a network of nine or more outlets. |
| Price Base | The price base for the Study is 2018; all prices are or have been adjusted to 2018 in order to be consistent. |
| Rates of Productivity | This takes into account the potential for existing retail floorspace to improve their turnover productivity (e.g. smaller goods could be sold from a smaller area for more money, increased opening hours, etc.). |
| Sales Density | Retail capacity figures are expressed in term of floorspace, relying on the application of assumed sales density figures to the surplus expenditure identified. This is based on the typical turnover of a store by square metre/foot. |
| Special Forms of Trading | Defined by Experian as expenditure not directed to traditional floorspace such as the internet, mail order, party plan and vending machines and other non-store activity such as market and road-side stalls. |
| Study Area | This represents the household survey area, which is based on postal sectors. |
| Trade Draw | This refers to the level of trade attracted to a particular facility/centre. |
| Turnover | The turnover figure relates to the annual turnover generated by existing retail facilities. |

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

# 1.0 Introduction

## 1.1 Brief

1.1.1 WYG Planning ('WYG') has been commissioned by Cannock Chase Council to undertake a Retail and Town Centre Uses Study for Cannock Chase District. The key purpose of this Study is to act as the evidence base to assist in the formulation of future development plan policy to sustain and increase the vitality and viability of the town centres across the district as well as providing baseline information to assist in the determination of planning applications for potential retail and leisure development. The Study supersedes the previous Retail and Leisure Study which was also produced by WYG and was published in November 2015 (The 2015 Study).

1.1.2 This Study will be used to inform policy in the emerging Local Plan which is anticipated to be adopted in July 2022 and will identify how land is used and help determine what will be built where.

## 1.2 Aims & Objectives

1.2.1 The main objective of this Study is to provide a National Planning Policy Framework (NPPF[1]) (June 2019) and National Planning Policy Guidance (NPPG[2]) compliant Retail & Town Centre Uses Study, which provides the Council with an up-to-date objective assessment of retail, leisure and other town centre development needs, together with a clear understanding of retail and leisure provision and potential strategic responses/recommendations.

1.2.2 The Study explores retail and commercial leisure need over a twenty year period to 2040 and provides an up to date review of the performance of the three town centres across the District. The objectives of the Study are to:

- review relevant national and local retail and leisure planning policy as a context for the Study;
- review relevant demographic, economic and commercial retail and leisure trends and forecasts identifying current and future challenges to the town centres across the District;
- assess the heath of Cannock, Rugeley and Hednesford Town Centres;
- identify current shopping patterns relating to convenience and comparison goods, food and beverage, cultural and leisure offer across the District and identify deficiencies in provision;
- identify the future capacity/quantitative need for development and services in each of the town centres;

[1] https://www.gov.uk/government/publications/national-planning-policy-framework--2
[2] https://www.gov.uk/government/collections/planning-practice-guidance

- review and, if necessary, propose amendments to the thresholds for retail impact assessments identified in the 2015 Study;
- provide a review of the defined retail frontages and boundaries;
- review the town centre boundaries for effectiveness and appropriateness; and
- provide recommendations on a retail and commercial leisure strategy/vision for the town centres within the District.

1.2.3 This Study is underpinned by several pieces of new empirical research. First, we have commissioned NEMS Market Research to undertake a new shopping survey of 1,100 households. The Study Area for the survey comprises 11 zones which are based on postcode areas grouped around one or more of the existing town centres. The survey area is the same as that adopted in the 2015 Study.

1.2.4 The second area of empirical research has been in relation to the assessment of the health of Cannock, Rugeley and Hednesford Town Centres. This exercise has incorporated land use surveys of these defined centres, along with a review of health check indicators and an appraisal of the qualitative results of the household survey data.

1.2.5 The third area of empirical research undertaken has been a survey of business operators in each town centre to obtain their views on existing town centre strengths, weaknesses, opportunities and threats alongside potential suggested town centre improvements. The results will help inform our health check assessments of each town centre and will provide valuable comparison with results of previous surveys undertaken in support of previous studies.

1.2.6 The Study is also informed by industry research having regard to published recognised retail and leisure data including demand/requirements from retail and leisure operators for presence in the defined town centres.

1.2.7 Finally, in accordance with the duty to cooperate, WYG has worked with the Council to contact local planning authorities in order to identify existing retail, commercial leisure and town centre use commitments and proposals within competing centres which could have the effect of enhancing their retail, commercial leisure and town centre offer.

## 1.3 Structure of Study

1.3.1 Our Study is structured as follows:

- Section 2 - summarises the current national and local planning policy context for retail and leisure development issues in Cannock Chase District;
- Section 3 - provides a context for the Study by summarising the current and emerging key retail and leisure trends in the UK;

- Section 4 - sets out the key market research which informs the Study;
- Section 5 - analyses the socio-demographic and sub-regional context of the study area;
- Section 6 - contains a summary of our analysis of Cannock. This includes an examination and analysis of retail patterns and market shares, a quantitative assessment of future retail and leisure needs for the town and a summary of our qualitative vitality and viability assessment of the town centre.
- Section 7 - provides a summary of our analysis for Rugeley, including an examination and analysis of retail patterns and market shares, a quantitative assessment of future retail and leisure needs for the town, and a summary of our qualitative vitality and viability assessment of the town centre.
- Section 8 - sets out our analysis for Hednesford, including an examination and analysis of retail patterns and market shares, a quantitative assessment of future retail and leisure needs for the town, and a summary of our qualitative vitality and viability assessment of the town centre.
- Section 9 - summarises our key findings, policy review, and sets out our recommendations.

# 2.0 Planning Policy Context

## 2.1 Introduction

2.1.1 Given that this Study seeks to provide evidence to assist in the production of the Councils' new Local Plan, it is important to review existing national planning policy of pertinence to retail, leisure and town centre matters to explore the context for the Study and how it may impact upon the production of future development plan policy.

2.1.2 This section also provides an overview of the Council's policies, insofar they are relevant to retail and town centre matters. A more detailed review of relevant national and local planning policy is also contained at **Appendix A**.

## 2.2 National Planning Policy

2.2.1 National Planning Policy for England is contained within the National Planning Policy Framework (NPPF) (June 2019). The main theme of the NPPF is that there should be 'a presumption in favour of sustainable development'.

2.2.2 The NPPF recognises the need to ensure the vitality and viability of towns and cities and support the role that they play at the heart of local communities by taking a positive approach to their growth, management and adaption.

2.2.3 Paragraphs 86 and 89 respectively, require local planning authorities to adopt a sequential approach and require an impact assessment (if the development is over a proportionate, locally set threshold) for retail and commercial leisure development outside of town centres which are not in accordance with an up-to-date Local Plan.

## 2.3 Local Planning Policy Context

2.3.1 The adopted development plan for Cannock Chase District is the Cannock Chase Local Plan Part 1 (LPP1) which was adopted in June 2014. This document incorporates the Core Strategy for the District within Section 1, and an Area Action Plan for Rugeley Town Centre at Section 2.

2.3.2 The main retail and town centre policies of relevance within the LPP1 are as follows:

<u>Policy CP1: Strategy</u>

2.3.3 This policy sets out a strategy for the distribution of development across the District. It is explained that comparison retail will mainly be concentrated in Cannock town centre, whilst the defined centres of Rugeley and Hednesford will also accommodate some convenience and comparison retail.

Policy CP3: Chase Shaping - Design

2.3.4 This policy sets out several placemaking principals that that should be adhered to in order to create high quality buildings and spaces. Town and local centres are targeted as being able to provide opportunities to improve the quality of open space and to design out crime and anti-social behaviour. The policy sets requirements for design within developments which include promoting active frontages and high-quality public space within centres to ensure that they are well used and cared for and provide convenient and attractive town centre parking. Another key requirement is to maximise accessibility and mobility to create a network of attractive and well-connected spaces in sustainable locations for the benefit of pedestrians, cyclists, and other road users.

Policy CP9: A Balanced Economy

2.3.5 This policy provides that the Council will deliver a balanced, resilient and diverse economy. As well as catering for a changing employment and manufacturing market, the District will also support a range of proposals for tourism and retail growth

Policy CP11: Centres Hierarchy

2.3.6 The policy sets out the hierarchy of centres in Cannock Chase District as follows:

- Strategic Sub-Regional Centre – Cannock
- Town Centres – Rugeley and Hednesford
- District Centre – Hawks Green
- Local Centres – Norton Canes, Heath Hayes, Chadsmoor, Bridgtown, Fernwood Drive and Brereton.

2.3.7 This policy also sets specific strategies for the centres of Cannock, Rugeley and Hednesford as well as overarching policies for the district and local centres. Appropriate growth levels for town centre uses are set based upon evidence available at the time of publication, and the policy also sets out the requirement to take a sequential approach for town centre uses in their local context including retail, office, commercial, leisure and cultural facilities to ensure that priority is given to regeneration within town centres.

2.3.8 An Area Action Plan for Rugeley is referenced within Policy CP11 which is expanded upon later in the plan. For Cannock, the policy sets out that development in the town centre will be guided by a Supplementary Planning Document or Area Action Plan.

Policy CP15: Historic Environment

2.3.9 This policy requires developments in Rugeley town centre to provide contributions towards a heritage-led town centre regeneration programme. In addition, Cannock town centre's built heritage will provide the focus for development opportunities to contribute to place making, whilst Hednesford's locally distinctive character and appearance will also be enhanced and supported through a Design SPD.

Rugeley Town Centre Area Action Plan

2.3.10 The Rugeley Town Centre Area Action Plan (AAP) forms the second part of the Local Plan Part 1 document. The AAP is broken down into three parts containing strategic policies for the centre, site specific policies, and broader policies aiming to improve the public realm, transport and flood alleviation measures. Policies of specific relevance to the study are summarised below:

2.3.11 Policy RTC1 aims to consolidate and improve the historic core of the town centre, whilst also promoting new growth around the Trent and Mersey Canal to the east.

2.3.12 Policy RT2 sets out the land uses which are to be supported within the town centre. It aims to create a mixed community of business uses with residential uses above. This policy also encourages the development of cultural and leisure facilities in the town centre.

2.3.13 Policies RTC4 to RTC8 set out a series of site-specific policies for the town centre. These include the desired redevelopment of the Market Hall and Bus Station (Policy RTC6), the support for new retail development at Land at Wellington Drive (Policy RTC7) and proposals to improve accessibility to the Trent and Mersey Canal from the town centre (Policy RTC8).

**Emerging Planning Policy**

2.3.14 The Council is currently preparing a New Local Plan for Cannock District which will replace the existing LPP1. The emerging plan is still in the relatively early stages of production and it is understood that it is targeted for adopted in July 2022.

2.3.15 The latest round of consultation on the emerging plan took place between May and July 2019. The Issues & Options consultation document set out four options to deliver an objective of creating attractive town centres in the District;

- Option A sought to retain the existing hierarchy of centres (set out in existing LPP1 Policy CP11) but with updated policy wording;
- Option B set out an approach similar to Option A but with a policy setting out retail impact thresholds for town centre uses in out of centre locations;
- Option C would provide separate Area Action Plans for Cannock, Hednesford and Rugeley; and

- Option D supported the preparation of local policy to direct investment into centres via a range of appropriate means (i.e. masterplan, prospectus, SPDs, neighbourhood plans)

**Hednesford Neighbourhood Plan**

2.3.16 The only 'made' neighbourhood plan within Cannock is the Hednesford Neighbourhood Plan (HNP). The plan was formally made in November 2018 and covers the plan period 2017-2028. It forms part of the adopted Local Development Plan for Hednesford. The HNP sets out several policies relevant to Hednesford Town Centre (TC1-TC7), covering the protection of the centre's historic character, active frontages and upper floor uses, enhancements to public areas and accessibility, and new development of residential uses suitable for the elderly.

## 2.4 Summary

2.4.1 National planning policy highlights the need to promote the vitality and viability of town centres through a town centre first approach and a defined hierarchy of centres. Applicants for main town centre uses are required to pass the sequential approach to site selection and provide a full assessment of the impact on the vitality and viability of protected centres. The Cannock Chase Local Plan follows the general trend of the most recent national policy guidance, identifying a hierarchy of centres and the town centre first approach.

2.4.2 As required by this commission, policy recommendations on the basis of updates to the evidence base and national guidance are provided in Section 9.

# 3.0 Current/Future Retail & Commercial Leisure Trends

## 3.1 Introduction

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

## 3.2 Economic Context

3.2.1 Covid-19 has had a considerable impact on the UK economy. During lockdown the economy suffered an unprecedented contraction and employment fell significantly. Consumer demand suffered given social distancing and low confidence, leading to a big drop in social consumption, especially for recreation, leisure and travel.

