1.1 Introduction

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

1.2 National Planning Policy

1.2.1 National Planning Policy for England is contained within the National Planning Policy Framework (NPPF) (June 2019)[1]. It sets out the Government's requirements for the planning system only to the extent that it is relevant, proportionate and necessary to do so.

1.2.2 The main theme of the NPPF is that there should be 'a presumption in favour of sustainable development' which is set out under three overarching objectives, economic, social and environmental. *The economic objective seeks to help build a strong, responsive and competitive economy, by ensuring that sufficient land of the right types is available in the right places at the right time to support growth* (Paragraph 8a).

1.2.3 In terms of plan-making, it is stated that the planning system should be genuinely plan led and local planning authorities should positively seek opportunities to meet the development needs of their area, with an emphasis on Local Plans having sufficient flexibility to adapt to rapid change.

1.2.4 In terms of economic development, Section 6 of the NPPF identifies that planning policies should create the conditions in which businesses can invest, expand and adapt. Significant weight should be placed on the need to support economic growth and productivity. Planning policies and decisions should recognise and address specific locational requirements of different sectors.

1.2.5 The NPPF stresses planning policies should; set out a clear economic vision and strategy which positively and proactively encourages sustainable economic growth, be flexible enough to accommodate needs not anticipated in the plan and enable a rapid response to changes in economic circumstances.

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

1.2.6 The NPPF recognises the need to ensure the vitality and viability of towns and cities and support the role that they play at the heart of local communities by taking a positive approach to their growth, management and adaption. Paragraph 85 of the NPPF indicates that planning policies should:

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

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

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

1.2.9 Paragraph 90 indicates that where an application fails to satisfy the sequential test or is likely to have a significant adverse impact on the vitality and viability of a town centre or on existing, planned, committed investment in a centre, it should be refused.

1.2.10 The NPPF also recognises that retail and leisure activity should still, where possible, be focused in existing town centres. Retail and leisure proposals which cannot be accommodated in or adjacent to the town centre will have to satisfy a dual impact test and the sequential test.

1.3 Ensuring the Vitality of Town Centres Planning Practice Guidance

1.3.1 National Planning Practice Guidance[2] relating to town centres and retail was updated in July 2019. The objectives of the Practice Guidance remain comparable with those of its predecessor, with there being a stated requirement for local planning authorities to plan positively and support town centres to generate local employment, promote beneficial competition within and between town centres, and create attractive and diverse places were people want to live, visit and work.

1.3.2 The Practice Guidance requires local planning authorities to fully assess and plan to meet needs for main town centre uses through the adoption of a 'town centre first' approach. Paragraph 002 confirms that the key way to set out a vision and strategy for town centres is through the development plan and, if needed through supplementary planning documents, it also confirms that, where appropriate, local planning authorities can define primary and secondary retail frontages where they support the vitality and viability of a centre.

1.3.3 Paragraph 003 recognises that creative leadership from Local Authorities and other stakeholders is key when developing a town centre vision. Engaging with a range of stakeholders is encouraged and, whilst recognising that local needs and context differs, these stakeholders could include:

- Local authorities and or combined authorities;
- Local Enterprise Partnerships (LEPs);

[2] https://www.gov.uk/guidance/ensuring-the-vitality-of-town-centres

- Members of Business Improvement Districts (BIDs);
- Neighbourhood planning groups;
- Local residents and community groups;
- Landowners;
- Private sector businesses and / or representative groups such as chambers of commerce; and
- Town centre managers.

1.3.4 Paragraph 004 specifies that any strategy should be based on evidence of the current state of town centres and opportunities to meet development needs and support town centres' vitality and viability. Such strategies should seek to address the following matters:

- the appropriate and realistic role, function and hierarchy of town centres in the area over the plan period. This assessment may need to focus on a limited period given the uncertainty in forecasting long-term trends;
- consideration of the vision for the future of each town centre and the most appropriate mix of uses to enhance overall vitality and viability;
- the ability of the town centre to assess whether it can accommodate the scale of assessed need for main town centre uses and any associated need for expansion, consolidation, restructuring or to enable new development or redevelopment of under-utilised space.
- how existing land can be used more effectively;
- opportunities for improvements to the accessibility and wider quality of town centre locations, including improvements to the transport links and public realm enhancements
- what complementary strategies are necessary or appropriate to enhance the town centre to deliver the vision in the future;
- the role different stakeholders can play in delivering the vision; and
- appropriate policies to address environmental issues facing town centres, including opportunities to conserve and enhance the historic environment.

1.3.5 Paragraph 005 recognises that it may not always be possible to accommodate all forecasted needs for main town centre uses within a town centre due to physical or other constraints which would make it inappropriate to do so. In those circumstances, local planning authorities should plan positively to identify the most appropriate alternative strategy for meeting these needs, having regards to the sequential and impact tests.

1.3.6 Paragraph 006 of the Practice Guidance identifies a series of key indicators which are which should be considered when assessing the health of a centre over time. This includes:

- The diversity of uses;
- Proportions of vacant street level property;
- Commercial yields on non-domestic property;
- Customers experience and behaviour;
- Retailer representations and any intentions to change representations;
- Commercial rents;
- Pedestrian flows;
- Accessibility; - this includes transport accessibility and accessibility for people with impairments or health conditions, as well as older people with mobility requirements;
- Perceptions of safety and occurrence of crime;
- State of town centre environmental quality;
- Balance between independent and multiple stores;
- The extent to which there is evidence of barriers to new businesses opening and existing businesses expanding; and
- The opening hours of units and the availability and extent to which there is an evening and night time economy offer.

1.3.7 Paragraph 010 reaffirms the town centre first policy in the form of the sequential test, which requires local planning authorities to undertake an assessment of potential sites' availability, suitability and viability when preparing their Local Plan. Such an assessment should also consider the scale of future needs and the type of land needed to accommodate main town centre uses.

1.4 Changes to the Use Classes Order

1.4.1 In July 2020, changes were announced by the Government to the Use Classes Order which came into effect from September 2020. The Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020 removed the previous A1/2/3/4/5 and D1/2 use classes to create three new Use Classes; Class E (Commercial, Business and Services), Class F1 (Learning and Non-Residential Institutions), and Class F2 (Local Community). The newly updated Use Classes are set out below:

Class E – Commercial, Business and Services	Class F1 – Learning and Non-Residential Institutions	Class F2 – Local Community
a) Shops b) Restaurants c) The following services: i. Financial services ii. Professional services iii. Other services appropriate in a commercial, business or service locality d) Indoor sport, recreation or fitness centres e) Medical or health services f) Creches, day nurseries and day centres g) For: i. Offices ii. Research and development iii. Any industrial process	a) Schools and education facilities b) Art galleries c) Museums d) Libraries e) Public or exhibition halls f) Places of worship g) Law courts	a) Shops selling mostly essential goods b) Meeting halls c) Areas for outdoor sport, not involving motorised vehicles or firearms d) Swimming pools and ice rinks

1.4.2 In terms of town centre uses, the new Class E encompasses the majority of former A1, A2, A3, B1, D1 and D2 uses and allows changes to another use within the use class to be made without the requirement for planning permission. The changes were introduced in recognition that high streets and town centres have changed towards providing a wider range of facilities and services and to provide the flexibility for businesses to adapt and diversify to meet changing demands. In light of the ongoing Coronavirus pandemic, this was thought particularly important as town centres seek to recover from the economic impacts of the virus.

1.5 Local Planning Policy Context

1.5.1 The adopted development plan for Cannock Chase is the Cannock Chase local Plan Part 1 (LPP1) which was adopted in June 2014. The document incorporates the Core Strategy for the District at section 1, and an Area Action Plan for Rugeley Town Centre at Section 2. Additionally, there is a 'made' Neighbourhood Development Plan for Hednesford which was adopted in November 2018. The Hednesford Neighbourhood Plan (HNP) includes 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.

Local Plan Part 1

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

Policy CP1: Strategy

1.5.3 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

1.5.4 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

1.5.5 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

1.5.6 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.

1.5.7 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.

1.5.8 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.

<u>Policy CP15: Historic Environment</u>

1.5.9 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

1.5.10 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:

<u>Policy RTC1 – Regeneration Strategy</u>

1.5.11 This policy 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 to enhance its focus as a leisure destination.

1.5.12 Regeneration efforts would include the development of key sites within the town centre aided by the development of the (now built) new Tesco store to the east of the canal. Measures would also be aimed at created an improved public realm between the historic centre and the canal.

Policy RCT2 – Town Centre Land Uses

1.5.13 Policy RCT2 sets out the land uses which are to be supported within the town centre. It sets out the presumption in favour of retaining a high proportion of retail (A1) uses at ground floor level within the Primary Shopping Area (PSA). Permission will only be granted to other uses as long they do not have an adverse impact on the vitality and viability of the town centre or its primary retail function and provided they are at first floor level or above.

1.5.14 The policy also states that leisure, business and dense residential uses may also be supported in the areas surrounding the PSA if they are able to demonstrate that they will not detract from its vitality and viability and will help to improve the appearance of the town centre's built environment. This policy also encourages the development of other cultural and leisure facilities in the town centre.

Policy RTC 6 – Rugeley Market Hall/Bus Station and Surrounding Areas

1.5.15 This site-specific policy sets out support for the redevelopment of the Market Hall and Bus Station. It states that comprehensive redevelopment of the site with private sector partners will be pursued to deliver a new market facility, bus station facility, a new anchor store with residential uses above and accessibility improvements.

Policy RTC7 – Land at Wellington Drive

1.5.16 This policy states the aspiration to seek comprehensive mixed-use development of the site comprising a medium sized retail food or non-food store with Food & drink development, office and/or residential uses, and enhancements to pedestrian linkages to surrounding streets.

Policy RTC8 – Leathermill Lane/Trent and Mersey Canal Corridor

1.5.17 Key locations adjacent to, or near the canal will be regenerated to create new public spaces and accessible town centre uses. This includes aspirations to create a new leisure destination on land adjacent to Leathermill Lane Canal Bridge; new development fronting the canal and Love Lane including residential and retail/office uses; and the development of retail warehousing or leisure development at land north of Leathermill Lane.

Emerging New Local Plan

1.5.18 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.

1.5.19 An initial scoping consultation took place in July and August 2018 seeking input on which matters the new Local Plan should consider. With reference to town centre policies, we understand that feedback suggested that the existing centres hierarchy was appropriate.

1.5.20 Another round of consultation took place from May to July 2019. The Issues & Options consultation document set out four options to deliver an objective of creating attractive town centres in the District.

1.5.21 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).

Neighbourhood Plans

1.5.22 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.

1.5.23 The HNP has been produced by Hednesford Town Council with the aims of ensuring several objectives, including ensuring that the town centre in Market Street is supported to retain a viable range of smaller shops and services.

1.5.24 The plan identifies that retaining the character of Market Street is an important element of securing the ongoing vitality and viability of the centre, because it is this character which gives the centre its appeal. Several areas of underused and unattractive land are identified, and the plan recognises that environmental improvements are needed to enhance the experience of visitors accessing the area by train.

1.5.25 Town Centre specific policies to address identified issues are set out in Policies TC1-TC7.

1.5.26 Policy TC1 identifies an area of 'Special Local Character' along Market Street and sets out development management policy guidance on shopfront alterations and other development to ensure that the historic character of the area is maintained and enhanced.

1.5.27 Policy TC2 sets out that the core of Hednesford Town Centre as identified on the Proposals Map will be protected from the introduction of inappropriate uses at ground floor level to ensure that an overall mix of uses where retail, food and drink uses remain predominate is maintained. The policy sets out that residential uses on upper floors of buildings will be encouraged.

1.5.28 Policy TC3 states that the Town Council in partnership with the town traders and other organisations will make representations for the use of appropriate S106 funding for use to enhance the vitality of Market Street.

1.5.29 Policy TC4 relates to an area between Market Street, Victoria Street and off Cardigan Place as identified on the Proposals Map. The policy is supportive of development for a range of uses on this site including residential development, tourist accommodation and a retail market.

1.5.30 Policy TC5 sets out the aspiration to deliver improvements to the car park to the rear of the (now former) Co-op Store to improve the environment surrounding the railway station.

1.5.31 Policies TC6 and TC7 support the extension of the station car park at Anglesey Street and to redevelop a site on Cannock Road for high density residential development for the elderly.

1.1 Introduction

1.1.1 In order to set out the wider context for the Study and inform our advice on the need for additional retail and leisure floorspace in Cannock Chase, this appendix provides an overview of prevailing retail and leisure trends and the Governments response to 'transform town centres'. This overview draws on recognised retail and leisure data sources, including research by Experian, Local Data Company, Global Data and Mintel.

1.2 Economic Context

1.2.1 Covid 19 has had a considerable impact on the UK economy. During lockdown the economy suffered an unprecedented contraction and employment fell significantly. Experian Economics report that consumer demand suffered given social distancing and low confidence, leading to a big drop in social consumption, especially for recreation, leisure and travel. In addition:

- investment fell markedly, as waning business confidence and deteriorating financial positions lead to the postponement and cancellation of projects; and
- exports have been undermined by a fall in international demand for UK goods and services, as other countries enforce lockdown or social distancing measures to varying degrees.

1.2.2 Experian identify that a number of factors will weigh on the recovery over the coming months:

- a more pronounced resurgence in the number of cases of Covid 19 has forced the government to reinstate some restrictions and it looks likely that social distancing measures will remain in place well into 2021
- lingering fears about the virus has led to cautious behaviour from households and businesses, fuelling voluntary social distancing;
- unemployment is expected to rise further;
- a sluggish labour market outlook will constrain the recovery in household incomes and spending; and
- the prospect of fluctuating easing and tightening of restrictions will keep confidence subdued and fuel risk averse behaviours from consumers until an effective treatment is in place.

1.2.3 Overall, the near-term outlook for consumer spending is weak and despite the news of vaccines, Experian do not expect pre Covid 19 pandemic levels to be reached until at least the end of next year (2021).

1.2.4 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. Experian advise that there are a number of elements that will be key to the pace of recovery:

- The effective treatment of Covid-19 and how long social distancing is in place/scale of these measures;
- How successful the government measure are in mitigating the economic impact on households and businesses;
- speed of household and business confidence recovery; and
- Trade and supply chain impacts on industry.

1.3 Continued Rise in Internet Shopping

1.3.1 Experian, in their latest Retail Planner Briefing Note identify that there has been a marked increase in online shopping since the Covid-19 crisis, which has further accelerated the already strong growth trend seen over the past decade. This has lifted the share of internet shopping to a peak of just over 30% of total retail sales at the peak of lockdown.

1.3.2 Internet sales' share in total retail surpassed 19% in 2019 before increasing up to over 30% in 2020 against less than 5% in 2008. The value of internet sales in 2020 is estimated at £102bn at current prices.

1.3.3 After easing in 2021 Experian expect internet market share to continue to grow strongly in the mid term, hitting around 30% in 2027. The pace of e commerce growth is anticipated to moderate over the longer term, reaching 35% of total retail sales by 2040.

1.3.4 Experian highlight that whilst the challenge to traditional store-based shopping from internet-based shopping will continue to grow, a number of factors soften the impact. These factors include:

- Many stores sell online but source sales from regular stores rather than warehouses, implying an increase in required store floorspace to cater for rising internet sales;

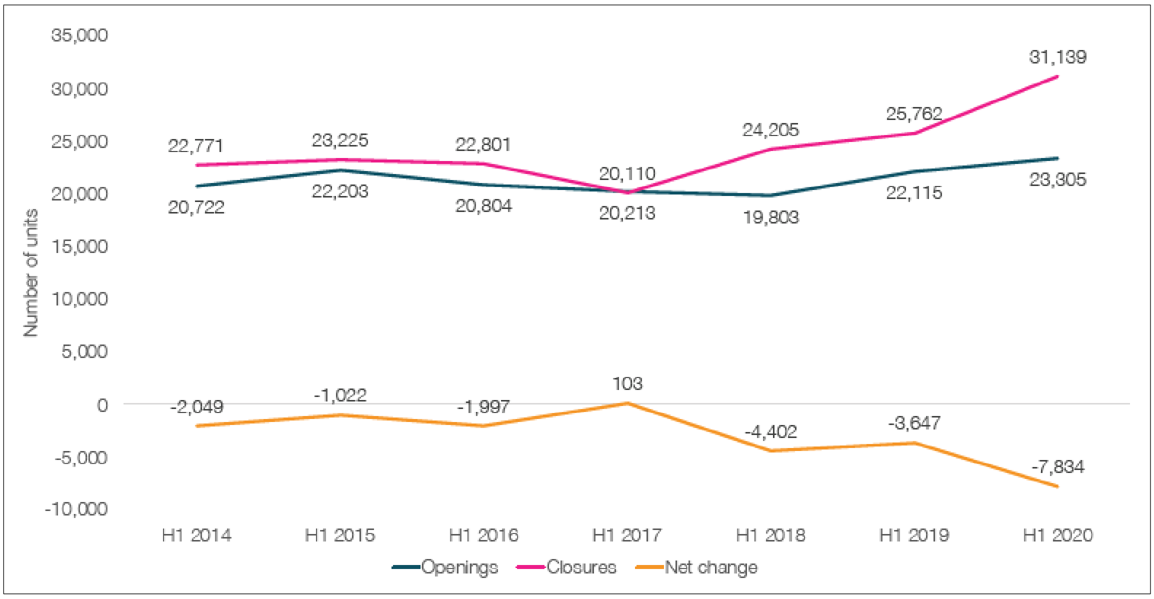
- Even if non-store retailing outpaces store-based shopping, store-based shopping is still expected to continue to expand at an annual average of 1.2% per annum in per capita terms;
- Click-and-collect is an increasingly popular choice with consumers which requires a bricks-and-mortar presence; and
- A significant development is multi-channelling, where internet shopping actually drives demand for traditional outlets. In-store product and services offer (including collection/drop-off points for online orders (click and collect)) forms part of a co-ordinated multi-channel strategy and will continue to support demand for retail space.

1.4 Increased Vacancy Levels & Store Closures

1.4.1 The last several years have been particularly challenging for retail and leisure operators. The retail and leisure industry is currently under pressure with many occupiers finding themselves in an uncomfortable position as margins are squeezed between weakening demand and rising costs.

1.4.2 Local Data Company (LDC) reported (November 2020) that 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 (Figure 1.2). Closures increased by 21% from 2019-2020 with 31,139 shops closing. Interestingly the number of new store openings had increased marginally, albeit this increase is due to market activity pre-Covid-19.

Figure 1.1: Openings and Closures - H1 2014- H1 2020

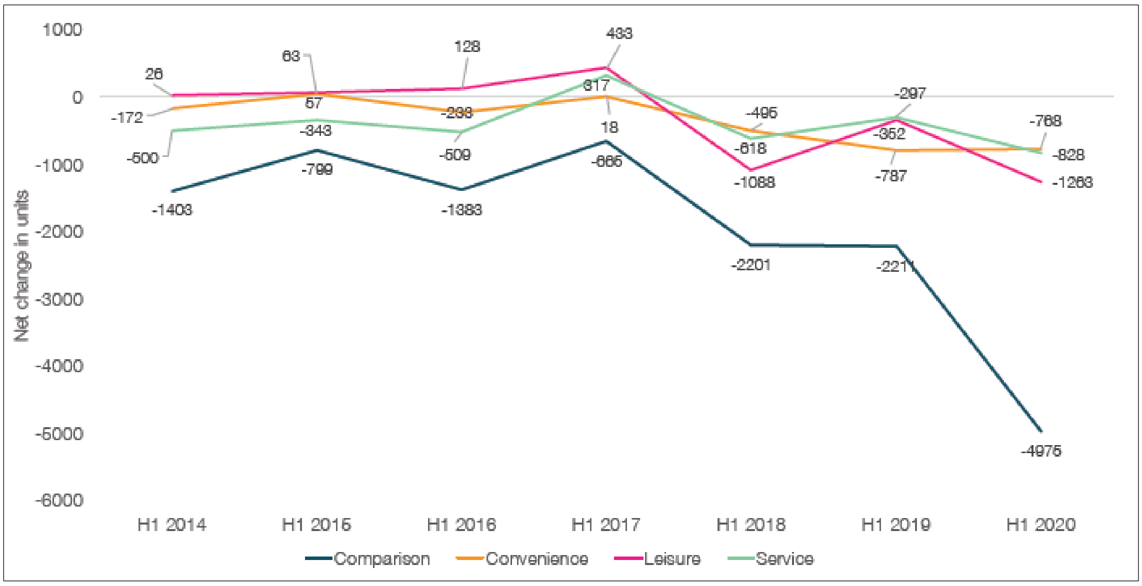


Source: Local Data Company

1.4.3 The research undertaken by LDC identified that, on a sector by sector basis, the comparison goods sector declined the highest in H1 2020 with a net loss of 4,975 units. 500 of these units were as a result of Carphone Warehouse closing all their stores.

1.4.4 The leisure sector saw a loss of some 1,263 units and service sector a loss of 828 units in the first half of 2020. The number of restaurants/pub closures are anticipated to increase by H1 2021 as a result of the impact of Covid-19 (lockdown and curfews).

Figure 1.2: Net Change in Units by Sector



Source: Local Data Company

1.4.5 The number of units in the convenience sector declined by 768, but it was broadly the same as the number of closures in this sector in H1 2019. This is primarily as a result of convenience business remaining open during lockdown.