3.2.2 The near-term outlook for consumer spending is weak and despite the news of vaccines, economists do not expect pre Covid 19 pandemic levels to be reached until at least the end of next year (2021). In terms of the medium to longer term outlook, it is expected that the recovery will be shaped by the course of the pandemic, Brexit arrangements, and the extent of potential scarring of both to the UK's longer-term economic potential.

## 3.3 Increased Vacancy Levels and Store Closures

3.3.1 In the first half (H1) of 2020 there was a net loss of 7,834 stores across Great Britain compared with a 3,647 stores loss over the equivalent period in 2019 and 4,402 in 2018. Closures increased by 21% from 2019-2020 with 31,139 shops closing. The comparison goods sector declined the highest in H1 2020 with a net loss of 4,975 units. Independent businesses have been more resilient than national multiples in H1 of 2020 with the decline lower across all four sectors. Many retailers have found themselves struggling to pay their rents and other overheads. This, together with consumers doing more of their shopping online, which has been compounded by Covid-19, has resulted in a large number of retailers, over the last two years, including Debenhams and Arcadia, restructuring or going into administration.

3.3.2 Vacancy rates in town centres has been increasing since 2017 from 11% to 13%. The vacancy rate for both retail and leisure is forecast to increase further with retail anticipated to see a higher increase. The increase in vacancies was already apparent before the Covid-19 with the pandemic accelerating the level.

## 3.4 The Continue Rise of the Grocery Discounters

3.4.1 Consumers have changed their shopping habits over the last 5 or so years, turning away from food superstores to discount grocers (principally Aldi and Lidl), who are benefitting from increases in their market share. The discount grocers continue to have ambitious store opening targets in the coming years whilst the 'Big Four Grocers' look to continue to develop their smaller 'top-up shopping' store formats and reconfigure/refurbish their existing stores to include concessions.

## 3.5 The Leisure Sector

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

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

## 3.6 Governments Response to 'Transform Town Centres'

3.6.1 The Government recognises that town centres are under pressure and has commissioned various studies over the last several years. In the last 2 years the Government has bought about a number of measures in response to the challenging retail/economic climate and the ongoing Covid-19 pandemic.

3.6.2 These measures include:

- business rate relief to small business;
- a new digital tax;
- funding to support town centres such as the 'Towns Fund' (which comprises the 'Stronger Towns Fund' and 'Future High Street Fund');
- the setting up of the High Streets Task Force;
- additional funding for Business Improvement Districts in response to COVID-19;
- changes to the GDPO; and
- changes to the Use Class Order.

3.6.3 The purpose of the measures is to help revitalise town centres, allowing them to diversify and adapt more quickly to change.

3.6.4 One of the most significant change that the Government has recently introduced which is likely to impact town centres is the change to the use classes order. The changes, *inter alia*, replace the existing Use Classes A1-5 and D1 & D2 and introduce new Class E 'Commercial, Business and Service' and Class F1 'Learning and Non-Residential Institutions' and F2 'Local Community' use classes. These changes are intended to allow greater flexibility in uses in town centres allowing for units to be re-occupied quicker and to change use quickly without requiring planning permission. The changes take control away from Local Planning Authorities and give more freedom to allow the market to decide. This could result in the retail core of some town centres being diluted with other uses potentially weakening its pull as a comparison goods retail destination.

**Funding to Support Town Centres**

3.6.5 The Government's 'Towns Fund' (which comprises the 'Stronger Towns Fund' and 'Future High Street Fund') involves a total fund of £3.6bn to support struggling town centres. The 100 towns eligible for support from the fund include places with industrial and economic heritage but have not benefitted from economic growth in the same way as more prosperous areas.

3.6.6 Plans are to be drawn up by communities, businesses and local leaders with the purpose of transforming their town's economic growth prospects focusing on improved transport, broadband connectivity, skills and culture.

3.6.7 A total of £241m is available to support towns in 2020-2021, and the 100 towns can bid for up to £25m each.

## 3.7 Potential Impact of Trends on Centres within Cannock Chase

3.7.1 The District's town centres continue to face a number of challenges, which have been compounded by the Covid-19 pandemic. These challenges will have a significant impact on the performance, vitality, viability and the future strategies of centres.

3.7.2 It is important that the District's town centres are able to respond to continued changes in the retail and leisure sector and that they provide (or continue to provide) an offer/destination which distinguishes them from competing centres and out-of-centre retail and leisure destinations.

3.7.3 Centre Strategies need to be able to support the continued development/changes in the 'high street' if they are to successfully compete. Such strategies may seek to:

(1) provide a good mix/variety of retail and leisure uses;

(2) attract a mix of additional land uses beyond retail/leisure, including residential, educational, community and office uses;

(3) support and improve existing cultural/heritage/tourist attractions;

(4) enhance existing town centre markets and speciality retailing;

(5) provide a high quality shopping/leisure experience;

(6) provide convenient, affordable and accessible town centre parking;

(7) promote and encourage events in the town centre;

(8) embrace, and not compete against, multi-channel retailing; and

(9) be responsive to changes in technology (the 'digital high street').

3.7.4 The key purpose of Town Centre Strategies should be to seek to build on the existing individuality of centres, ensuring centres are a focus/hub for their communities, and extend the 'dwell time' and spend of visitors/residents visiting the town centre which in turn will support their vitality and viability

# 4.0 Original Market Research

## 4.1 Introduction

4.1.1 This study is informed by some areas key original market research. The these include:

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

## 4.2 Telephone Household Survey

4.2.1 A key requirement of this Study is the detailed research and understanding of shopping and leisure patterns in terms of the use of centres and the identification of the centres' catchment areas and this is informed by a telephone household survey.

4.2.2 WYG commissioned specialist market researchers NEMS to undertake a comprehensive household telephone survey to identify consumers' habits and preferences within the Study Area. The undertaking of original market research enables in-depth analysis at a local level and allows the evaluation of the trade draw of particular town centres. The use of specifically commissioned and tailored survey research is fundamental to identifying the likely capacity for future retail and leisure needs across the district. Nevertheless, WYG acknowledges that there can be limitations to survey research, particularly with regard to the sample size which can be achieved. The results should therefore be viewed as a broad indication of consumer preferences.

4.2.3 The household survey was undertaken during October and November 2020. The survey involved 1,100 households across a defined Study Area which comprises 11 separate zones, based on postcode sectors. For ease of comparison, both the Study Area and survey zones match those used in previous retail studies. The survey area is shown below at Figure 4.1, while Figure 4.2 details the postcode sectors which make up the survey zones.

**Figure 4.1: Study Area**

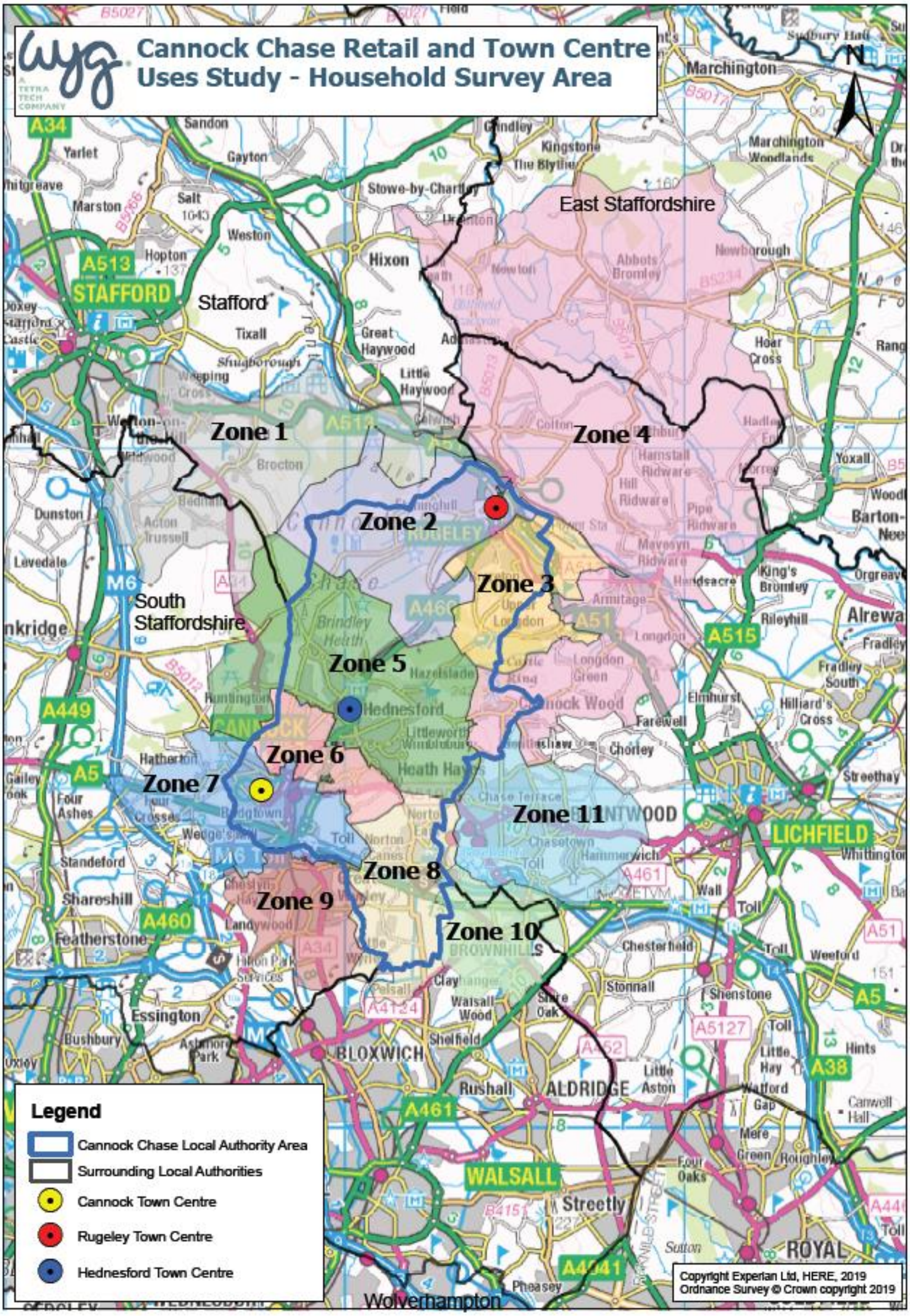


**Figure 4.2 Postcodes by Survey Area**

| Survey Zone | Postcode Sector |
|---|---|
| Zone 1 – South East Stafford | ST17 0 |
| Zone 2 – West Rugeley | WS15 2 |
| Zone 3 – East Rugeley | WS15 1 |
| Zone 4 – Colton, Blithbury and Handsacre | WS15 3, WS15 4 |
| Zone 5 – Hednesford | WS12 0, WS12 1, WS12 2, WS12 4 |
| Zone 6 – North Cannock | WS11 4, WS11 5, WS11 6, WS11 7, WS12 3 |
| Zone 7 – Cannock | WS11 0, WS11 1, WS11 8 |
| Zone 8 – Norton Canes | WS3 5, WS11 9 |
| Zone 9 – Cheslyn Hay & Landywood | WS6 6, WS6 7 |
| Zone 10 - Brownhills | WS8 6, WS8 7 |
| Zone 11 – Burntwood & Chasetown | WS7 0, WS7 1, WS7 2, WS7 3, WS7, 4, WS7 9 |

4.2.4 Zones 2, 3, 5, 6, 7 and 8 of the study area broadly cover the District of Cannock Chase with Zone 2 incorporating Rugeley Town Centre, Zone 5 incorporating Hednesford, and Zone 7 incorporating Cannock Town Centre. In recognition that that the influence of the District's retail , leisure and other town centre uses will extend beyond the administrative boundary of Cannock Chase, the survey area covers areas to the north and east (Zone 4 and Zones 10 and 11) and west (Zones 1 and parts of Zones 5 & 7).

4.2.5 The results of the household survey, *inter alia*, are utilised to calculate the expenditure claimed by each existing retail facility within the Study Area. This process is considered later on in the study.

## 4.3 Business Survey and Stakeholder Engagement

4.3.1 In order to inform our qualitative analysis in this study, a town centre occupier/business survey has been carried out, alongside engagement with key stakeholders in each of the town centres.

4.3.2 A total of 469 information sheets were hand delivered across Cannock, Rugeley and Hednesford inviting occupiers of business and commercial units in each town centre to participate in the online survey. The survey, comprising 27 questions sought to establish views on existing town centre strengths, weaknesses, opportunities and threats alongside suggested town centre improvements. The questionnaire and information sheet are provided at **Appendix C.** Sections 6, 7 and 8 of this report examine the feedback and results in relation to each of the town centres respectively.