1.4.6 LDC record that independent businesses have been more resilient than national multiples in H1 of 2020 with the decline lower across all four sectors. In fact, the service sector saw a marginal increase (0.1%) primarily as a result of growth in hairdressing and health and beauty.

1.4.7 Many retailers have found themselves struggling to pay their rents and other overheads, such as a rising minimum wage and business rates. This, together with consumers doing more of their shopping online, which has been compounded by Covid-19, has resulted in a large number of retailers over the last two years restructuring (some involving a Company Voluntary Arrangement (CVA)) or going into administration including:

- Marks & Spencer's announcement that in total it will close 100 stores by 2022. 38 stores were announced as closing in 2018/2019, 30 of which have now closed. A further 17 store closures have since be named by M&S and are set to close in 2019/2020 (January 2019);
- Office Outlet entering administration confirming closure of all its stores (March 2019);
- Boots announcement of plans to close 200 stores by the end of 2020 (July 2019);
- Bathstore falling into administration and subsequently acquired by Homebase. A total of 90 Bathstores have closed with 44 stores to remain open (July 2019);
- Karen Millen (and its subsidiary Coast) going into pre-pack administration with Boohoo acquiring the online business but all 32 stores and 177 concession expected to close (August 2019);
- Jack Wills going into pre-pack administration and with Frasers Groups acquiring the store estate/brand and closing 8 stores (August 2019);
- Thomas Cook entering into administration with Hays Travel acquiring all 555 of its stores (October 2019);
- Mothercare going into administration with its remaining 79 outlets closing (November 2019);
- Bensons for Beds was put into a pre-pack administration and bought by its existing owner (June 2020);
- DW Sports entering into administration and subsequently bought by the Frasers Group. 19 retail outlets and 29 leisure clubs were closed (August 2020);
- M&Co going into administration but bought by its previous owners as part of a pre-pack deal. The new owners have closed 47 of its 218 stores (August 2020);
- Peacocks and Jaegar (part of Edinburgh Woollen Mill) falling into administration with the likely closure of 76 Jaegar and 423 Peacocks stores (November 2020);
- Arcadia Group, which owns Topshop, Dorothy Perkins, Burton and Miss Selfridge) falling into administration. Without a buyer its 444 stores will close (November 2020);
- Debenhams going into administration (April 2020) with the last remaining bidder, JD Sports, withdrawing in November. It is likely that all 124 stores will close (November 2020);

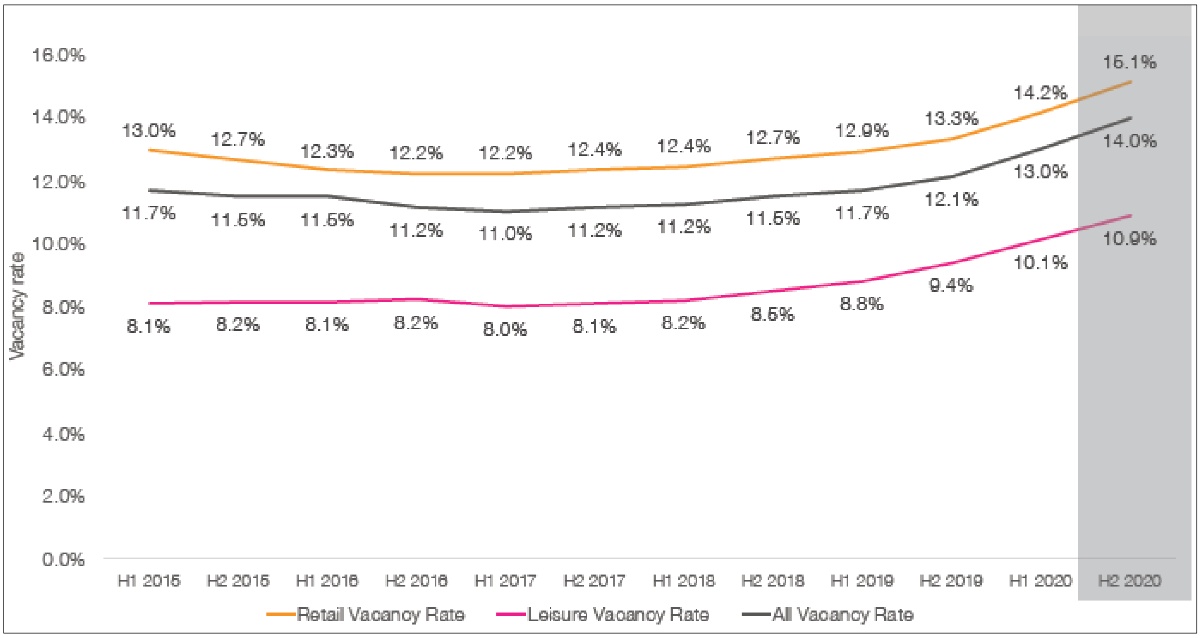
- Bon Marche entering into administration for the second time in a year with the potential for its 225 stores to close (December 2020).

1.4.8 In addition to the above, other retailers/businesses that have restructured or gone into administration in 2020 include: Laura Ashley, Cath Kidston, Hawkins Bazaar, Argos, Evans Cycles, TM Lewin, Go Outdoors, Monsoon, Oak Furnitureland, Quiz, Oasis and Warehouse.

1.4.9 It is clearly evident that current trading conditions for the majority of retailers is very difficult/challenging. Such closures/changes can result in particularly significant impacts at medium/smaller sized town centres, which tend to be the subject of higher vacancy rates, and which have also often suffered related reductions in rental levels and footfall in recent years.

1.4.10 The vacancy rate in town centres has been increasing since 2017 from 11% to 13%. LDC forecast a 1% increase between the 1st and 2nd half of 2020 which would represent the largest increase in a half year. 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 vacancy rates.

Figure 1.3: Vacancy Rate (GB)



Source: Local Data Company

1.5 The Continued Rise of the Grocery Discounters

1.5.1 Shoppers have turned away from food superstores in recent years. Mintel[1] attributes the problems which face superstores to two principal factors.

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

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

1.5.4 As a consequence, the 'big four' foodstore operators (Asda, Morrison's, Sainsbury's and Tesco) have become circumspect in respect of new store openings and, indeed, have closed a number of existing foodstores. All four have suffered significant declines in their market share over the past four to five years.

1.5.5 The most recent strategy of the big four operators has been twofold: (1) the continued development of smaller store formats for top-up food shopping; and (2) the reconfiguration and refurbishment of existing foodstores.

1.5.6 The development of smaller store formats (Sainsbury's Local, Tesco Express, Marks & Spencer Simply Food, and Little Waitrose) has been a trend that has taken place over the last 5 or so years. It is a response to changing food shopping habits and the move from weekly shops to more frequent smaller shops. These smaller store formats are important in driving footfall in smaller district/town centres and in some cases act as a vital 'anchor store'.

1.5.7 In terms of the reconfiguration/refurbishment of existing foodstores, in some cases, product lines are being reduced and pricing is being made straightforward. Some operators are looking to introduce other uses/concessions to take existing floorspace and Sainsbury's acquisition of the Home Retail Group has allowed it to introduce Argos into its stores (and close Argos's standalone stores). Small concessions of Habitat are also currently being tested within a number of Sainsbury's. The introduction of additional uses/concessions in foodstores has the potential to take trade away from town centres.

[1] https://www.mintel.com/

1.5.8 Aldi and Lidl have both sought to take advantage of the structural changes in the food retail market and have announced ambitious store opening targets that will further increase pressure on the big four operators. Aldi has identified major expansion plans and a £1bn investment with plans to open a new store in the UK every week on average until at least September 2021 with a target to have more than 1,000 stores by 2022. Aldi's plans include three formats: standard stores of between 18,000sq ft and 20,000sq ft with a minimum of 70 parking spaces; the 'Small Aldi' format of between 10,000sq ft and 14,000sq ft with a minimum of 40 parking spaces; and, the 'City Aldi' format of between 7,000sq ft to 10,000sq ft with no parking spaces offered. Aldi is understood to be considering all types of property, including development sites, mixed-use schemes, retail parks, high streets, shopping centres and roadside.

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

1.6 The Leisure Sector

1.6.1 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. Eating out has become increasingly popular and both national multiples and independents have benefitted from the additional expenditure which has resulted.

1.6.2 However, even before the Covid-19 pandemic, there was evidence that the food and drink market is becoming saturated with the likes of the following outlets restructuring, closing outlets, or going into administration:

- Byron Burger;
- Ed's Easy Diner;
- Giraffe;
- Prezzo;
- Strada;
- Jaime's Italian;
- Gourmet Burger Kitchen; and
- Chimichanga.

1.6.3 Mintel also reports that although the three biggest operators, Odeon, Vue and Cineworld, still dominate the cinema market and account for 60% of the total UK cinema screens, there has been a steep increase in the number of independent screens. Niche cinema operators, such as

Everyman, Curzon and The Light, are considered to have the potential to be particularly complementary to shopping environments. Such cinemas have more modest land take requirements than large multiplexes, and therefore may have a greater chance of being incorporated in a mixed-use development. Mintel reports that the growth of 'event cinema' and diverse food and drink offerings provided by independents means cinema is becoming a destination for consumers who are not typical cinema fans.

1.6.4 Putting the impact of Covid-19 to one side, the health and fitness sector has been buoyed by the popularity of budget gyms. Operators such as Pure Gym, The Gym Group and easyGym have an operational model which is based on low costs and high volume. Such gyms tend to have plenty of equipment in order to encourage users, but are characterised by basic fit-outs and limited staff. Many budget gym operators – including Pure Gym and The Gym Group – are actively seeking to bring forward additional facilities, with a wide range of properties (including old theatres, larger shop units and office space) having the potential to meet their needs. Pure Gym is now the private health and fitness club market leader in terms of both venue numbers (160 clubs) and memberships. The Gym Group and Anytime Fitness now also both have over 100 clubs, with Xercise4Less, having over 50 gyms.

1.6.5 There are a number of emerging leisure concepts which are also helping to anchor retail environments, including, Virtual Reality (VR) stores, 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. With the exception of VR stores, such concepts do however require reasonably large footprint units/space which primarily due to physical constraints, town centres are not always able to provide/offer.

1.7 Governments Response to 'Transform Town Centres'

1.7.1 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.

1.7.2 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.

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

1.7.4 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 were announced in July 2020 and came into effect in September 2020. The changes 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 as well as including new 'sui generis' uses. 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 new Class E encompasses the majority of former A1, A2, A3, B1, D1 and D2 uses and will allow changes to another use within this use class to be made without the need for planning permission. Though introduced to help town centres, the changes may have unforeseen consequences in enabling the development outside town centres to change within the new Use Class E without requiring planning permission (assuming there are no planning condition restriction attached to the relevant 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.

1.7.5 In June 2020, the Government also published a new Business and Planning Bill which aims to make provision for the promotion of economic recovery and growth following the impacts of the

COVID-19 pandemic. The Bill introduced temporary measures to enable pavement licences to be gained efficiently and inexpensively in order to support businesses selling food and drink as lockdown restrictions are lifted and social distancing guidelines remain in place. Over the summer, alongside the 'Eat Out to Help Out' scheme, this has assisted town centre businesses. However, this temporary measure is likely to be less effective in helping town centres in the colder months.

1.7.6 Given that they have only recently been made, the impact of the Government's amendments to the GDPO have not yet been realised. The key changes are:

- permitted development rights to hold a market and temporary use of land (Schedule 2, Part 4, New Class BA);
- permitted development right for the construction of new homes on detached blocks of flats (Schedule 2, Part 20, Class A); and
- permitted development right for the demolition of vacant and redundant free-standing commercial and light industrial premises (and residential blocks of flats) and their replacement with new residential units (Schedule 2, Part 20, New Class ZA).

1.7.7 Whilst alone they are unlikely to have a material positive impact on town centres, and in terms of the latter, could result in development being bought forward on an allocated site not supported by local plan policy, there may be cases in the future where they could assist Council's and developers in moving forward town centre proposals at a quicker pace which in turn would benefit the vitality and viability of the town centre.

Funding to Support Town Centres

Future High Street Fund

1.7.8 As part of the 2018 Budget, a new £675 million Future High Streets Fund[2] was announced that is intended to assist local areas to respond/adapt to changes in their town centres, by using long term strategies. There was competition for the funding with local areas expected to partner with the private sector in their proposals, which should set out an overall vision of the specific improvements that would contribute to its achievement. It is envisaged that the Fund will then co-fund projects such as:

- investment in physical infrastructure, including improving public and other transport access, improving flow and circulation within a town/ city centre, congestion-relieving infrastructure, other investment in physical infrastructure needed to support new housing and workspace

[2] https://www.gov.uk/government/publications/future-high-streets-fund

development and existing local communities', and the regeneration of heritage high streets; and

- investment in land assembly, including to support the densification of residential and workspace around high streets in place of under-used retail units.'

1.7.9 The fund will also support the regeneration of heritage high streets (up to £55 million of the overall fund). This has two elements: helping to restore historic properties through Historic England; and (2) providing communities with resources to put historic buildings back into economic use.

Stronger Towns Fund

1.7.10 In March 2019, a £1.6 billion Stronger Towns Fund for England was announced by the Government. £1 billion of the new fund is to be allocated using a needs-based formula, with the remaining £600 million being available through a competitive process.

1.7.11 The formula is based on a combination of productivity, income, skills, deprivation metrics and proportion of the population living in towns. This targets funding at those places with economies that are performing relatively less well to the England average, whose residents are living on lower incomes, and where larger proportions of the population have low skill attainment. The Government has allocated some £281m for the North West region.

Towns Fund

1.7.12 As of September 2019, the 'Stronger Towns Fund' and 'Future High Street Fund' were combined and are now collectively referred to by the Government as the 'Towns Fund'. The Prime Minister identified that the Towns Fund involves a total fund of £3.6bn. Whilst this has been referred to as a "new" fund MHCLG confirmed in a press release in September 2019 that this involved an additional commitment of £1.325bn over the previous commitments in the 'Stronger Towns Fund' and 'Future High Street Fund'.

1.7.13 The government has invited 100 towns to develop proposals for funding from the £3.6 bn 'Towns Fund'. The 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.

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

1.7.15 A total of £241m is available to support towns in 2020-2021, and the 100 towns can bid for up to £25m each. The government published a prospectus in November 2019 to guide towns through the process and set eligibility criteria for funding.

1. **Please provide the relevant details of your business:**
(Please note that all details will remain confidential)

Business Name ....

Business Address ....

....

Town ....

Postcode ....

2. **Where is your business located?**

Cannock Town Centre	[ ]
Hednesford Town Centre	[ ]
Rugeley Town Centre	[ ]
Elsewhere in Cannock Chase District	[ ]

Other (please specify) ....

3. **How would you best describe your business?** *(Please tick one box only)*

Food retailer (e.g. grocer, supermarket, off licence, etc.)	[ ]
Non-food retailer (e.g. clothes shop, shoe shop, bookshop, etc.)	[ ]
Retail service (e.g. hairdresser/beauty salon, opticians, travel agents, etc.)	[ ]
Leisure service (e.g. public house, restaurant, café, take-away, etc.)	[ ]
Professional service (e.g. bank, estate agent, betting shop, etc.)	[ ]
Charity shop	[ ]

Other (please specify) ....

4. **Is your business...?** *(Please tick one box only)*

Independent/your own	[ ]
Part of a national/regional group or chain	[ ]

Other (please specify) ....

5. **What are your normal hours of opening?** *(Both during the week and at weekend)*

....

....

6. How long, approximately, has the business traded in this location?

(Please tick one box only)

0 – 6 months	[ ]
7 – 12 months	[ ]
1 – 2 years	[ ]
3 – 5 years	[ ]
6 – 10 years	[ ]
11 – 20 years	[ ]
20+ years	[ ]

7. Why did you choose this location? (e.g. you live in the town; it is an appropriate market for the business, etc.)

………

………

8. During the last five years of trading, has the business…? *(Please tick one box only)*

Grown significantly (+10%)	[ ]
Grown moderately (0% to +10%)	[ ]
Remained largely static	[ ]
Declined moderately (0% to -10%)	[ ]
Declined significantly (-10%)	[ ]

9. Has the Covid-19 pandemic had a negative impact on your business?

Yes	[ ]
No	[ ]

Please provide further details below

…………………………………………………….

10. How would you say that your business is <u>currently</u> performing in comparison to last year? *(Please tick one box only)*

Very well (around a 10% or more increase in profit since last year)	[ ]
Well (around a 5% increase in profit since last year)	[ ]
Moderately (no change since last year)	[ ]
Poorly (around a 5% decrease in profit since last year)	[ ]
Very poorly (around 10% or more decrease in profit since last year)	[ ]

11. What type of customers does your business primarily rely on? *(Please tick one box only)*

Residents from in or around the town centre	[ ]
Residents from elsewhere in Cannock District	[ ]

Residents from outside Cannock District	[ ]
Specialist buyers (i.e. because you offer a specialist product)	[ ]
Workers from the town centre (e.g. office workers)	[ ]
Students from nearby schools and colleges	[ ]
Internet trade	[ ]
Passers-by	[ ]
Tourists	[ ]

Other (Please specify) ……………………………………………………………………………

12. How do you rate the following aspects of your nearest town centre?

<u>Transport</u>	**Good**	**Average**	**Poor**	**Don't Know**
Accessibility by bus	[ ]	[ ]	[ ]	[ ]
Accessibility by train	[ ]	[ ]	[ ]	[ ]
Accessibility by vehicles	[ ]	[ ]	[ ]	[ ]
Accessibility for cyclists	[ ]	[ ]	[ ]	[ ]
Accessibility for pedestrians	[ ]	[ ]	[ ]	[ ]
Amount of car parking	[ ]	[ ]	[ ]	[ ]
Appearance of the entrances to the town centre	[ ]	[ ]	[ ]	[ ]
Approach to parking enforcement	[ ]	[ ]	[ ]	[ ]
Location of car parking	[ ]	[ ]	[ ]	[ ]
Location/number of bus stops	[ ]	[ ]	[ ]	[ ]
Number of bus services/routes	[ ]	[ ]	[ ]	[ ]
Pricing of car parking	[ ]	[ ]	[ ]	[ ]
Provision of disabled car parking	[ ]	[ ]	[ ]	[ ]
Quality of signage for vehicles	[ ]	[ ]	[ ]	[ ]

<u>Business Offer</u>	**Good**	**Average**	**Poor**	**Don't Know**
Number of fast-food restaurants	[ ]	[ ]	[ ]	[ ]
Number of independent traders	[ ]	[ ]	[ ]	[ ]
Number of licensed premises	[ ]	[ ]	[ ]	[ ]
Number of indoor market stalls	[ ]	[ ]	[ ]	[ ]
Number of outdoor market stalls	[ ]	[ ]	[ ]	[ ]
Number of multiple traders	[ ]	[ ]	[ ]	[ ]
Number of restaurants	[ ]	[ ]	[ ]	[ ]
Number of services in general (e.g. hairdressers, banks, etc.)	[ ]	[ ]	[ ]	[ ]
Number of shops in general	[ ]	[ ]	[ ]	[ ]
Number of supermarkets	[ ]	[ ]	[ ]	[ ]
Quality of market	[ ]	[ ]	[ ]	[ ]
Range of services in general	[ ]	[ ]	[ ]	[ ]

Range of shops in general	[ ]	[ ]	[ ]	[ ]
Variety of market traders	[ ]	[ ]	[ ]	[ ]
Access to public services (inc. council, health and leisure)	[ ]	[ ]	[ ]	[ ]

Public Realm/Environment	**Good**	**Average**	**Poor**	**Don't Know**
Amount of signage for pedestrians	[ ]	[ ]	[ ]	[ ]
Attractiveness of the environment (e.g. paving, street furniture, etc.)	[ ]	[ ]	[ ]	[ ]
Cleanliness of the environment	[ ]	[ ]	[ ]	[ ]
Number of events (e.g. Street markets, parades, etc.)	[ ]	[ ]	[ ]	[ ]
Range of events	[ ]	[ ]	[ ]	[ ]
Safety within the public realm	[ ]	[ ]	[ ]	[ ]

Centre Safety/Security	**Good**	**Average**	**Poor**	**Don't Know**
Incidents of anti-social activities	[ ]	[ ]	[ ]	[ ]
Incidents of violent crimes	[ ]	[ ]	[ ]	[ ]
Policing presence	[ ]	[ ]	[ ]	[ ]

Other	**Good**	**Average**	**Poor**	**Don't Know**
Amount of marketing and promotion	[ ]	[ ]	[ ]	[ ]
Availability of Wi-Fi in the centre	[ ]	[ ]	[ ]	[ ]
Image of the centre	[ ]	[ ]	[ ]	[ ]
Range of marketing and promotion (e.g. press, TV, internet, etc.)	[ ]	[ ]	[ ]	[ ]
Town centre management	[ ]	[ ]	[ ]	[ ]

Comments

....

....

....