4.3.3 Separate engagement has also taken place with several other key stakeholders from across Cannock Chase District to further understand current demand and interest in the town centres, the impact of the ongoing Covid-19 pandemic, and to help identify potential opportunities to assist in town centre regeneration.

4.3.4 A list of stakeholders was provided by the Council which included representatives from Cannock, Hednesford and Rugeley Town Councils, and from Cannock Town Centre Partnership. Feedback from consultees is examined within Sections 6, 7 and 8 of this report.

# 5.0 Socio Demographics and Sub-Regional Context

## 5.1 Introduction

5.1.1 In order to provide context, this section provides an overview of the socio demographic context of the study area, sets out the sub-regional centre hierarchy, summarises the existing retail, leisure and town centre service provision across Cannock Chase District, and it then summarises the provision across the main competing surrounding centres.

5.1.2 A detailed analysis of the convenience and comparison goods retail market share patterns within the Study Area is provided at **Appendix D** and an analysis of existing leisure provision and leisure market share patterns is provided is set out in **Appendix E**.

## 5.2 Socio Demographic Context of Cannock Chase District

5.2.1 A population profiling exercise has been undertaken utilising the Experian Mosaic database to establish the socio demographic profile of the Borough. A national UK average is also provided to enable a comparative assessment to be undertaken. The breakdown and definition of each Experian Mosaic group is provided at **Appendix F**.

**Figure 5.1 – Experian Mosaic Profiling (%)**

| Mosaic Group | Cannock Chase District | UK Average |
|---|---|---|
| Population (Adults 18+) | 80,171 | - |
| | | |
| A: City Prosperity | 0 | 4 |
| B: Prestige Positions | 4 | 7 |
| C: Country Living | 1 | 7 |
| D: Rural Reality | 2 | 7 |
| E: Senior Security | 7 | 8 |
| F: Suburban Stability | 13 | 6 |
| G: Domestic Success | 8 | 8 |
| H: Aspiring Homemakers | 19 | 9 |
| I: Family Basics | 13 | 8 |
| J: Transient Renters | 7 | 6 |
| K: Municipal Challenge | 2 | 6 |
| L: Vintage Value | 7 | 6 |
| M: Modest Traditions | 14 | 5 |
| N: Urban Cohesion | 0 | 5 |
| O: Rental Hubs | 2 | 9 |
| U: Unclassified | 0 | 0 |
| **Total** | 100 | 100 |

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

5.2.2 The Experian Mosaic results highlight that when compared to the UK average, Cannock District contains:

- a much higher proportion of residents that fall within the 'Aspiring Homemakers' (younger and settled families in affordable/modest homes/fashion conscious young singles/partners setting up home/young singles renting in family suburbs) and 'Modest Traditions' (lower income homeowners) categories;
- a higher proportion of those that fall within the 'Suburban Stability' (those with mid-level incomes living in traditional suburban homes), 'Family Basics' (families who may struggle to cover all expenses) and 'Vintage Value' (dependent elderly renters/those in specialist accommodation/single elderly low value homeowners/longstanding elderly social renters) categories than the national average;
- a higher proportion of 'Transient Renters' (younger people making interim homes in low cost properties/singles renting short term affordable homes/transient renters of low-cost accommodation);
- a similar proportion of residents within the 'Domestic Success' category (professional singles, couples and families living in good quality housing)
- a slightly lower proportion that fall within the 'Senior Security' (retired couples living comfortably) and 'Prestige Positions' (families with substantial income/retired in sizeable homes/upmarket suburban homes/high achievers);
- a lower proportion of 'Municipal Tenants' (long term renters/older social renters/hard-pressed singles/multi-cultural household of social/low cost flats); and
- a much lower proportion of these that fall within the 'Country Living' (people living in expanding developments/affordable village homes/inexpensive housing/removed communities within rural locations) and 'Country Living' (prosperous families and older households/retired people living in country houses/small countryside villages) categories; and
- a much lower than average proportion of those falling within the 'Rental Hubs' category (younger renters living in City Centre flats/students living in high density accommodation/singles renting affordable private flats), and 'Urban Cohesion' category (those living in multi-cultural inner-city neighbourhoods/older people living in small inner suburban properties).

5.2.3 The Mosaic results generally highlight that Cannock Chase District generally has a high proportion of lower to middle income residents living in suburban neighbourhoods. Though there are rural areas in the District, there is a much lower proportion of those living in rural areas in the District than the national average.

5.2.4 It is important to note that the socio demographics of a catchment area of a town will, in part, have an impact on the quantum and type of retail and leisure demand in a town centre.

## 5.3 Sub-Regional Centre Rankings

5.3.1 Figure 5.2 illustrates the position of the principal centres within the hierarchy of centres based on Venuescore's UK Shopping Venue Rankings[3]. The index ranks over 3,000 retail venues within the UK (including town centres, stand-alone malls, retail warehouse parks and factory outlet centres) based on the current retail provision. Cities, towns and major retail centres are rated using a scoring system which takes account of the presence in each location of multiple retailers – including anchor stores, fashion operators and non-fashion multiples. The rankings in the table represents the position of the centres at the time of the most recent Rankings from 2017 as well as competing surrounding centres compared with rankings at the time of the last retail study in 2015. Whilst the data is a few years old now it is the latest published centre ranking data available and is a useful guide to understand whether within the period since the last study centres had improved their position in the UK ranking.

**Figure 5.2: Sub-regional Centre Rankings**

| Centre | Classification | 2014-15 Rank | 2016-17 Rank | Change in Rank 2015-2017 |
|---|---|---|---|---|
| Birmingham City Centre | Major City | 4 | 4 | - |
| Wolverhampton City Centre | Regional | 68 | 92 | -24 |
| Walsall Town Centre | Regional | 116 | 115 | +1 |
| Stafford Town Centre | Sub-Regional | 183 | 184 | -1 |
| Lichfield City Centre | Sub-Regional | 275 | 255 | +20 |
| Tamworth Town Centre | Sub-Regional | 261 | 289 | -28 |
| **Cannock Town Centre** | **Major District** | **456** | **508** | **-52** |
| **Rugeley Town Centre** | **Major District** | **549** | **608** | **-59** |
| **Hednesford Town Centre** | **Local** | **2,775** | **2,815** | **-40** |

*Source: VenueScore*

5.3.2 Figure 5.2 shows that in the latest rankings, Cannock and Rugeley are classified by VenueScore as 'Major District Centres', while Hednesford is classified as a 'Local Centre'. Between 2015 to 2017, each centre had fallen in the rankings; Cannock by 52 places, Rugeley by 59, and Hednesford by 40 places.

5.3.3 In the latest rankings the competing centres in the region all outrank those within Cannock District. Birmingham, classified as a 'Major City Centre' is ranked 4th in the UK by VenueScore. Wolverhampton, as a 'Regional Centre' had also seen its ranking decline in the period 2015-2017, as has Tamworth, a 'Sub-Regional Centre'.

[3] https://www.javelingroup.com/white_paper/white_paper_download_venuescore_2017/

5.3.4 Walsall, another 'Regional Centre' had shown a marginal increase in its ranking from 116th to 115th while Lichfield City Centre has increased by 20 places between 2015-2017.

5.3.5 The Rankings are reflective of the presence of national multiple retailers in a particular centre and are therefore a more accurate barometer of the performance of larger centres. Accordingly, towards the lower end of the Rankings, the importance of a centre can be overlooked or amplified based on whether a handful of national multiples are present or not.

## 5.4 Summary of Existing Retail Provision in Cannock Chase District

5.4.1 We provide below a summary of existing centre/retail provision in Cannock Chase District. Detailed assessments of the three town centres are provided in Section 6-8 of this study.

**Cannock Town Centre**

5.4.2 Cannock is the principal shopping and leisure destination in Cannock Chase and is located in the south west of the District. The town centre provides a mixture of retail, service and leisure facilities including some 31,960sq m gross retail floorspace, 4,130sq m retail service floorspace, 10,300sq m leisure service floorspace and 4,850sq m financial and business service floorspace (source: Experian Goad Survey).

**Rugeley Town Centre**

5.4.3 Rugeley is situated in the north of the District, some 10km from Cannock. The centre contains 198 retail and commercial leisure units, accommodating a total of 32,870sq m gross floorspace. Of the retail floorspace in the town centre, 6,520sq m is occupied by convenience retailers, 9,560sq m by comparison retailers and 3,670sq m by retail service providers. Additionally, 8,090sq m of floorspace is occupied by commercial leisure providers and 1,720sq m by financial and business service providers.

**Hednesford Town Centre**

5.4.4 Hednesford is the smallest of the main centres in Cannock Chase District. It is situated within the same urban area as Cannock and lies approximately 4km to the north-east. Hednesford Town Centre has a total of 117 retail and commercial leisure units, accommodating a total 26,209sq m (gross) floorspace. 10,674sq m of this floorspace is given over to convenience retailing, 4,070sq m to comparison shopping and 2,150sq m to retail service providers. The town centre accommodates 5,395sq m of commercial leisure floorspace and 830sq m of financial and business service floorspace.

**Other Centres in the District**

5.4.5 In addition to the town centres listed above, there are 7 smaller designated centres across the district which provide local shopping facilities and services to their local populations. They are summarised below:

- **Hawks Green District Centre -** located to the east of Cannock and Hednesford, it is anchored by a large Tesco foodstore and petrol filling station. The centre also provides several small retail and commercial service units including a restaurant and takeaway, charity shop and clothing retailer in addition to public house and community centre
- **Norton Canes Local Centre –**This centre is anchored by a Co-op foodstore and is located in the south east of the District. In addition to the Co-op, it supports several smaller retail service providers and takeaway units.
- **Heath Hayes Local Centre –** A linear centre located along Hednesford Road, it contains a Post Office, Costcutter convenience store, a pharmacy, and several other small retail/commercial occupiers
- **Chadsmoor Local Centre –** This centre is located between Cannock and Hednesford on Cannock Road. It provides a number of independent retailers and service providers in addition to a Post Office
- **Bridgtown Local Centre –** Providing mainly retail and leisure services, this small centre is located just off the A5 in the south of the District.
- **Fernwood Local Centre –** This suburban centre is located to the west of Rugeley and serves the surrounding housing estates. It provides a Spar convenience store and Post Office, a micro pub, and several other retail/commercial leisure units
- **Brereton Local Centre –** Located in the north east of the district, this small centre provides a Co-op foodstore, a public house and Chinese takeaway

**Main Out of Centre Retail & Leisure Locations**

5.4.6 In terms of out-of-centre retail and leisure provision, there are several retail parks and out-of-centre foodstores in Cannock Chase District. Further details for these are provided in Figure 5.3 below.

**Figure 5.3: Details of Main Out of Centre Retail Locations**

| | Distance from Nearest Town Centre | Key Occupiers |
|---|---|---|
| Orbital Retail Park | 2km | Homebase, SCS, Hughes, M&S Foodhall, Harveys, Carpetright, Pets at Home, Boots, Middleton Mobility, Dreams, 3D Kitchens, KFC, Sainsbury's with an instore Lloyds Pharmacy and Argos Concession |
| Wyrley Brook Retail Park | 2km | B&Q, Sports Direct, Home Bargains, JYSK, Naylors, Better Gym |
| Linkway Retail Park | 2.2km | Pound Stretcher, Currys, Dunelm, Jollyes, Tapi Carpets, Poundland, Iceland Food Warehouse, Halfords, McDonalds, Pizza Hut |
| Walsall Road, south of Cannock | 1.2km | The Range, Tile Choice, Cannock Kitchens, Euronics, Norman Davies TV & Video, Dulux Decorator Centre, Walsall Beds |

<u>West Midlands Designer Outlet</u>

5.4.7 Though still under construction at the time of writing, phase 1 of the West Midlands Designer Outlet operated by McArthurGlen is due to open at Mill Green in early 2021. Located approximately 1km walking distance from Cannock Town Centre, the development will provide over 130 commercial and leisure units when complete, accommodating 34,600sq m (gross) floorspace. It is anticipated that this development will be a major draw and will attract visitors from across Cannock Chase District and the wider West Midlands region.

## 5.5 Surrounding Main Large Centres

5.5.1 Given the location of Cannock Chase District just north of the large West Midlands Conurbation, its town centres do not operate in isolation. It is therefore important to understand the nature of the existing (and emerging) retail, leisure and town centre offering in the surrounding 'competing' centres, given that planned improvements could potentially materially impact upon shopping patterns, future performance and overall vitality and viability of the centres.

5.5.2 The surrounding large centres which the household survey results identified as having an influence on shopping patterns in Cannock are Stafford, Birmingham, Walsall, Lichfield and Tamworth.