13. What top three (3) improvement measures would you like to see in the town centre?

(Please tick three (3) boxes only)

A bowling alley	[ ]
A new cinema	[ ]
A new theatre	[ ]
A new foodstore in the town centre	[ ]
A new sports centre	[ ]
Better mix of short/long stay parking	[ ]
Further consultation with retailers and businesses on town centre issues	[ ]
Greater promotion/marketing of the centre	[ ]
Improved access by foot and cycle	[ ]
Improved built environment	[ ]
Improved public toilets	[ ]
Improved public transport	[ ]
Improved security/CCTV	[ ]
Improved signposting	[ ]
Improved street furniture	[ ]
Improved street paving	[ ]
Increased choice/range of shops	[ ]
Lower parking charges	[ ]
Measures to reduce traffic congestion	[ ]
More car parking	[ ]
More commercial offices	[ ]
More cultural facilities (i.e. museum, theatre, etc.)	[ ]
More entertainment/leisure facilities	[ ]
More hotels	[ ]
More independent/specialist traders	[ ]
More national multiples	[ ]
More quality restaurants/pavement cafés	[ ]
More residential development/apartments	[ ]
More specialist markets	[ ]
More street cleaning	[ ]

Other (Please specify) .... [ ]

14. Do you think there is an appropriate mix of shops and other non-retail uses (e.g. banks, building societies, amusement arcades, cafés, pubs and restaurants, fast food outlets, etc.)? *(Please tick one box only)*

Good balance	[ ]
Too many non-retail uses	[ ]
Not enough non-retail uses	[ ]

Please specify ....

15. Aside from the impacts of Covid-19, what do you consider are the three (3) main barriers to the trading performance of your business? *(Please tick three (3) boxes only)*

Anti-social behaviour	[ ]
Business rates	[ ]
Competition from other traders in the town centre	[ ]
If so, where?	
Competition from other traders in the nearby centres	[ ]
If so, where?	
Competition from out-of-centre retail parks/stores	[ ]
If so, where?	
General overheads	[ ]
High rents or mortgage costs	[ ]
Inadequate amount of customer car parking	[ ]
Inappropriate on-street parking regulations	[ ]
Internet	[ ]
Lack of day visitors/tourists to the town	[ ]
Lack of passing trade outside your premises	[ ]
Poor location of your premises (e.g. not prime pitch)	[ ]
Poor security/policing	[ ]
Price of car parking	[ ]
The inadequacy of your current premises (e.g. size or configuration)	[ ]
The quality of the town centre shopping environment	[ ]
Mill Green designer outlet proposal	[ ]
Don't Know	[ ]
None	[ ]

Other (Please specify) ....

16. Have you any plans to alter your business in any way in the next five years?

Yes, relocate elsewhere in the town centre	[ ]
Yes, relocate to another city/town centre	[ ]
Yes, relocate out-of-centre	[ ]
Yes, extend floorspace	[ ]
Yes, reduce floorspace	[ ]
Yes, refurbish existing floorspace	[ ]
Yes, open up a new store	[ ]
Yes, expand range of products	[ ]
Yes, set up a website	[ ]
Yes, start trading on-line	[ ]
Yes, move to an online-only model	[ ]
Yes, close the business	[ ]
Yes, other (Please specify)	
No	[ ]

If you are relocating, where are you considering moving to? ....

If relocating, what is the main reason for this decision? ....

17. What do you consider to be the town centre's biggest competitor?

Other town centres in Cannock District (Cannock, Rugeley or Hednesford)	[ ]
Birmingham City Centre	[ ]
Burntwood Town Centre	[ ]
Burton upon Trent Town Centre	[ ]
Stoke City Centre	[ ]
Lichfield City Centre	[ ]
Merry Hill	[ ]
Shrewsbury Town Centre	[ ]
Stafford Town Centre	[ ]
Telford Town Centre	[ ]
Walsall Town Centre	[ ]
Wolverhampton City Centre	[ ]
Large format supermarkets	[ ]
Out-of-centre retail parks (e.g. Orbital, Linkway)	[ ]
The Internet	[ ]

Other (please specify) ....

18. Why do you consider these centres to be a competitor?

………

………

19. Do you operate any other businesses in any other centres in the West Midlands region?

Yes	[ ]
No	[ ]

20. If YES, where?

………

21. If YES, is this other business trading better, worse or about the same as your business in Cannock Chase District? *(Please tick one box only)*

Better	[ ]
Worse	[ ]
About the same	[ ]

22. Does your business currently have its own website? *(Please tick one box only)*

Yes (go to question 23)	[ ]
No (go to question 27)	[ ]

23. What services does your website provide to customers?

Ability to browse goods available at your premises	[ ]
Ability to order goods directly from the website or make bookings	[ ]
Ability to order goods that will be delivered to a designated address	[ ]
Ability to order goods that can be picked up in store	[ ]
Contact information, e.g. telephone number, store locator, etc.	[ ]
Contact directly via email	[ ]

24. How important is your website to your business? *(Please tick one box only)*

Essential	[ ]
Very important	[ ]
Important	[ ]
Fairly important	[ ]
Of little importance	[ ]

25. **Do customers visit your premises as a result of browsing your website?**

Yes [ ]

No [ ]

26. **Approximately what proportion of your sales are from the internet?**

....

27. **Why do you not have a website?** *(Please ignore if answered YES to question 22)*

Do not have a computer	[ ]
Do not have the skills to produce/run a website	[ ]
In the process of designing a website	[ ]
Not relevant/necessary	[ ]
Too expensive	[ ]
Too time consuming	[ ]

If you have any further comments, please feel free to express your views below.

....

....

....

....

....

....

Thank you for your time and co-operation.

CANNOCK CHASE TOWN CENTRES BUSINESS SURVEY, 2020

Dear Owner/Store Manager,

WYG Planning has been commissioned on behalf of Cannock Chase Council to undertake a survey of town centre businesses across the district.

The survey seeks the views of local businesses as part of a wider 'health check' of town centres in the district that will help to inform the Council's future strategy for the town centres and its response to the impact of Covid-19.

We would be grateful if you could contribute to this study by taking part in the online survey which should take no longer than five minutes to complete. The survey can be completed by visiting https://www.surveymonkey.co.uk/r/CannockChaseTownCentres, or accessed via the QR code provided below.

The survey is fully GDPR compliant and no information on individual businesses will be released. By providing us with this information, you will help the Council shape its redevelopment and planning policies to foster growth and prosperity within the retail, commerce and leisure sectors.

If you have any queries on the survey, or its purpose, please do not hesitate to call John Shakespear at WYG Planning on 0117 2440529 or via email to John.Shakespear@WYG.com. Alternatively, please contact the Council on 01543 464326 (Sushil Birdi) or via email to developmentplan@cannockchasedc.gov.uk.

We would be grateful if you could answer the questionnaire no later than 06 November 2020.

Thank you.

1.1 Introduction

1.1.1 Drawing on the findings of the household telephone survey completed by NEMS, this appendix analyses the retail market share patterns for both convenience and comparison goods shopping within the Study Area.

1.1.2 This section contains a summary of the convenience and comparison goods shopping patterns across the household survey area, and for the three towns across Cannock Chase District. Both main food and top-up convenience goods shopping patterns are analysed and for comparison goods, combined comparison goods shopping patterns are examined. A comparison with the market share findings of the previous 2015 Retail Study is also provided.

1.1.3 An analysis of leisure market share patterns is included as part of the commercial leisure need assessment set out in Appendix E of The Study.

1.1.4 A plan showing the household telephone survey area and zones is attached at **Appendix Di**.

1.2 Convenience Goods Shopping Patterns

1.2.1 The tables at **Appendices Dii & Diii** provide a breakdown of the convenience goods shopping patterns within the study area. The tables show that 64% of main food shopping trips and 59% of top-up food shopping trips from across the survey area are made to foodstores within Cannock Chase District. Internet shopping accounts for 5% of the main food shopping market share, and 1% of top-up food shopping.

Main Food Shopping

1.2.2 An analysis of the shopping patterns shows that 64% of all main food shopping trips made from across the survey area are made to stores in Cannock Chase District, with most of the other trips made to stores in the surrounding areas of Burntwood (16% of all trips), Stafford (5%) and Brownhills (3%)

1.2.3 As expected, the survey results show that most of the trips made to stores outside of the study area are from the zones that are primarily located outside of the District; 84% of trips from Zone 1 (South East Stafford), 83% from Zone 10 (Brownhills) and 78% from Zone 11 (Burntwood & Chasetown) are made to stores elsewhere, though most of the trips from Zones 4 (Colton, Blithbury and Handsacre) and 9 (Cheslyn Hay & Ladywood) which also fall outside of the study area, are shown to be captured by stores within the district (59% from Zone 4, and 81% from

Zone 9). This is predominantly due to a lack of facilities in these areas and good transport links into the District.

1.2.4 Of the survey zones principally falling within Cannock Chase (Zones 2, 3, 5, 6, 7, and 8), Zone 8 (Norton Canes) has the largest proportion of main food shopping trips which are made to destinations outside of the district (50%). 26% of these trips are made to stores in Burntwood, 4% to stores in Walsall, and a combined 17% to other destinations elsewhere. Less than 8% of trips are made from each of Zones 2, 3, 5, 6 and 7 to stores outside of Cannock Chase. Overall the District has a good retention rate of convenience goods shopping trips.

1.2.5 In terms of the three main settlements across Cannock Chase, the following observations can be made:

Cannock

1.2.6 Foodstores within Cannock capture 25% of the market share from across the survey area, drawing trips from each of the survey zones apart from Zones 1 (South East Stafford) and 4 (Colton, Blithbury and Handsacre). 67% of main food shopping trips are retained from those within Zone 7 (Cannock), 38% from Zone 6 (North Cannock), 18% from Zone 5 (Hednesford), and 9% from Zone 8 (Norton Canes). Notably, 54% of all trips from Zone 9 (Cheslyn Hay & Landywood), which falls outside of the district, are also made to stores within Cannock, primarily due to the towns good transport links and relative position within the south west of the District.

1.2.7 The Asda store on Avon Road is the most popular store within Cannock overall (10% of trips from across the survey area), however the Morrisons at Mill street attracts the most trips from those residents in the town (Zone 7) at 34%. Asda captures 21% of the trips made from Zone 7, but 24% from Zone 9, 15% from Zone 6 and 9% from Zone 5, a higher proportion than any of the other foodstores.

1.2.8 Of the two foodstores outside of Cannock Town Centre, the Asda on Rumer Hill is the most popular, though it attracts only 3% of main food shopping trips from Zones 6 and 7, and 1% of trips from Zones 5, 8 & 9.

Rugeley

1.2.9 Foodstores in Rugeley attract 10% of all main-food shopping trips in the survey area, though reflecting the position of the town in the north of the district, these trips are all made from Zones 1-4, and the town does not attract trips from anywhere else.

1.2.10 The retention of shopping trips within Rugeley is the highest across the district, with 88% and 91% of trips retained by stores from those living nearby (in Zones 2 – West Rugeley, and 3 – East Rugeley). The town also attracts a high proportion of trips (56%) 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.

1.2.11 The large Tesco store on Power Station Road is the most popular main food destination in Rugeley, attracting 38% of trips from Zone 2, 35% from Zone 3 and 30% from Zone 4. Morrisons on Market Street is the next most popular, followed by Aldi, and then Iceland.

1.2.12 Other smaller stores in Rugeley attract only 1% of trips from Zone 3, and do not attract trips from any of the adjacent survey zones.