**Stafford**

5.5.3 Stafford is the county town of Staffordshire and it lies approximately 15km to the north west of Rugeley, and 16km to the north of Cannock. The town is well connected to the wider region by road and rail being located just off the M6, and on the A34.

5.5.4 Stafford Town Centre is ranked as 'Sub-Regional' centre by VenueScore and hosts 2 shopping centres, the Guildhall Centre and Riverside, which provide a mixture of retail and leisure space. In addition to its town centre retail facilities, Stafford has several retail parks and other standalone shopping and leisure destinations. These include The Hough, and Queens Retail Parks to the south of the town centre which both accommodate several large format retail units.

**Birmingham**

5.5.5 Birmingham is Britain's 'Second City' and it is the social, cultural, financial and commercial centre of the West Midlands. Birmingham City Centre has excellent transport connections with three major railway stations and is within easy reach of the strategic motorway network, consequently the city has a major influence throughout the wider region. Located to the south of Cannock District, the city centre is approximately 32 kilometres from Cannock by road, and 45 kilometres from Rugeley.

5.5.6 Birmingham is ranked in the top 5 of Venuescore's UK Shopping Venue Rankings and is a major retail and leisure destination. The City Centre has two main shopping centres, The Bullring and Grand Central which together provide over 200 retail and leisure units, as well as several other smaller shopping centres such as The Mailbox which provide a more specialised offering. The City Centre has recently seen the opening of the largest Primark store in Europe and the redevelopment of Victoria Square.

5.5.7 Aside from its retail offer, Birmingham is a popular destination for leisure, arts and cultural offer. Major attractions include its Central Library, the Birmingham Museum and Art Gallery, The National Indoor Arena, The International Convention Centre (ICC) and Symphony Hall, and its Town Hall.

**Walsall**

5.5.8 Walsall forms part of the wider West Midlands Conurbation along with Birmingham, Wolverhampton and West Bromwich. The town centre is located approximately 15km driving distance from Cannock and is classed by VenueScore as a 'Regional Centre', ranking at 115 in the UK.

5.5.9 Walsall Council adopted a Town Centre Masterplan in July 2019 with the aim of delivering up to 19,000sq m of new leisure floorspace and 900 new homes in the town centre by 2040 in addition to enhancements to public space to drive a 20-30% increase in footfall.

**Lichfield and Tamworth**

5.5.10 Lichfield and Tamworth are located to the east of Cannock Chase District approximately 5km from each other. Lichfield is a compact city with a population of approximately 33,000 while Tamworth has a population of approximately 76,000. Both settlements provide an array of retail and leisure facilities, including the Three Spires shopping precinct and Garrick theatre in Lichfield, and Ventura Retail Park and the Snowdome indoor ski centre in Tamworth.

# 6.0 Cannock Town Centre

## 6.1 Introduction

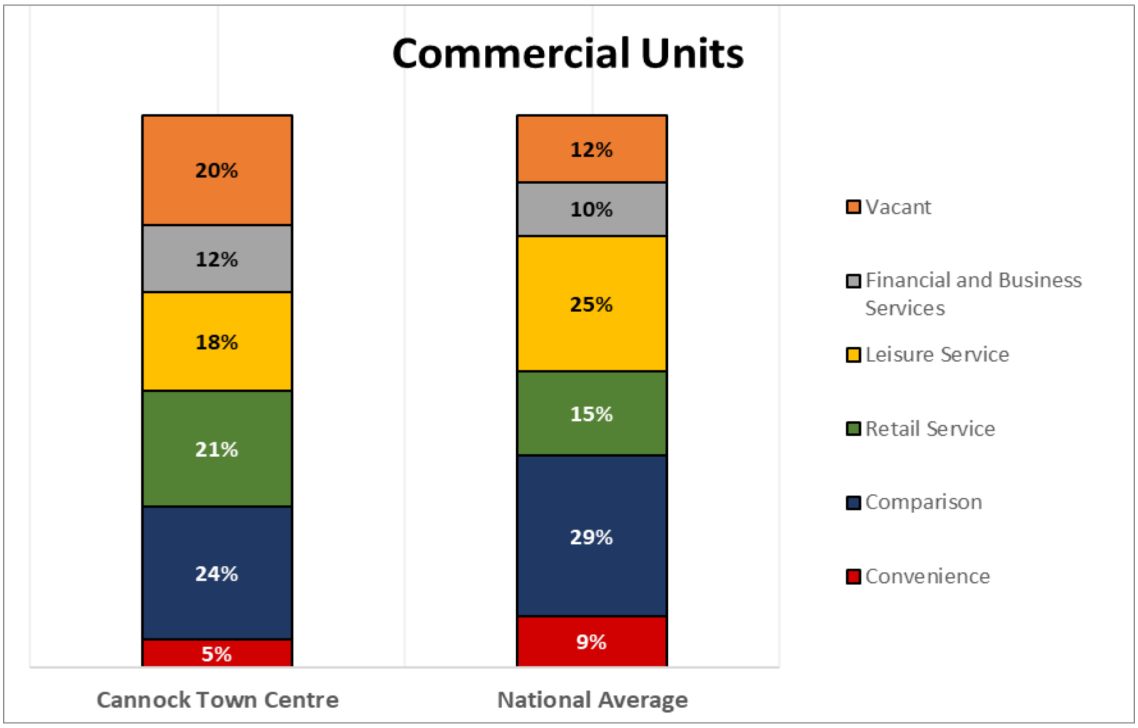
6.1.1 This section provides an overview of Cannock and summarises our findings and recommendations for future strategy to support the regeneration of the town centre. It draws on our empirical research to set out the composition of the town centre, retail market share analysis and a summary of our commercial leisure needs analysis. It then summarises our qualitative vitality and viability assessment, before setting out a summary of the quantitative need for additional retail floorspace. This then feeds into our recommendations for a strategy for the future development of the town centre.

## 6.2 Composition of the Town Centre

6.2.1 Cannock Town Centre is the principal shopping and leisure destination in the district. It provides a mixture of retail, service and leisure facilities and also accommodates other commercial uses, educational facilities, public services, places of worship and healthcare services.

6.2.2 Figures 6.1 and 6.2 provide a summary of the composition of Cannock Town Centre in terms of the proportion of units and floorspace occupied by each of the Experian Goad town centre use categories in comparison to the average for all centres across the UK.

**Figure 6.1 – Composition of Cannock Town Centre by Commercial Units**

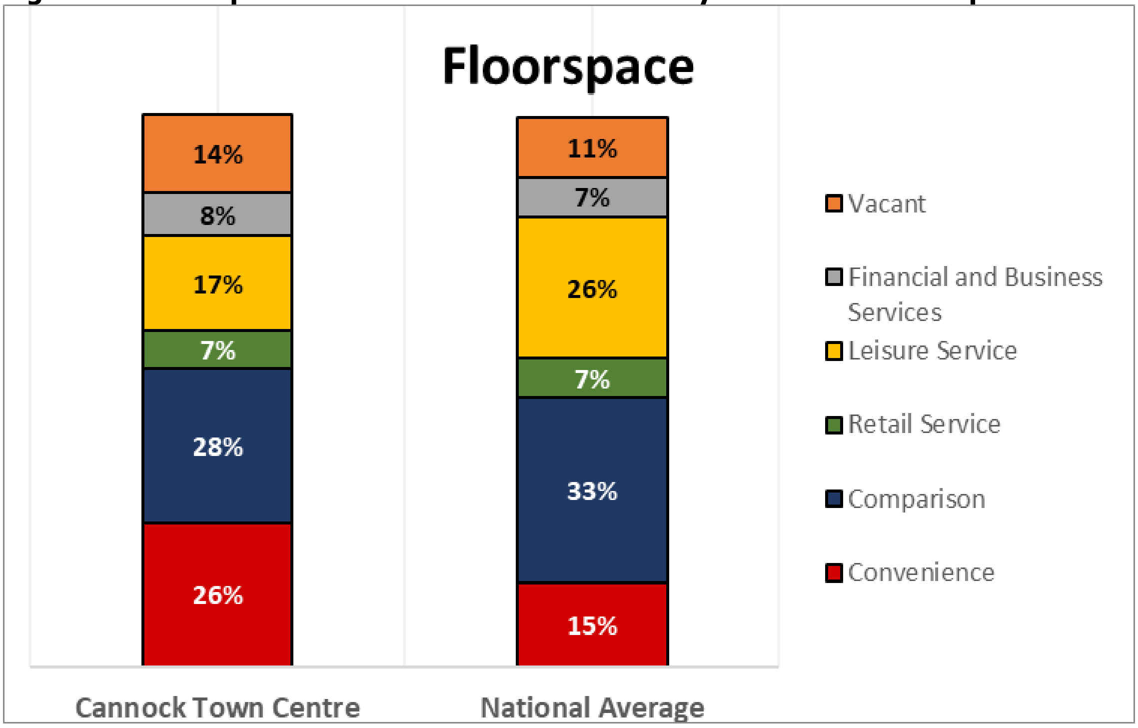



*Source: Experian Goad Surveys*
*Notes: Figures may not to 100% due to rounding*

6.2.3 The proportion of units occupied in Cannock Town Centre by convenience and comparison goods retailers and leisure service providers is lower than the national average whilst the proportion of retail service and financial & business service units is higher. There is also a high number of vacancies in the town centre (20% of units), compared to the national average of 12%.

6.2.4 In terms of floorspace, primarily due to the inclusion of the Asda and Morrison's stores within the Experian Goad survey, convenience goods retailers occupy a higher proportion of floorspace in Cannock Town Centre than the national average. Financial and business service and retail service provision is broadly in line with national averages. The proportion of floorspace accommodated by comparison goods retailers and commercial leisure services is below average while vacant floorspace is also above the UK.

**Figure 6.2 – Composition of Cannock Town Centre by Commercial Floorspace**




*Source: Experian Goad Surveys*
*Notes: Figures may not to 100% due to rounding*

## 6.3 Retail Market Share Patterns

6.3.1 Drawing on the findings of the household telephone survey, the convenience and comparison goods retail market share patterns in relation to Cannock are summarised below. A more detailed assessment of shopping patterns in Cannock and across Cannock Chase is set out at **Appendix D**.

6.3.2 Our analysis shows that foodstores in Cannock attracts 25% of main food shopping trips from across the household survey area, though most trips to foodstores in the town are made from areas in central and south east Cannock Chase. 64% of trips from residents in Cannock are retained by stores in the town, with the remainder made to other stores in the district including at Heath Hayes District Centre and the out of centre Orbital Retail Park.

6.3.3 In terms of top-up food shopping, stores in Cannock retain 53% of trips from those living in the town, 14% less than for main-food shopping. As with main-food shopping, stores within Cannock are shown to have an influence on the surrounding area, albeit to a lesser extent, drawing trips from adjacent survey zones. Across each of these zones, a lower proportion of top-up food shopping trips are made to Cannock compared to main food trips. Morrisons store at Mill Street and Asda at Avon Road are the most popular convenience food stores in Cannock for both main food and top-up food shopping.

6.3.4 Comparison goods retailers in Cannock have an influence on shopping patterns across the district and beyond, attracting trips from each of the survey zones. In total, 12% of all trips made from the survey area are made to facilities in Cannock, with 11% made to stores in the Town Centre. In terms of Cannock's immediate survey zones, the town centre attracts 25% trips from Zone 7 and 17% of trips from Zone 6. Cannock also attracts 8% of trips from Zone 8 (Norton canes), and 9% from Zone 9 (Cheslyn Hay & Landywood) which lies outside of the district boundary.

6.3.5 Other destinations in Cannock Chase are shown to attract 36% of comparison goods shopping trips from those in Cannock (Zone 7) including 17% to Linkway Retail Park, 9% to Orbital Retail Park and 5% to Wyrley Brook Retail Park. Destinations outside of the district are shown to only have a moderate influence on those in Cannock (12% of trips), with stores in Stafford attracting the greatest proportion of these (3%).

## 6.4 Commercial Leisure Assessment

6.4.1 A detailed assessment of commercial leisure provision, participation rates and capacity for new development is provided at **Appendix E.** A summary is provided below in respect of the facilities within Cannock.

<u>Restaurants, Cafes and Coffee Shops</u>

6.4.2 There are currently 7 cafes and 5 restaurants in the town centre. It is considered the existing restaurant/café/coffee shop provision is limited and under-represented. Whilst the household survey shows that the town centre attract restaurant/café/coffee shop trips from the majority of the survey zones and they retain a reasonable proportion of trips from those living nearby, given the size and role of the town centre we consider the trip rates should be higher. Accordingly, we recommend, alongside other leisure uses, that the future strategy for the town centre should plan for improved food and drink provision.

Indoor health & fitness facilities

6.4.3 Indoor health & fitness facilities in Cannock attract trips from each survey zone apart from Zone 3 (East Rugeley) and retain between 30–45% of trips from those living in Cannock (Zones 6 & 7). Given that there are several facilities nearby including the Chase Leisure Centre on Stafford Road, the Nuffield on East Cannock Road and facilities in Bridgtown, we do not consider that there is currently any material deficit in health and fitness provision.

6.4.4 Our analysis does not forecast any additional capacity for new gym facilities in Cannock by 2031 (the NPPF minimum plan period) but we do note that there is interest from an operator for a new facility in the town. Should any proposals come forward, we recommend that they are judged on their own merits and in accordance with relevant town centre planning policy at the time of any application submission.

Cinemas

6.4.5 Cannock Town Centre hosts the only cinema within the District, the Electric Palace Picture House on Lichfield Road. This is a small facility with two screens which together provide a total of 430 seats. Although located in the town centre, the cinema is separated from the main shopping area by a busy road and it does not have many complementary leisure uses such as restaurants and bars nearby. Analysis of the household survey suggests that the facility is not popular, capturing only 13% of the market share of cinema trips across the survey area and less than a third of trips from those within Cannock (Zones 6 & 7). This may be due to the small size of the facility and the absence of complementary food and drink uses.

6.4.6 Having regard to the size of the district and the current provision, we consider that a new small to medium sized facility could be supported within the District. Should the development ambitions in Cannock Town Centre be realised, a planned medium sized cinema at Church Street, together with complementary food and drink uses would enhance the leisure offer within town centre and help to retain some of the market share which is currently lost to Stafford and Walsall.

Tenpin Bowling

6.4.7 There are currently no bowling facilities in Cannock Chase with the nearest facilities located in Wolverhampton, Tamworth and Stafford. Responses to the household survey indicate that some residents would like to see additional facilities in their local area and given the absence of any facilities in the district, there could be potential for Cannock to accommodate a facility. At the current time there are no indicated requirements from any operators to open a new facility in the area but we recommend that if redevelopment of Cannock Town centre progresses, the Council investigate the potential for accommodating a small ten-pin bowling occupier alongside a cinema and food and drink uses.

Arts and Cultural Facilities

6.4.8 Our assessment has found the provision of arts and cultural facilities in Cannock to be somewhat lacking. Aside from the Prince of Wales Theatre, there are few other notable attractions in the town. Despite this, the demand/need for additional provision is likely to be limited due to existing and more comprehensive cultural facilities nearby in Wolverhampton, Birmingham, Walsall and Lichfield.

6.4.9 Though no specific new facilities should be planned for, if any future proposals for new cultural development do come forward, they are encouraged to locate in the town centre to help diversify the town centres offer, which in turn will increase footfall and reasons for people to visit.

6.4.10 In order to maintain and improve current participation rates and to help increase the number of visitors to the District in general, consideration should be given to ways of further promoting existing facilities.

## 6.5 Qualitative Vitality and Viability Assessment and SWOT Analysis

6.5.1 Our detailed qualitative health check assessment undertaken for Cannock can be found at **Appendix Gi**. It finds that the town centre is considered to currently display reasonably poor levels of vitality or viability.

6.5.2 Though the town centre provides a good convenience goods retail offer there is a limited leisure and food and drink offer, the centre has a high vacancy rate and provide poor level of environmental quality of the areas close to and within the main shopping area.

6.5.3 A general level of dissatisfaction with the retail offer and the environmental quality of the town centre was expressed by respondents to the business survey, and concerns were also raised about the lack of car parking following the closure of the multi-storey car park. Some positive comments were received however with one business owner commenting that they "*love working in Cannock, the people are great and the location is perfect, it just needs some improvement*". The potential of Cannock Town Centre was also reflected by comments received in our engagement with representatives from Cannock Town centre Partnership.

6.5.4 Overall, having regard to our health check assessment, feedback from key stakeholders and the business survey, we consider that the principal strengths, weaknesses, opportunities and threats to Cannock Town Centre are as follows:

**Strengths and opportunities**

- The town centre provides a good convenience goods offer with several large foodstores located at its edges.
- There is a reasonable retail service and financial & business service offer.

- An active and engaged Town Centre Partnership group are invested in the improvement of the town centre.
- There is an opportunity to build upon, and take advantage of, the wider catchment of the Mill Green Outlet Centre to draw more visitors into Cannock Town Centre.
- Recently published Town Centre Prospectus document provides a vision for the future redevelopment of several key town centre sites including the multi-storey car park at Church Street, the bus station, and Beecroft Car Park.
- The town centre benefits from a number of other town centre uses which help to attract visitors and create vibrancy including the centrally located Cannock College, Library and Hospital.
- The Prince of Wales Theatre is a key asset to the town centre.
- There are some attractive historic buildings in the centre such as St Luke's Church and The Whitehouse.

**Weaknesses and Threats**

- There is a high vacancy rate within key town centre locations including the Forum and Cannock Shopping Centre.
- Lack of a key anchor retailer within the core shopping area.
- Absence of commercial office space across the town centre.
- The town centre lacks a number of uses including a hotel, cinema and other key leisure uses.
- National multiple operators are limited and the current retail offer is geared towards a budget offer.
- Opening of Mill Green Outlet Centre may have an effect on the desirability of town centre space for operators.
- Pedestrian connectivity of town centre affected by busy road network and core shopping area cut off from the north by the ringway.
- Poor environmental quality close to the core shopping area, especially the forum and the central multi-storey car park which require investment.
- Competition from other out of centre retail parks along the A5 and from regional centres such as Birmingham, Walsall and Wolverhampton.
- Low footfall at edges of the town centre.
- The food and drink offer in the town centre is limited.

- A delay in the redevelopment of the Church Street site has the potential to impact further upon the vitality and viability of the town centre through long-term vacancies and further deterioration of existing disused buildings.

## 6.6 Quantitative Need for Additional Retail Floorspace

6.6.1 Our detailed analysis of the quantitative need for additional convenience goods and comparison goods floorspace for Cannock Chase can be found at **Appendix I.**

**Figure 6.3: Quantitative Need for Convenience Goods Floorspace in Cannock**

| Year | Surplus Expenditure £m | Floorspace Requirement (sq. m net) |
|---|---|---|
| 2021 | 1.2 | 100 |
| 2026 | -4.3 | - |
| 2031 | -4.5 | - |
| 2036 | -4.0 | - |
| 2040 | -3.5 | - |

*Source: Table 5, Appendix Iii*

6.6.2 As shown in Figure 6.3, our assessment identifies that at present (2021), there is a minimal amount of convenience floorspace capacity in Cannock (100sq m). However, by 2031 (the minimum timeframe identified by the NPPF when allocating sites), due to higher forecast turnover efficiency and lower forecast expenditure growth rates, need/capacity is assessed to reduce with no need/capacity for additional convenience floorspace in Cannock.

6.6.3 Turning to comparison goods capacity, Figure 6.4 sets out the quantitative need for additional floorspace in Cannock before any commitments are taken into account.

**Figure 6.4: Quantitative Need for Comparison Goods Floorspace in Cannock**

| Year | Surplus Expenditure £m | Floorspace Requirement (sq. m net) |
|---|---|---|
| 2021 | - | - |
| 2026 | 6.9 | 1,100 |
| 2031 | 3.0 | 400 |
| 2036 | 7.8 | 900 |
| 2040 | 15.9 | 1,700 |

*Source: Appendix Jiii*

6.6.4 The assessment identifies that before any commitments, Cannock has a limited amount of surplus expenditure in the periods to 2040. However, when the Designer Outlet West Midlands development at Mill Green (granted planning permission under application ref. CH/17/279), is taken into account, which is due to open in Q1 of 2021, this surplus will be absorbed and as a result there will be no resultant capacity for additional floorspace in the short, medium or longer term in Cannock.

## 6.7 Town Centre Strategy and Recommendations

6.7.1 The town centre strategy and vision for Cannock needs to be able to support the continued development and changes to the town centre environment if it is to successfully compete. As noted earlier in this study, the key purpose of any strategy moving forward should be to build upon the individuality of the town centre, provide a focus and hub for the local community and to aim to attract a mix of additional land uses beyond retail and leisure (including residential, educational, community and office uses) and extend the 'dwell time' and spend of visitors/residents visiting the town centre and in turn the vitality and viability of the centre.

6.7.2 We note that the Council are actively seeking to bring forward the regeneration of Cannock Town Centre. A development prospectus was published for the town centre in September 2020 'The Cannock Town Centre Development Prospectus'. The Development Prospectus sets out 9 key Council-owned 'Opportunity Sites' in and around the town centre with potential for redevelopment. These include:

- Site A, Church Street – Identified with potential to create a key leisure and cultural development to include a cinema, food and beverage and some retail. Further possibilities include the integration of residential apartments, a hotel or office space.
- Site B, Bus Station – Potential options for the site are identified for hotel and conferencing facilities or residential use.
- Site C, Beecroft Road Car Park – This site is just to the north of the main shopping area and adjacent to the Ringway. It is identified to provide a potential mixed-use development to include residential, retail or commercial office space.
- Site F, Backcrofts Car Park – Options for residential use but also potential for office space or ancillary retail and leisure development.
- Site I, Avon Road/Hallcourt Lane – This site is located between the Cinema on Walsall Road and the Asda on Avon Road. It is identified with potential for a mixed-use scheme of residential accommodation and small, specialist leisure facilities or a retail and food & beverage led scheme.

6.7.3 This study generally supports the approach as set out within the Development Prospectus Document though there are additional opportunities for the regeneration of Cannock Town Centre beyond the identified opportunity sites. We advise/provide comment as follows:

- Building on the work of the Development Prospectus, a more comprehensive strategic overview of Cannock Town Centre should be undertaken to identify further regeneration opportunities including works to improve the public realm, enhancements to the accessibility and connectivity of the town centre as well as examining opportunities to redevelop additional key sites outside of Council ownership.
- The identified redevelopment opportunity at Church Street should continue to be prioritised above other sites. This is a high-profile key gateway site into the town centre adjacent to an area with a high number of vacancies which is in need of significant improvement. Development of this site

with a mixture of leisure and commercial uses including a possible small cinema, bowling alley and food & beverage units with office or residential uses above would create a key destination which would draw visitors, extend 'dwell time' and spend, and would help to address current deficiencies.

- Strategies to maximise the opportunities for the town centre from the increased number of visitors coming into the area to visit the new Designer Outlet at Mill Green and its wider catchment should be explored. There is no key attraction or unique selling point in the town centre at present aside from the theatre, and additional cultural facilities within the town centre may help to draw visitors.
- In order for existing retailers and businesses in the town centre to fully benefit from the proposed town centre developments and from the opening of the designer outlet, integration and the creation of linkages will be important. The Ringway which runs around the north and east of main shopping area currently creates a significant barrier to pedestrian movement so investigation of the ways in which the relationship to areas beyond this can be strengthened is important. The strengthening of linkages to and from Cannock Railway station is also important, especially as the station lies between the town centre and Mill Green.
- Our assessments have identified that the town centre contains a high number of vacant units. Whilst redevelopment of key town centre sites will make Cannock more attractive to operators and investors which could reduce vacancy levels, repurposing vacant units should be considered to avoid long term vacancies and encourage diversity.
- Areas of the town centre provide a poor level of environmental quality. In addition to pursuing redevelopment options, existing spaces would benefit from investment and environmental enhancement.
- Whilst assessing hotel needs is not part of the remit of this study, it is noted that there is very little hotel accommodation within the town centre. We recommend that, subject to demand from hotel operators, additional centrally located hotel accommodation is considered. This would both increase footfall within the town centre, and also provide accommodation for those visiting the outlet centre.