Hednesford

1.2.13 Just under half of main food shopping trips from residents closest to Hednesford (Zone 5) are made to facilities in the town (48%) with all of these trips being made to either the Tesco at Victoria Shopping Park (29%) or the Aldi at Chase Gateway (19%). These stores also capture 30% of the market share from the adjacent Zone 6, North Cannock (14% of trips to Tesco and 16% to Aldi).

1.2.14 Reflecting Hednesford's central position with the district, stores in the town exert some influence on shopping patterns across the survey area and attract a limited proportion of trips from each of the other survey zones apart from Zone 1. In total, foodstores in the town attract 12% of all main-food shopping trips made.

Top Up Food Shopping

1.2.15 **Appendix Diii** summarises the proportion of 'top-up' food shopping trips made at retailers located within Cannock Chase, based upon the results of the household survey.

1.2.16 From scrutiny of the household survey results, we note that a slightly smaller proportion of top-up shopping trips from across the survey area are made at stores within Cannock Chase (59% for top-up vs 65% for main food), however the proportion of trips made to the various retailers within the district is different.

1.2.17 As is to be expected, a higher proportion of top-up food shopping trips are made to smaller convenience stores which serve a different market to larger foodstores/supermarkets. This exemplified by stores such as the Co-op on Redbrook Lane in Brereton which attracts 24% of top-up food shopping trips from Zone 3 but only 1% of main food shopping trips, and by the Co-op on Brownhills Road in Norton Canes which attracts 25% of the top-up food trips from Zone 8 compared with 8% of main-food shopping from the same zone.

1.2.18 Other trends evident within the main towns across Cannock Chase are outlined below:

Cannock

1.2.19 Foodstores in Cannock attract 19% of top-up shopping trips from across the survey area compared with 25% of trips for main food shopping. Of these trips, 15% are made to stores in the town centre, and 3% to the stores just outside.

1.2.20 Cannock retains 53% of trips from Zone 7, 14% less than main-food shopping. Of these, 47% are made to stores within the town centre, and 6% to those elsewhere. Unlike for main food shopping where Morrisons on Mill Street was the most popular, the Asda store at Avon Road attracts the most top-up food shopping trips from Zone 7 (20%) 3% more than Morrisons on Mill Street. Aldi on Walsall Road attracts 7% of trips, Iceland attracts 1% and other stores in the town centre attract a combined 3% of trips.

1.2.21 Notably, a higher proportion of top-up trips from Zone 7 are made to other stores in the district outside of the main town centre area of Cannock than for main food shopping. 23% of trips are made to stores on Bideford Way to the south west of Cannock, and 9% of trips are made to the Sainsbury's at Orbital Retail Park.

1.2.22 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 the adjacent zones 5, 6, 8 and 9. Across each zone of these zones, a lower proportion of top-up food shopping trips are made to Cannock compared to main-food trips.

Rugeley

1.2.23 As evident with the main food shopping patterns, facilities within Rugeley also attract a high proportion of top-up food shopping trips from Zones 2, 3 and 4, though to less of an extent. From Zone 2, 70% of top-up shopping trips are retained by stores in the town centre (29% to Tesco on Power Station Road, 22% to Morrisons, and 8% each to Aldi and Iceland) and 22% of trips are made to other stores just outside of the centre. 14% of these trips are made to the Co-op at Springfield Road in Etching Hill, and 6% to the Spar on Green Lane.

1.2.24 From Zone 3, 52% of trips are made to stores in Rugeley (compared with 91% for main-food shopping), with 46% made to stores elsewhere in the district. These include the Co-op at Redbrook Lane, Brereton (24% of trips), the Co-op at The Peartree Centre, Queensway (8% of trips) and McColl's at Coppice Road (7%).

1.2.25 40% of top-up food shopping trips are made to stores in Rugeley from those in Zone 4, and 7% to other stores in the district. The remaining trips are made to facilities outside of Cannock Chase District.

1.2.26 Facilities in Rugeley also attract a small proportion of the top-up food market share from Zone 1 (4%) and Zone 5 (1%).

Hednesford

1.2.27 A smaller proportion of top-up food trips from across the survey area made to Hednesford compared with main food shopping trips (8% vs. 12%), though stores in the town still exert an influence across the district, attracting trips from each of the survey zones in Cannock Chase apart from Zone 8.

1.2.28 43% of top-up food shopping trips are retained in Hednesford from its survey zone (Zone 5), with the Tesco at Victoria Shopping park attracting the majority of the these (32%), the Aldi at Chase Gateway attracts 8% and stores outside of the town centre attract a combined 4% of trips (3% to the OneStop at Rosehill, and 1% to the Morrisons Daily on Uxbridge Street.

1.3 Comparison Goods Shopping Patterns

1.3.1 A table detailing the comparison goods shopping patterns across the survey area is provided at **Appendix Div** with a plan illustrating the distribution of trips at **Appendix Dv**. Overall, facilities in Cannock Chase attract 41% of comparison shopping trips from across the survey zones, 28% of trips are made to destinations outside of the district, and 30% of 'trips' are made online.

1.3.2 Stafford, as the closest large centre to the north of the Cannock Chase is the most popular shopping destination outside of the district, attracting 7% of all shopping trips from the study area, while Lichfield, Tamworth, Birmingham, Walsall and Burntwood are also attract visitors, with each between 2% and 4% of the market share.

Cannock

1.3.3 Cannock Town Centre attracts trips from across the study area. 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

Rugeley

1.3.4 As with the trends apparent for convenience shopping, facilities in Rugeley predominantly draw comparison shopping trips from Zones 1-4 with 37% of trips from Zone 3 made to facilities in the town centre, 31% of trips made from Zone 2, 19% from Zone 4, and 1% from Zone 1. A limited proportion of trips are also made from Zones 5, 6, 10 and 11 to the town, however these account for less than 1% of trips from each of three zones.

Hednesford

1.3.5 The limited comparison goods offer in Hednesford means that the town centre retains only 8% of the market share from its zone (Zone 5). The town's central location within Cannock Chase means that a small proportion of trips are made to the centre from each of the other zones including 2% of trips from Zone 2 (West Rugeley), 1% each from Zones 1, 2, 3 and 10, and less than 1% from the remaining zones.

District and Local Centres

1.3.6 Due to their small size and relatively limited comparison goods offer, only 2% of comparison shopping trips from across the survey area are made to district and local centres in Cannock Chase. Bridgtown and Hawks Green are the most popular local centre destinations, attracting the majority of these trips.

Other Facilities in Cannock Chase

1.3.7 22% of all comparison goods shopping trips made in Cannock Chase are to out-of-centre destinations. The Orbital Retail and linkway Retail Parks are the most popular of these destinations each attracting 8% of all trips from across the survey zones. Stores at Wyrley Brook Retail Park and along Walsall Road to the south east of Cannock also attract a significantly significant number of trips, with other out-of-centre stores in the district attracting a combined 2% of the market share.

1.4 Internet

1.4.1 The NEMS survey results identify that, for certain comparison goods, many residents in the study area prefer shopping online. The goods most commonly bought online are books, CDs and DVDs (between 16% and 65% of the market share), small electrical goods (11-39%), large household electrical items (15-42%) and toys, games, bicycles & other sporting or recreational goods (12-50%). As expected, Chemist goods and DIY items are the least common comparison goods to be purchased online, at 0-13% and 0-10% respectively.

1.4.2 For convenience goods, the level of online main food shopping varies between 1% and 8%.

Figure 1.1 Internet Shopping Market Share (%)

	Zone										
	1	2	3	4	5	6	7	8	9	10	11
Main Food Shopping	8	3	1	6	12	2	3	1	6	2	7
Clothing and Footwear	33	26	29	33	36	44	39	35	42	24	37
Books, CDs & DVDs	65	56	47	76	57	79	34	70	62	62	68
Furnishings & Textiles	23	24	15	39	32	16	8	20	26	30	34
Small Household Goods	43	9	9	16	19	5	14	18	15	17	25
Clocks, Jewellery &	29	36	30	29	22	52	51	50	35	50	37
Toys/Games, Bikes &	29	36	44	47	57	60	26	30	44	38	57
Chemist Goods	9	11	7	7	9	10	7	13	5	13	19
Large Household Electrical	42	47	24	40	46	44	17	29	38	34	50
Small Electrical Goods	37	35	23	41	41	35	22	31	28	23	40
Furniture, Carpets, Flr	11	13	5	20	30	14	28	9	12	20	10
DIY & Gardening Goods	10	7	8	8	8	2	15	2	4	8	4

Source: Derived from NEMS Household Survey Results (October 2020)

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

Figure 1.2: Online Purchases Delivery Method

Goods Category	Online Delivery Method (%)		
	Delivery	Click and Collect	Downloaded
Main Food	90	10	N/A
Clothing & Footwear	96	4	N/A
Books, CDs & DVDs	86	1	13
Furnishings & Household Textile Goods	88	11	N/A
Small Household Goods	97	3	N/A
Clocks, Jewellery, Watches	97	3	N/A
Toys/Games, Bikes & Others	97	3	N/A
Chemist Goods	98	2	N/A
Large Household Electricals	96	4	N/A
Small Electrical Goods	97	3	N/A
Furniture, Carpets & Floor Coverings	97	3	N/A
DIY incl. Gardening Goods	94	6	N/A

Source: Derived from NEMS Household Survey Results
Note: Figures may not add due to rounding

1.4.4 In summary, the results show that:

- for online convenience goods shopping, 90% of goods were delivered with 10% purchased via 'Click and Collect';
- over 86% of all comparison goods categories were home delivered;
- purchases of furnishings and household textile goods were the most commonly collected from store (11%); and
- roughly 13% of purchases for books, CDs and DVDs were downloaded rather than delivered or collected from store.

1.5 Change in Shopping Patterns between 2015 & 2020

1.5.1 The 2015 Retail Study used retail expenditure rather than trip rates when examining shopping patterns across Cannock Chase District. The following section therefore provides a broad comparison between the patterns identified in 2015 and those identified in this study (see Appendix I for full expenditure shopping patterns data). It should be noted that the expenditure patterns exclude internet shopping.

1.5.2 Caution should be exercised when comparing the data from each study due to potential methodological variances in the design and interpretation of household survey results. Notwithstanding this however, it is possible to draw broad patterns and conclusions when assessing changes in expenditure patterns between 2015 and 2020.

Convenience Goods

1.5.3 Figure 1.3 provides a summary of convenience goods expenditure in Cannock, Rugeley and Hednesford Town Centres and for selected large foodstores within the District in 2015 and 2020.