6.7.4 We recommend that the findings of this study, particularly those in relation to the vitality and viability health check assessment are utilised by the Council in considering the further development of Cannock Town centre

# 7.0 Rugeley

## 7.1 Introduction

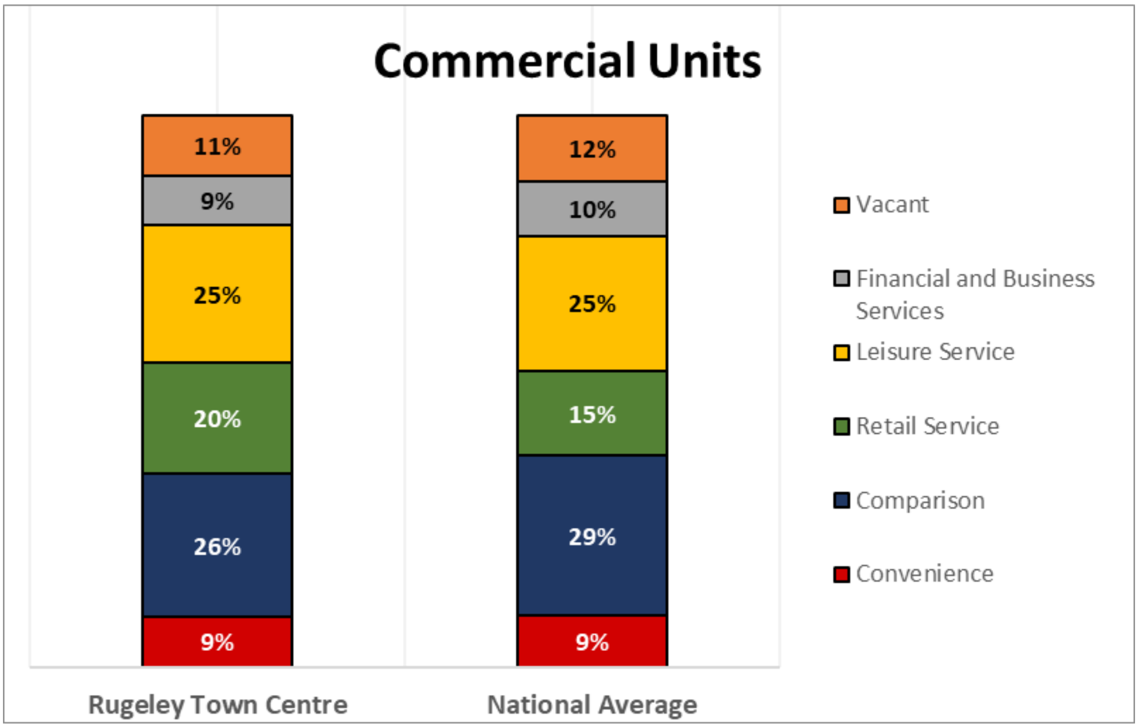
7.1.1 This section of the Study provides an overview of Rugeley and summarises our findings and recommendations for future strategy to support the town centre. Similar to Section 6, our empirical research is drawn upon to set out the composition of the town centre, provide retail market share analysis, and a summarise our commercial leisure needs analysis for the town. It then summarises our qualitative vitality and viability assessment, before setting out a summary of the quantitative need for additional retail floorspace. This then feeds into our recommendations for a strategy for the future development of the town centre.

## 7.2 Composition of the Town Centre

7.2.1 Rugeley is the second largest town in Cannock Chase District and is an important hub of retail and service uses. Located in the north of the district, it serves the population of the immediate built up area but also the rural hinterland beyond including those in the adjacent Lichfield and Stafford Districts.

7.2.2 Figures 7.1 and 7.2 provide a summary of the composition of the town centre in terms of the proportion of units and floorspace occupied by each of the Experian Goad town centre use categories, in comparison to the national average.

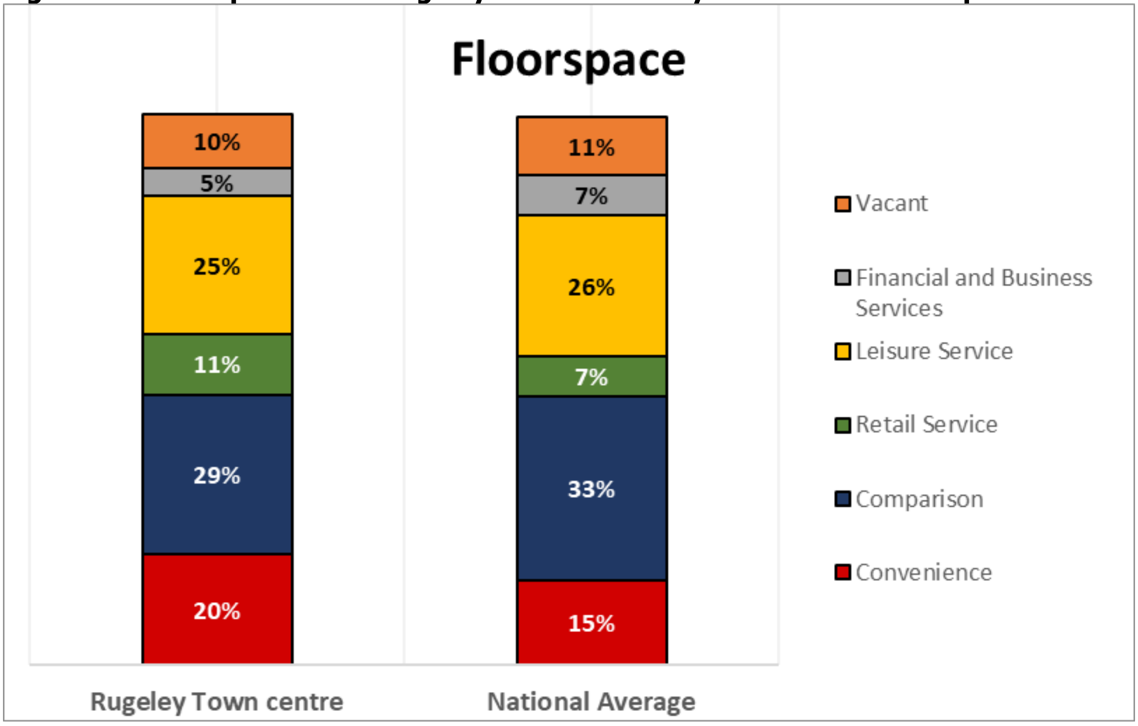
**Figure 7.1 – Composition of Rugeley Town Centre by Commercial Units**




*Source: Experian Goad Surveys*
*Notes: Figures may not to 100% due to rounding*

7.2.3 The proportion of units occupied for each use in Rugeley Town Centre is broadly in line with the national average with the exception of the comparison and retail service sector. The proportion of comparison goods units is lower than the UK average whilst the proportion of units in retail service use is higher. Given the more local role the town centre serves this is not considered to be unusual. The current vacancy rate in the town centre (11%) is slightly below the UK average (12%).

**Figure 7.2 – Composition of Rugeley Town Centre by Commercial Floorspace**




*Source: Experian Goad Surveys*
*Notes: Figures may not to 100% due to rounding*

7.2.4 The floorspace composition of Rugeley Town Centre differs more from the national average. Convenience goods retailers occupy a higher proportion of floorspace (5% more than average). This is primarily due to the Morrison's store and the inclusion of the Tesco store at Love Lane within the Experian Goad Survey area. Comparison goods retailers, leisure service providers and financial & business services each occupy a slightly lower proportion of floorspace than average whilst retail service provision is above the UK average in floorspace terms. Similar to proportion of vacant units in the town centre, the proportion of floorspace that is vacant is slightly lower than the UK average.

## 7.3 Retail Market Share Patterns

7.3.1 The convenience and comparison goods retail market share patterns are summarised below for Rugeley. These are drawn from responses to the household telephone survey. A more detailed assessment which analyses Cannock Chase District as a whole can be found at **Appendix D**.

Convenience Goods

7.3.2 For main food shopping trips, foodstores in Rugeley attract 10% of trips from across the survey area. Reflecting the town's location in the north of the district, all of these trips are made from the adjacent Zones 1-4 and stores in the town do not influence shopping patterns more widely.

7.3.3 The retention of main food shopping trips is the highest across the district, with approximately 90% of trips retained by foodstores in the town from those in Zones 2 (West Rugeley) and 3 (East Rugeley). The town attracts over 50% of trips from those in Zone 4 (Colton, Blithbury and Handsacre) which lies outside of the district, though this zone is largely rural in character with few foodstores.

7.3.4 The large Tesco store on Power Station Road is the most popular destination in Rugeley, followed by the Morrisons, Market Street and then Aldi, Market Street.

7.3.5 The top-up food shopping patterns in Rugeley are similar, with stores in the town attracting a high proportion of top-up food shopping trips from Zones 2, 3 and 4, though to less of an extent. Smaller shops outside of the town centre are shown to attract more top-up food shopping trips, including to the Co-op at Springfield Road in Etching Hill, and to the Spar on Green Lane.

Comparison Goods

7.3.6 Turning to comparison goods, facilities in Rugeley again predominantly draw comparison shopping trips from Zones 1-4, though a limited proportion are also made to the town from Zones 5 (Hednesford), 6 (Cannock North), 10 (Brownhills) and 11 (Burntwood and Chasetown).

7.3.7 Destinations outside of the district are shown to influence shopping trips made from Rugeley (Zones 2 & 3), with between 13 and 15% of comparison shopping trips from these zones made to stores in Stafford, 3-4% made to Lichfield, and 2% each to Tamworth.

## 7.4 Commercial Leisure Assessment

7.4.1 A summary is provided below of our assessment of the leisure service provision, participation rates and capacity for new leisure development in Rugeley. A more detailed assessment which examines Cannock Chase District as a whole is provided at **Appendix E.**

Restaurants, Cafes and Coffee Shops

7.4.2 There are presently 7 restaurants in Rugeley Town Centre which attract 4% of all trips to restaurants from across the survey areas. The retention rate from those living in the immediate vicinity of Rugeley (Zones 2 and 3) is 42 – 45% while 10% of trips made from the adjacent Zone 4 (Colton, Blithbury and Handsacre) are also made to these restaurants. At present we do not consider there to be a material deficiency in restaurant provision in the town, and the low overall trip rate is more as a result of Rugeley's location, than a lack of facilities.

7.4.3 Cafes and coffee shops in Rugeley retain a very high proportion of trips from those in West Rugeley (Zone 2) at 81% and 61% of trips from those in East Rugeley (Zone 3). This, coupled with our observation that the cafes in Rugeley were very busy during our visits, suggests there may be capacity for additional facilities in the town.

Indoor Health & Fitness Facilities

7.4.4 Analysis of the household survey results indicates that Rugeley retains a high proportion of trips to indoor health & fitness facilities from its associated survey zones. It also attracts a comparatively high proportion of trips from the adjacent Zone 4. There are several facilities within the town centre including Anytime Fitness on Brewery Street, Gymophobics on Market Street, and a martial arts and boxing club on Wellington Drive.

7.4.5 Overall, we consider that the indoor fitness market is reasonably well catered for in the town centre.

Other Leisure Uses

7.4.6 In addition to the uses noted above, Rugeley Town Centre accommodates a high number (19) of takeaway outlet, 9 public houses, bars and wine bars, 2 betting offices and an amusement arcade. The results of the household survey indicate that residents in the town travel mainly to nearby Stafford for trips to the Cinema and bowling alleys and outside of the district for arts and cultural activities.

7.4.7 Given the compact nature of the town centre, the existing participation rates, and the influence of other larger nearby centres, we do not consider there to be a need to plan for any other specific new leisure facilities. If any future proposals come forward from operators or developers however, we recommend that they are judged on their individual merits and in accordance with the relevant planning policy at the time of any application's submission.

## 7.5 Qualitative Vitality and Viability Assessment and SWOT Analysis

7.5.1 Our detailed health check analysis for Rugeley Town centre can be found at **Appendix Gii.** The assessment found that Rugeley displays reasonably good levels of vitality and viability.

7.5.2 On our visits to the town centre, for its size and role we found it to provide a reasonably good shopping environment with a historic core and good environmental quality. There is a good range of independent businesses which contribute to a distinct and individual offer, and we found the town centre was open and easy to navigate.

7.5.3 When compared with the findings of our previous health-check undertaken in 2015, there is evidence of increasing levels of vacancies in the town centre and Market Hall continues to struggle with occupancy rates. We found that the bus station also suffers from a peripheral location at the edge of the town centre with a lack of active frontages and natural surveillance which may impact on the perception of safety and security, especially after dark.

7.5.4 Stakeholders and respondents to the business survey complained that the image of the town from the outside was poor and that more should be done in terms of marketing and promotion of the town centre. Alongside lowering parking charges, greater promotion and marketing of the centre was one of the most common responses by business owners when asked to suggest potential improvements.

7.5.5 Overall, having regard to our health check assessment, feedback from visitors, stakeholders and responses from the business survey, we consider that the principal strengths, weaknesses, opportunities and threats to Rugeley Town centre are as follows:

**Strengths and opportunities**

- The town centre is attractive with a generally good environmental quality and historic core.
- The pedestrianised shopping area is open, legible and provides a good shopping environment.
- Vacancy rates are below the national average.
- There is a reasonably good provision of leisure facilities which cater to both the daytime and night-time economies.
- Good range of independent businesses which provide a distinct and individual retail/commercial offer.
- The adopted Area Action Plan identifies areas for improvement and ideas for the redevelopment of certain key sites.
- The town centre is easily accessible by foot from nearby residential areas.

**Weaknesses and Threats**

- Increasing, albeit still below UK average, levels of vacancies are evident.
- Connectivity with railway stations, canal towpath and Tesco in the north of the town centre could be improved.
- Proposals by Lidl and Aldi for nearby out of centre stores is likely to impact on convenience retailers in the town centre.
- Indoor market at Market Hall has high level of vacant units and is not a welcoming gateway to the town centre from the bus station.

- Bus station suffers from a peripheral position in the centre with a lack of active frontages/natural surveillance.
- Impacts of Covid-19 may lead to increasing vacancies including Argos and Peacocks which have recently announced programmes of store closures.
- Household survey respondents indicate that the shopping offer in the town centre could be improved.
- Proximity to the larger centres of Stafford and Lichfield and the soon to be opened Designer Outlet at Mill Green could limit interest from operators.

## 7.6 Quantitative Need for Additional Retail Floorspace

7.6.1 Our detailed analysis of the quantitative need for additional convenience and comparison goods floorspace across the district is provided at **Appendix I**.

**Figure 7.3: Quantitative Need for Convenience Goods Floorspace in Rugeley**

| Year | Surplus Expenditure £m | Floorspace Requirement (sq. m net) |
|---|---|---|
| 2021 | 2.7 | 200 |
| 2026 | -1.9 | - |
| 2031 | -2.0 | - |
| 2036 | -1.6 | - |
| 2040 | -1.2 | - |

*Source: Table 5, Appendix Iii*

7.6.2 Our assessment identifies that there is presently (at 2021) a very limited amount of convenience floorspace capacity in Rugeley (200sq m net). By 2031 (the minimum timeframe identified by the NPPF when allocating sites), capacity is assessed to reduce to nil due to higher forecast turnover efficiency and lower forecast expenditure growth rates.

7.6.3 Looking at potential for additional comparison goods floorspace, Figure 7.4 sets out our assessment for Rugeley.

**Figure 7.4: Quantitative Need for Comparison Goods Floorspace in Rugeley**

| Year | Surplus Expenditure £m | Floorspace Requirement (sq. m net) |
|---|---|---|
| 2021 | - | - |
| 2026 | -0.3 | - |
| 2031 | -1.4 | - |
| 2036 | -0.7 | - |
| 2040 | 0.8 | <100 |

*Source: Appendix Jiii*

7.6.4 It is assessed that there is no capacity in the short to medium term, and only a very minimal amount (<100sq m) identified at 2040. It is likely that once the Outlet Centre at Mill Green opens, this capacity will be fully absorbed and there will be no additional capacity for additional floorspace in the short, medium or long term in Rugeley.

## 7.7 Town Centre Strategy and Recommendations

7.7.1 Any strategy for Rugeley Town Centre needs to reflect the changes to the town centre environment, and as with the other centres in the district, it should build upon Rugeley's strengths and individuality and aim to attract a mix of additional land uses to the town centre.

7.7.2 Our analysis finds Rugeley Town Centre to be performing reasonably well and our recommendations for a future strategy and vision for the town therefore seek to address the identified weaknesses and threats while taking account of the positive aspects of the centre. Our recommendations include:

- Prioritisation of the redevelopment or refurbishment of Market Hall and the bus station. The bus station and under-occupied Market Hall do not provide a positive gateway into the town centre at present and negatively impact on the image of the town centre.
- Seek to promote the indoor market/s to drive footfall and operator interest.
- Review opportunities to bring in additional commercial or residential uses to the town centre (potential within the redevelopment of Market Hall).
- Improve connectivity from the town centre to the railway stations.
- Develop a marking strategy to improve the perception of the town centre. This strategy should provide an assessment to understand the potential options for promoting existing facilities and marketing the town to other commercial operators. This could be implemented alongside a review of opportunities to further embrace the 'digital high street' by expanding existing digital facilities in the town centre
- Look at possibilities to further embrace the historic nature of the town centre

# 8.0 Hednesford Town Centre

## 8.1 Introduction

8.1.1 In this section of the Study we provide an overview of Hednesford. Again, similar to the previous two sections we summarise our findings and recommendations for a future strategy to support the town centre.

## 8.2 Composition of the Town Centre

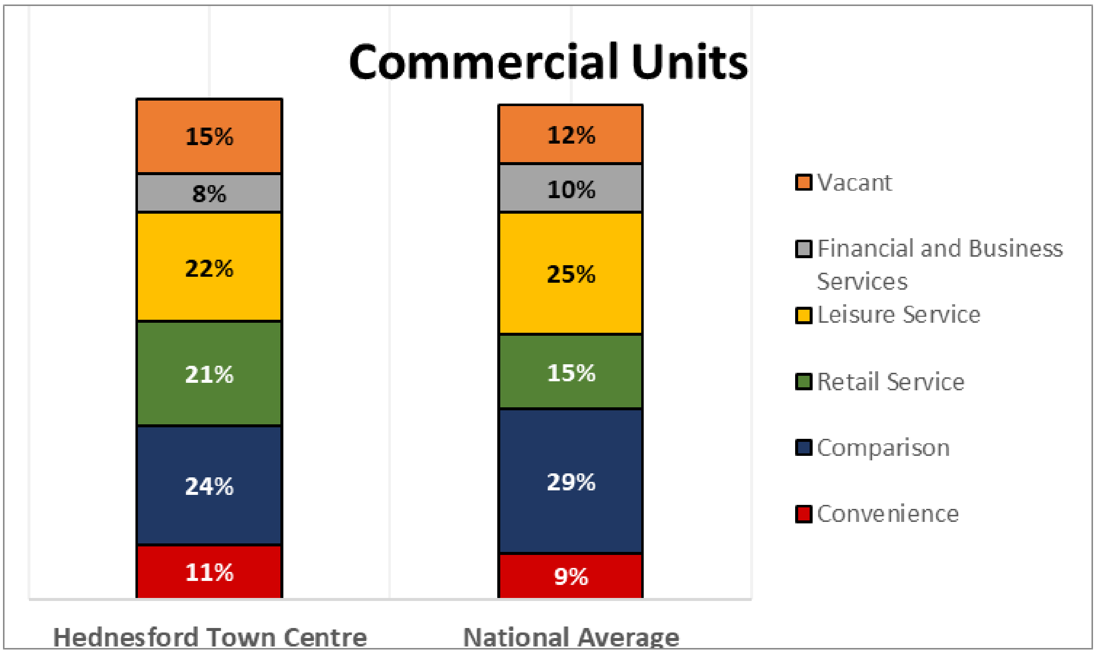
8.2.1 Hednesford is the smallest of the three town centres within Cannock Chase District serving the role as an important retail and service centre for residents to the north east of Cannock. The town centre is concentrated along Market Street which is lined with retail and service units with some residential uses above at first floor level. The town centre boundary also incorporates The Chase Gateway and Victoria Shopping Park developments off Rugeley Road and Victoria Street respectively. Chase Gateway accommodates an Aldi foodstore and 5 commercial and leisure units including a bingo club, while Victoria Shopping Park accommodates a large Tesco foodstore, several comparison goods units, and a large Puregym unit with a function room above.

8.2.2 Figure 8.1 and 8.2 provide a summary of the composition of the town centre, showing the proportion of units and floorspace occupied by each Experian Goad town centre use category alongside the UK average.

8.2.3 The proportion of units occupied in Hednesford Town Centre by convenience and retail service providers is higher than UK average, while the proportion of comparison goods retailers, leisure service providers and financial & business service providers is below average. The lower proportion of comparison goods in the centre reflects its more local service role.

8.2.4 Figure 8.1 also shows that the vacancy rate is also higher than the national average, at 15% of units, compared to the national average of 12%.

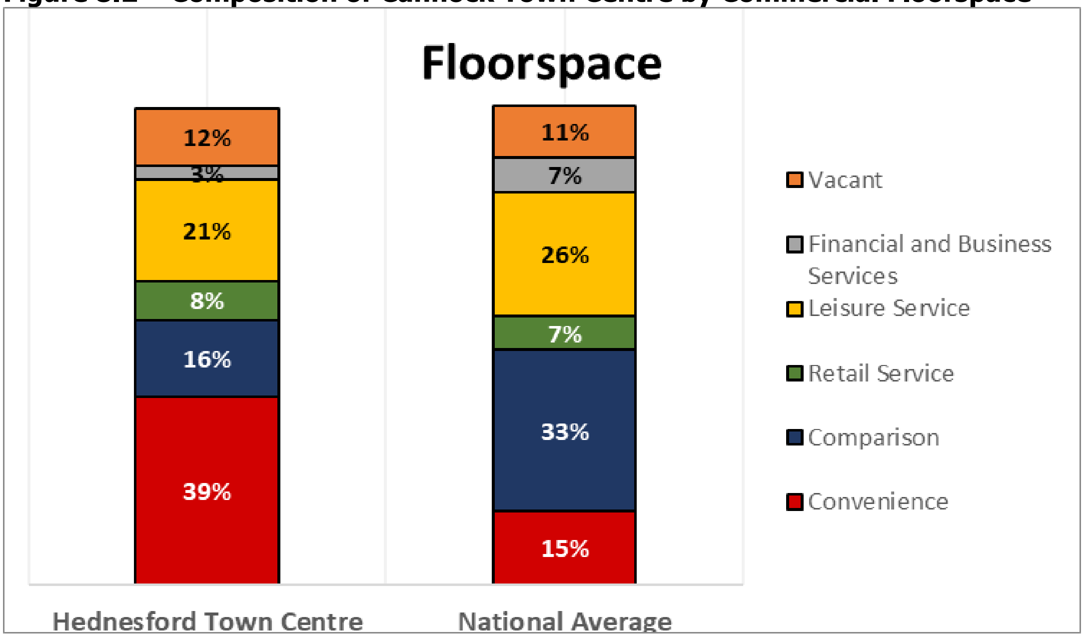
**Figure 8.1 – Composition of Hednesford Town Centre by Commercial Units**




*Source: Experian Goad Surveys*
*Notes: Figures may not to 100% due to rounding*

8.2.5 In terms of floorspace, convenience retailers occupy a far greater proportion of floorspace in the town centre than average, at 39%. This is due to the large Tesco and Aldi stores located at Victoria Shopping Park and Chase Gateway respectively being included within the Experian Goad survey area. The large proportion of floorspace accommodated by convenience goods means that the proportion given to each of the other categories is lower than average, apart from vacant floorspace, which is slightly higher than the national average (of 11%).

**Figure 8.2 – Composition of Cannock Town Centre by Commercial Floorspace**




*Source: Experian Goad Surveys*
*Notes: Figures may not to 100% due to rounding*

## 8.3 Retail Market Share Patterns.

8.3.1 A summary of the convenience and comparison goods retail market share patterns in relation to Hednesford are set out below. A more detailed assessment of shopping patterns in Cannock and across Cannock Chase as a whole is provided at **Appendix D.**

8.3.2 Just under half of main food shopping trips from residents closest to Hednesford (Zone 5) are retained within the town with all of these trips made to either Tesco or Aldi in the town centre. These stores also attract just under a third of trips from Zone 6 (North Cannock) and a small proportion of trips from each of the other survey zones apart from Zone 1 (South East Stafford).

8.3.3 For top-up food shopping, a smaller proportion of trips from across the survey zone are shown to be made to facilities in Hednesford compared to main food shopping trips, though stores in the town still attract trips from across the district, except for Zone 8 (Norton Canes).

8.3.4 The limited comparison goods offer in Hednesford means that the town centre retains only 8% of market share from residents within its zone (Zone 5). The town's central location in the district does mean that a small proportion of trips are made to Hednesford Town Centre from each of the other survey zones but the vast majority are made elsewhere.

## 8.4 Commercial Leisure Assessment

8.4.1 A detailed assessment of commercial leisure provision, participation rates and capacity for new development is provided at **Appendix E.** A summary of our assessment is provided below in respect of the facilities within Hednesford.

8.4.2 The town centre retains only 11% of the restaurant market share from residents in the town (survey Zone 5) and facilities in the town attract a small proportion of trips from Zones 2 (West Rugeley), 4 (Colton, Blithbury and Handsacre), 6 (North Cannock), 7 (Cannock) and 9 (Cheslyn Hay & Landywood). Given the small size of the town centre and its location close to Cannock, the retention rate is generally considered to be reasonable. Overall, we do not consider that there is any particular deficit in provision within the town centre.

8.4.3 Café facilities in the town retain 41% of trips made from those in the town (Zone 5) and attract some trips from the adjacent Zone 6 (Cannock north) and from Zone 8 (Norton Canes). A small proportion of trips are also made from Zone 1 (South East Stafford), Zone 3 (East Rugeley) 7 (Cannock) and Zone 10 (Brownhills). Given the local focus of the town centre, and its proximity to Cannock, we consider the retention rates are reasonable and there is no notable deficiency in café/coffee shop provision.