Figure 1.3: Main Food Shopping Market Share 2015 - 2020

Centre	2015 Market Share (%)	2020 Market Share (%)
Cannock Town Centre	18	18
Rugeley Town Centre	17	16
Hednesford Town Centre	12	14
Selected large foodstores within the District		
Asda, Avon road, Cannock	10	8
Morrisons, Mill Street, Cannock	4	6
Aldi, Walsall Road, Cannock	3	4
Morrisons, Market Street, Rugeley	4	5
Tesco, Power Station Road, Rugeley	6	7
Aldi, Market Street, Rugeley	5	3
Tesco, Victoria Shopping Park, Hednesford	10	8
Aldi, Chase Gateway, Hednesford	4	5
Sainsbury's, Orbital Retail Park	11	8
Tesco, Hawks Green	6	5
Cannock District Total	**65**	**65**

Source: 2015 Retail & Leisure Study and derived from NEMS household survey 2020.
Note: Figures may not add due to rounding

1.5.4 Between 2015 and 2020 the retention of convenience goods expenditure within Cannock Chase has remained consistent with 65% of spending from across the survey area made at stores within the district. There are some variances in indicated expenditure, but the proportion of expenditure at stores in Cannock Town Centre remains consistent at 18%. Spending at stores in Rugeley Town Centre is indicated to have fallen by 1%, while stores in Hednesford are shown to have increased their capture of the market share by 2%.

1.5.5 In terms of the individual foodstores across the district, the market share captured by each store is shown to vary slightly from 2015 to 2020, with the largest change at the out-of-centre Sainsbury's at Orbital Retail Park which has seen its market share drop by 3%.

Comparison Goods

1.5.6 Figure 1.4 provides a summary of comparison goods expenditure in Cannock, Rugeley and Hednesford, in out-of-centre destinations in the District and in destinations outside Cannock Chase at 2015 and 2020.

Figure 1.4: Comparison Goods Expenditure Market Share 2015 - 2020

Centre	2015 Market Share (%)	2021 Market Share (%)
Cannock Town Centre	19	14
Rugeley Town Centre	5	7
Hednesford Town Centre	2	3
Orbital Retail Park	8	9
Wyrley Brook Retail Park	<1	4
Cannock Chase Total	**44**	**49**
Stafford	15	17
Birmingham	3	3
Lichfield	5	7
Out of Centre Total	**56**	**51**

Source: 2015 Retail & Leisure Study and derived from NEMS household survey 2020.
Note: Figures may not add due to rounding

1.5.7 Since 2015, the comparison goods expenditure patterns indicate that retail destinations within Cannock Chase District have increased their overall retention of expenditure across the survey area from 44% to 49%.Despite this, the market share of expenditure claimed by Cannock Town centre has reduced from 19% to 14% though it has increased in both Rugeley (from 5% in 2015 to 7% in 2020) and Hednesford (2% to 3%).

1.5.8 The market share claimed by out-of-centre retailers in the district is shown to have increased, with Wyrley Brook Retail Park in particular indicating growth from less than 1% to now capturing 4% of the market share. Orbital Retail Park is also shown to have increased its market share capture, albeit at a more modest 1% increase since 2015.

1.5.9 Outside of Cannock Chase, figures suggest that the influence of retailers in Stafford and Lichfield in particular have increased, though the overall market share captured by destinations outside of the district has decreased from 56% to 51%.

Appendices

Appendix Di: Household Survey Zone Plan

Appendix Dii: Main Food Shopping Patterns

	Zone										
	1	2	3	4	5	6	7	8	9	10	11
Cannock Town Centre	-	2%	<1	-	17%	35%	64%	8%	53%	2%	3%
Other Stores in Cannock	-	-	-	-	1%	3%	3%	1%	1%	-	<1%
Rugeley Town Centre	5%	87%	91%	56%	-	-	-	-	-	-	-
Other Stores in Rugeley	-	<1%		-	-	-	-	-	-	-	-
Hednesford Town Centre		2%	2%	1%	48%	30%	3%	2%	2%	4%	3%
Other Stores in Hednesford	-	-	1%	-	-	-	-	-	-	-	-
Other Stores in the District	3%	1%	4%	2%	15%	27%	25%	38%	25%	9%	9%
Outside Study Area	84%	5%	3%	34%	7%	3%	2%	50%	13%	83%	78%
Internet	8%	3%	1%	6%	12%	2%	3%	1%	6%	2%	7%

Source: NEMS household Survey
Note: Figures may not add up to 100% due to rounding

Appendix Diii –Top-up Food Shopping Patterns

	Zone										
	1	2	3	4	5	6	7	8	9	10	11
Cannock Town Centre	6%	1%	-	-	10%	19%	47%	3%	21%	2%	1%
Other Stores in Cannock	-	-	-	-	2%	12%	6%	-	-	-	-
Rugeley Town Centre	3%	70%	51%	40%	1%	-	-	-	-	-	-
Other Stores in Rugeley	-	22%	-	-	-	-	-	-	-	-	-
Hednesford Town Centre	-	2%	<1%	-	40%	16%	5%	-	<1%	-	2%
Other Stores in Hednesford	-	-	-	-	3	-	-	-	-	-	-
Other Stores in the District	>1%	3%	46%	7%	22%	53%	38%	52%	15%	5%	7%
Outside Study Area	87%	1%	1%	53%	18%	1%	4%	45%	64%	93%	90%
Internet	3%	1%	>1%	-	5%	-	-	1%	-	-	-

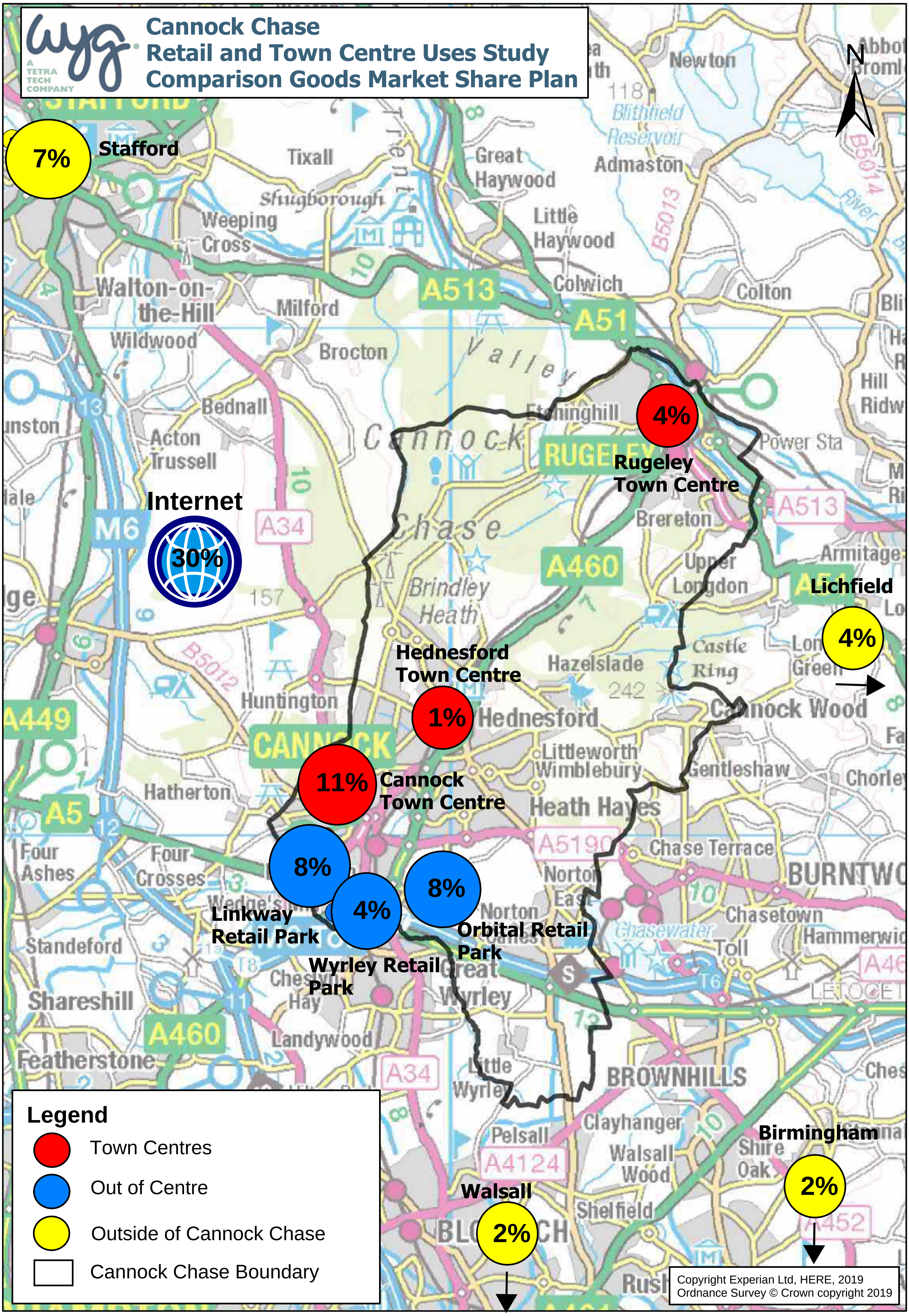
Source: NEMS household Survey
Note: Figures may not add up to 100% due to rounding

Appendix Div –Comparison Goods Shopping Patterns

	Zone										
	1	2	3	4	5	6	7	8	9	10	11
Cannock Town Centre	1%	3%	2%	2%	13%	17%	25%	8%	9%	2%	5%
Other Stores in Cannock	-	<1%	<1%	1%	1%	3%	2%	2%	<1%	<1%	1%
Rugeley Town Centre	1%	31%	37%	18%	<1%	<1%	-	-	-	<1%	<1%
Other Stores in Rugeley	-	<1%	<1%	1%	-	-	-	-	-	-	-
Hednesford Town Centre	1%	1%	1%	0%	8%	2%	>1%	>1%	>1%	1%	<1%
Other Stores in the District	3%	10%	11%	7%	23%	34%	36%	31%	42%	21%	15%
Outside Study Area	63%	27%	26%	39%	21%	12%	12%	30%	20%	46%	43%
Stafford	56%	15%	13%	4%	9%	3%	3%	2%	1%	1%	>1%
Birmingham	1%	3%	1%	1%	2%	1%	0%	1%	2%	2%	3%
Lichfield	1%	3%	4%	12%	2%	1%	0%	2%	1%	5%	9%
Walsall	>1%	>1%	>1%	>1%	2%	1%	1%	8%	4%	11%	1%
Others	53%	5%	7%	21%	6%	6%	20%	17%	12%	27%	29%
Internet	30%	27%	22%	32%	32%	33%	24%	28%	29%	29%	35%

Source: NEMS household Survey
Note: Figures may not add up to 100% due to rounding

Appendix Dv – Plan Showing Comparison Goods Shopping Market Share by Town/Destination