8.4.4 In terms of indoor health & fitness facilities, Hednesford retains 31% of the market share from its Zone (Zone 5) and attracts a fifth of trips from Zone 8 (Norton Canes) and just over 10% of trips from Zone 6 (Cannock North). Facilities in the town also attract a small number of trips from Zones 2, 3, 7 and 11).

The Pure Gym on Victoria Shopping Park provides a modern gym facility for the town centre which we consider meets the needs of Hednesford residents.

8.4.5 In addition to the uses noted above, Hednesford Town Centre accommodates 5 pubs and bars, 2 fast food takeaways, 2 betting offices, a bingo hall and the Aquarius Ballroom, a function suite and ballroom which also hosts conferences and events.

8.4.6 Given the relatively small size of Hednesford compared to the nearby Cannock Town Centre, we do not consider there to be a need to plan for any specific new leisure facilities in the town. Should any future proposals come forward from operators or developers however, we recommend that they are judged on their individual merits and in accordance with the relevant planning policy at the time of any application's submission.

## 8.5 Qualitative Vitality and Viability Assessment and SWOT Analysis

8.5.1 Our detailed health check analysis for Hednesford Town Centre can be found at **Appendix Giii** and it considers Hednesford to display reasonable levels of vitality and viability.

8.5.2 We found Market Street to provide an attractive shopping environment with numerous buildings of merit and historical interest. Overall the town centre in general is considered to have a good level of environmental quality. For the size of the centre, there is also a good leisure offer with a range of attractions including a ballroom and function room and a bingo hall which help to attract visitors to the town centre outside of core business hours.

8.5.3 There are some areas of the town centre which could benefit from improvement, such as the vacant former Co-op unit at the top of Market Street which is in need of investment or redevelopment as it detracts from this area of the town centre. We note Hednesford is now without any local banking facilities following the closure of the Lloyds Bank branch, and there is also a higher than average vacancy rate which is especially apparent in the Lightworks indoor shopping centre were footfall was observed to be low.

8.5.4 Feedback from respondents to the business survey indicated the loss of local banking facilities in the town centre had impacted on footfall and the most common answer when asked about suggested improvement measures was to increase the choice and range of shops in the town centre.

8.5.5 Overall, having regard to our health check assessment, feedback from visitors and responses to the business survey, we consider that the principal strengths, weaknesses, opportunities and threats to the town centre are as follows:

**Strengths and opportunities**

- The town centre has benefitted from investment over the past decade and the developments at Victoria Shopping Park and Chase Gateway are popular and attract shoppers.
- Market Street has an attractive built form with numerous buildings of merit and historical interest and the town centre has a good environmental quality.
- The large Tesco store at Victoria Shopping Park and the Aldi at Chase Gateway mean the town has a good convenience goods offer.
- For the size of the town centre, there is a good leisure offer with a range of attractions including the ballroom/function room and a bingo hall which can attract visitors after normal business hours
- The town centre provides a good range of retail services.
- The layout of the town centre is legible and easily accessed by foot given its compact size.
- Independent operators contribute to the character and individual offer of the town centre.
- Vacant Co-op site presents an opportunity for redevelopment to residential or other commercial use to complement the retail and service offer within the town centre.

**Weaknesses and Threats**

- The town centre offer has a small catchment area and is geared towards the local market which may limit the attractiveness to new business.
- The former Co-op unit is in need of investment or redevelopment as it detracts from the local environment at present.
- Proximity to Cannock is likely to be a barrier to operators locating to the town centre.
- Vacancies and low footfall within the indoor shopping centre.
- Lack of any local banking facilities following the closure of Lloyds Bank.

## 8.6 Quantitative Need for Additional Retail Floorspace

8.6.1 Our detailed analysis of the quantitative need for additional convenience and comparison goods floorspace across the district and for each town is provided at **Appendix I.**

8.6.2 Our assessment estimates that there is capacity for additional convenience floorspace in Hednesford at present, primarily due to the assessed overtrading of existing stores in the town. This capacity will reduce slightly to 1,000sqm at 2026 and is estimated to remain at this level until 2040 if not met beforehand.

**Figure 8.3: Quantitative Need for Convenience Goods Floorspace in Hednesford**

| Year | Surplus Expenditure £m | Floorspace Requirement (sq. m net) |
|---|---|---|
| 2021 | 14.8 | 1,300 |
| 2026 | 11.1 | 1,000 |
| 2031 | 11.0 | 1,000 |
| 2036 | 11.3 | 1,000 |
| 2040 | 11.7 | 1,000 |

*Source: Table 5, Appendix Iii*

8.6.3 In terms of comparison goods floorspace our assessment identifies that there is no capacity in the short to medium term, and only a very minimal amount (<100sq m) identified at 2040. It is considered that once the Outlet Centre at Mill Green opens, this capacity will be fully absorbed and there will be no additional capacity for additional floorspace in the short, medium or long term in Hednesford.

**Figure 8.4: Quantitative Need for Comparison Goods Floorspace in Hednesford**

| Year | Surplus Expenditure £m | Floorspace Requirement (sq. m net) |
|---|---|---|
| 2021 | - | - |
| 2026 | -0.1 | - |
| 2031 | -0.5 | - |
| 2036 | -0.3 | - |
| 2040 | 0.3 | <100 |

*Source: Appendix Jiii*

## 8.7 Town Centre Strategy and Recommendations

8.7.1 Our analysis finds Hednesford Town Centre to be showing reasonable levels vitality and viability. Our recommendations for a future strategy and vision for the town therefore seek to address the identified weaknesses and threats while taking account of the positive aspects of the centre. Our recommendations include:

- Exploring options to seek alternative commercial uses within the Lightworks Indoor Shopping Centre where there is a present concentration of vacancies and low footfall. Incubator space for start-up businesses or encouraging community uses in empty units would help to increase activity within the centre and would bring additional visitors to the town.
- Seek opportunities to redevelop the former Co-op unit to residential or commercial uses which would complement the retail offer within the town centre.
- Investigate ways to attract further investment into the town centre by supporting the continued growth of independent retailers and businesses.
- Promote and support the newly formed Market to ensure its viability/success.

- Given that the highest levels of footfall were recorded at Victoria Shopping Park and Chase Gateway review linkages with Market Street to establish whether there is further opportunities to increase footfall and linked trips to the other business along Market Street.

# 9.0 Policy & Recommendations

## 9.1 Introduction

9.1.1 The previous sections of the study set out role and function of each town centre, a summary of their deficiencies and needs for retail and other main town centre uses, and recommendations on potential town centre strategies. This final section of the study provides our policy recommendations and advice in relation to:

- The hierarchy of centres;
- a local impact assessment threshold; and
- the extent of town centre boundaries and primary shopping areas'

## 9.2 Recommended Hierarchy of Centres

9.2.1 In drawing up local plans, Paragraph 85 of the NPPF requires the LPA to define a network and hierarchy of centres.

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

> *"Town centres will usually be the second level of centres after city centres and, in many cases, they will be the principal centre or centres in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability. In London the 'major' and many of the 'district' centres identified in the Mayor's Spatial Development Strategy typically perform the role of town centres.*
>
> *District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.*
>
> *Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a local centre.*

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

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

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

9.2.4 Adopted Local Plan Policy CP11 sets out the hierarchy of retail centres within Cannock Chase. It identifies Cannock as a 'Strategic Sub-Regional Centre' and Rugeley and Hednesford as 'Town Centres'. Underneath this, Hawks Green is identified as a 'District Centre' with 6 local centres: Norton Canes, Heath Hayes, Chadsmoor, Bridgtown, Fernwood Drive and Brereton.

9.2.5 This Study identifies that Cannock Town Centre continues to perform as an important town centre. The town centre provides a sub-regional role serving the District, despite a weakening in its comparison goods market share over the past five years. It is important for Cannock Town Centre to remain a strong sub-regional town centre and for policy to continue to ensure that further potential out-of-centre retail and/or commercial leisure development does not undermine its role in the hierarchy. We recommend that Cannock should continue to be identified as a 'Strategic Sub-Regional Centre' in the emerging local plan.

9.2.6 In terms of the Rugeley and Hednesford Town Centres, Sections 7 and 8, and **Appendix G** of the Study examines their health and composition. The Study finds that both of these centres continue to provide town centre retail and service uses and function as town centres. Accordingly, having regard to our assessment we recommend both Rugeley and Hednesford remain identified as 'Town Centres' in the centre hierarchy of the emerging local plan.

9.2.7 The Council's Brief for this Study did not include an assessment of lower order district and local centres so unfortunately we are unable to advise whether they continue to function and provide a role in line with their previous designations.

## 9.3 Recommended Local Impact Threshold

9.3.1 In accordance with national planning policy, it is appropriate to identify locally set thresholds for the scale of edge-of-centre and out-of-centre development which should be subject to the assessment of the impact criteria set out by paragraph 89 of the NPPF. The NPPF sets a default impact threshold of 2,500sq m gross. The NPPG explains that gross retail floorspace is defined as *"the total built floor area measured externally which is occupied exclusively by a retailer or retailers, excluding open areas uses for the storage, display or sale of goods"* (paragraph 16).

9.3.2 When setting a setting a locally appropriate threshold, the NPPG considers the following aspects important:

- scale of proposals relative to town centres;
- the existing viability and vitality of town centres;
- cumulative effects of recent developments;
- whether local town centres are vulnerable;
- likely effects of development on any town centre strategy; and
- impact on any other planned investment.

9.3.3 A tiered impact threshold policy was recommended within the previous study in 2015 which would ensure that development proposals in Cannock and Rugeley providing greater than 1,000sq m gross floorspace for retail, leisure or office uses in an edge or out of centre location should be the subject of an impact assessment. It was recommended that a threshold of 500sq m was applied to development around Hednesford, and at District, Local and Neighbourhood Centres it was applied at proposals larger than 200sq m gross.

9.3.4 Following the assessments undertaken within this Study and having regard to, *inter alia*: the current health, performance, unit and floorspace composition of each of the town centres; increasing competition from the internet; and availability of units in the main shopping areas capable of meeting potential national multiple occupiers in each of the centres, we consider that a more cautious lower threshold of 500sq m gross should be adopted for Cannock and Rugeley Town Centre. The floorspace threshold for Hednesford of 500sq m gross should remain unchanged, as should the 200sq m threshold at District, Local and Neighbourhood Centres.

9.3.5 For Cannock Town Centre in particular a lower threshold is recommended because its vitality and viability is reasonably poor, it is in need of investment which is likely to be challenging to deliver given the current economic climate, and the soon to open Mill Green Designer Outlet may have a negative impact on it.

9.3.6 The thresholds should not only apply to new floorspace, but also to changes of use and variations of conditions to remove or amend restrictions on how units operate in practice. In relation to the proposals to amend restrictions to existing retail units, the floorspace threshold should apply to the relevant planning/retail unit as a whole.

9.3.7 It is important to stress that whilst the locally set threshold would require the submission of an impact assessment for all edge-of-centre and out-of-centre developments exceeding the thresholds, national guidance states that the impact test should be undertaken in a proportionate and locally appropriate way, commensurate to the scale of development proposed. The level of detail would typically be agreed with planning officers during the pre-application process in order to avoid overly onerous requirements that may otherwise restrict and delay development opportunities from coming forward.

## 9.4 Recommendations on Town Centre Boundaries and Primary Shopping Areas

9.4.1 The NPPF (paragraph 85) identifies that LPA's planning policies should define the extent of town centres and primary shopping areas and set out the range of uses permitted in such locations as part of a positive strategy for the future of each centre.

9.4.2 The Local Plan Policies Map defines the town centre boundaries the 3 town centres and 'primary retail areas' for Cannock and Rugeley. As part of this Study, and in line with the brief, WYG has reviewed these boundaries and makes recommendations. Our recommendations have regard to our vitality and viability health check, detailed analysis of each town centre, and town centre strategy recommendations identified above. It should be noted that in order to encourage a more positive and flexible approach to planning for the future of town centres the NPPF deleted its predecessors' requirement for LPA's to identify primary and secondary frontages.

9.4.3 In making our recommendations on the primary shopping area and town centre boundaries we have had regard to the definitions of each set out in Annex 2 of the NPPF:

> *"**Town Centre** – Area defined on the local authority's policies map, including the primary shopping area and areas predominantly occupied by main town centre sues within or adjacent to the primary shopping area…*
>
> ***Primary shopping area** – Defined area where retail development is concentrated."*

9.4.4 We set out our recommended town centre boundaries and primary shopping areas for each of the 3 town centres at **Appendix J**. In accordance with the NPPF that town centre boundaries should be kept under review, where necessary, so that future anticipated needs can be accommodated.