Cannock Chase
Retail and Town Centre Uses Study
Comparison Goods Market Share Plan
A TETRA TECH COMPANY
N
7%
Stafford
Internet
30%
4%
Rugeley
Town Centre
Hednesford
Town Centre
1%
11%
Cannock
Town Centre
8%
4%
8%
Linkway
Retail Park
Wyrley Retail
Park
Orbital Retail
Park
Lichfield
4%
Birmingham
2%
Walsall
2%
Legend
Town Centres
Out of Centre
Outside of Cannock Chase
Cannock Chase Boundary
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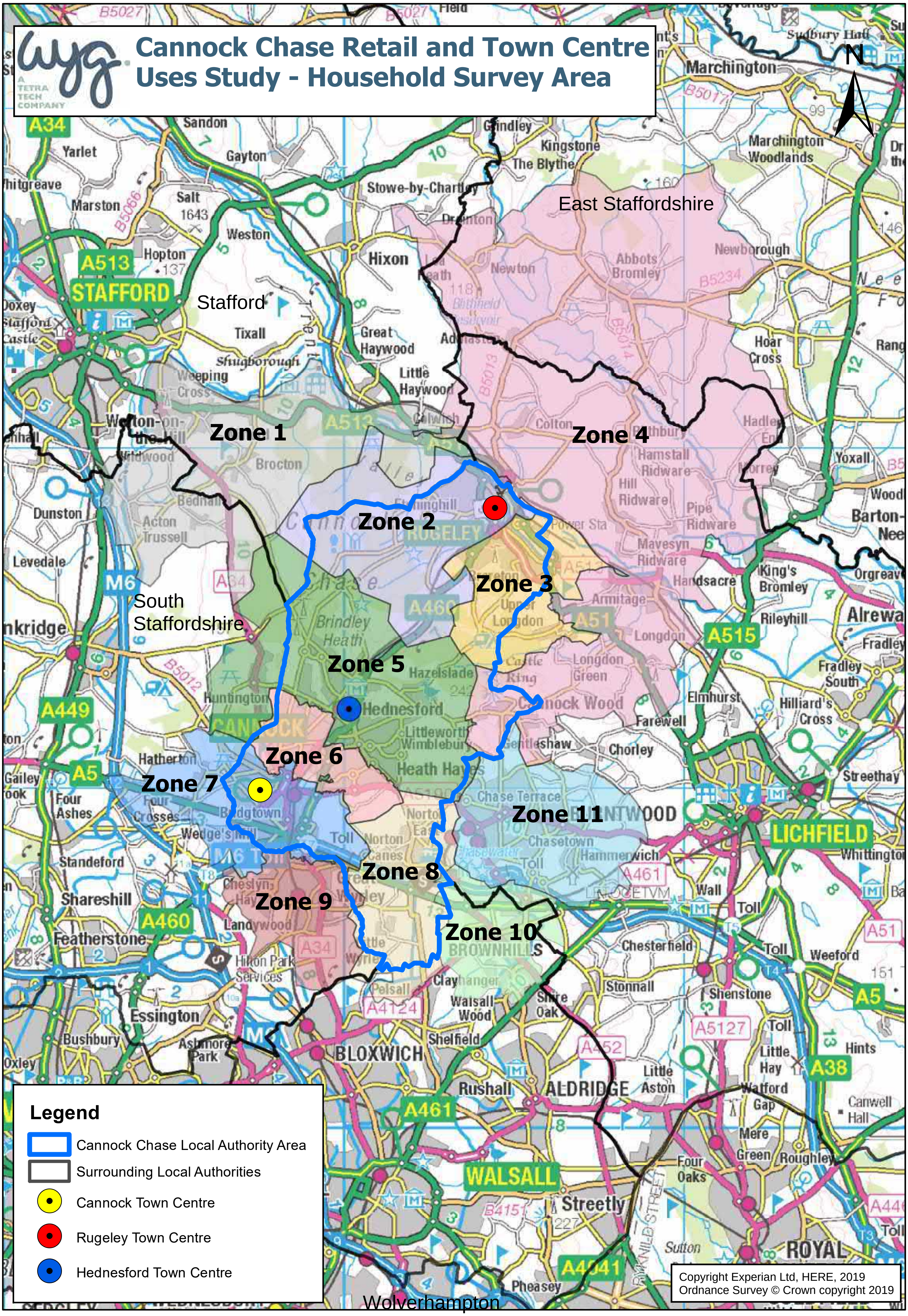

Cannock Chase Retail and Town Centre Uses Study - Household Survey Area
Zone 1
Zone 2
Zone 3
Zone 4
Zone 5
Zone 6
Zone 7
Zone 8
Zone 9
Zone 10
Zone 11
East Staffordshire
Stafford
South Staffordshire
Wolverhampton
Legend
Cannock Chase Local Authority Area
Surrounding Local Authorities
Cannock Town Centre
Rugeley Town Centre
Hednesford Town Centre
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Ordnance Survey © Crown copyright 2019

1.1 Introduction

1.1.1 Our approach to the assessment of quantitative need in the leisure market necessarily differs from our retail methodology for a number of reasons, including the fragmentation of the market and the limited availability of accurate data. However, the household survey undertaken to inform the Study asked respondents questions about their use of commercial leisure facilities and, through reference to market share, we are therefore able to form a view as how Cannock Chase currently meets the needs of its population in relation to the restaurant and café/coffee shop, health and fitness gym, cinema, and ten-pin bowling markets.

1.1.2 There can be limitations to survey research, particularly with regard to the sample size which can be achieved and the use of contact by home telephone only. The results should therefore be taken only as a broad indication of consumer preferences.

1.1.3 We also use national statistics in respect of the typical level of provision of specific types of facilities to assist our judgement in respect of the likely future need for additional facilities in Cannock Chase. By reference to estimated increases in the Study Area population, this 'benchmarking' exercise informs our judgement in respect of the likely future needs.

1.1.4 In considering future commercial leisure provision, it should be noted that certain types of facility are often provided in locations proximate to large centres. The analysis that follows seeks to apportion future growth in commercial leisure provision on the basis of the current market shares of the towns in the district, but this should be viewed with some flexibility in respect of how opportunities that come forward 'on the ground' can appropriately contribute to meeting identified needs.

1.1.5 We have considered the responses from each of the 11 survey zones within our analysis, but necessarily concentrate on the zones which primarily fall within Cannock Chase District. These are:

- Zone 2 – West Rugeley
- Zone 3 - East Rugeley
- Zone 5 - Hednesford
- Zone 6 – Cannock North
- Zone 7 – Cannock
- Zone 8 – Norton Canes

1.1.6 For each leisure sector, we consider the current broad patterns of existing use, before then assessing the need for additional facilities to 2040.

1.2 Participation Leisure Activities

1.2.1 Figure 1.1 examines participation rates for a range of leisure activities across the survey area. It is shown that the most popular single activity is to visit restaurants, which an average of 71% of respondents visit. This is followed by visits to cafes and coffee shops (59%), visits to pubs and bars (58%) and trips to the theatre or to concert halls (45%). Less popular activities include visiting family entertainment venues (16%) and nightclubs (4%).

Figure 1.1: Participation in Leisure Activities by Zone (%)

Facility	Zone 1 – South East Stafford	Zone 2 – West Rugeley	Zone 3 – East Rugeley	Zone 4 – Colton, Blithbury and Handsacre	Zone 5 – Hednesford	Zone 6 – North Cannock	Zone 7 – Cannock	Zone 8 – Norton Canes	Zone 9 – Cheslyn Hay & Landywood	Zone 10 – Brownhills	Zone 11 – Burntwood & Chasetown	Total
Restaurants / cafés	3%			1%	8%	4%	6%	3%	4%	1%	2%	3%
Bars / pubs			1%		3%	1%		3%	3%		1%	1%
Better shopping facilities		5%	1%	5%	3%				4%	6%	0%	2%
Cinema		24%	16%	15%	12%	9%	10%	6%	5%	9%	19%	11%
Concert hall / venue	1%	1%			1%	7%	3%		1%	1%	1%	2%
Health & fitness (gym)		1%	4%		5%			14%		1%	1%	1%
Museum / art galleries	1%	1%	1%			1%						0%
Theatre	2%	2%			3%		1%	1%	1%	1%	2%	1%
Bowling alley	3%	9%	5%	3%	4%	10%	7%		4%	11%	10%	7%
Ice rink	1%	1%										0%
Leisure centre	1%	2%	5%			1%	1%	1%	1%	1%	1%	1%
Children’s’ facilities / activities	3%	9%	7%	8%	5%	14%	5%	2%	6%	7%	12%	8%
More sports facilities	1%	2%	6%	5%	5%	2%		2%	2%	1%	2%	2%
Play / park facilities	1%	1%			2%	2%	1%	1%		3%	1%	1%
Swimming pool	5%	6%	6%	12%	1%	1%	1%	4%	1%	2%	5%	3%
Other	9%	12%	16%	6%	5%	10%	8%	3%	6%	13%	9%	8%
(None)	79%	51%	55%	59%	58%	61%	67%	73%	70%	65%	57%	63%

Source: NEMS Household Survey results
Notes: Multiple responses will mean that figures do not add up to 100%
Blank spaces indicate a zero response

1.2.2 Residents in Zone 5 (Hednesford) indicated higher than average participate rates in 7 of the 10 activities mentioned, while Zone 7 (Cannock) has the lowest proportion of those who said they did not undertake any of the mentioned activities in the district (8%).

1.2.3 Zone 3 (East Rugeley) has the highest proportion of those that indicate they do not take part in any activities (14%), followed by those in Zone 8, Norton Canes (13%). Those in Zone 8 also show the lowest overall average participation rates (an average of 30% for each activity) within the district. This may be expected given the zone's location away from the main settlements as residents may not necessarily have access to as many leisure facilities as those in other areas.

Figure 1.2: Leisure Facilities that respondents would like to see more of, by zone

Facility	Zone 1 – South East Stafford	Zone 2 – West Rugeley	Zone 3 – East Rugeley	Zone 4 – Colton, Blithbury and Handsacre	Zone 5 – Hednesford	Zone 6 – North Cannock	Zone 7 – Cannock	Zone 8 – Norton Canes	Zone 9 – Cheslyn Hay & Landywood	Zone 10 – Brownhills	Zone 11 – Burntwod & Chasetown	Survey Area Average
Commercial Leisure Facilities												
Restaurants / cafés	3%			1%	8%	4%	6%	3%	4%	1%	2%	3%
Bars / pubs			1%		3%	1%		3%	3%		1%	1%
Better shopping facilities		5%	1%	5%	3%				4%	6%	0%	2%
Cinema		24%	16%	15%	12%	9%	10%	6%	5%	9%	19%	11%
Concert hall / venue	1%	1%			1%	7%	3%		1%	1%	1%	2%
Health & fitness (gym)		1%	4%		5%			14%		1%	1%	1%
Museum / art galleries	1%	1%	1%			1%						0%
Theatre	2%	2%			3%		1%	1%	1%	1%	2%	1%
Bowling alley	3%	9%	5%	3%	4%	10%	7%		4%	11%	10%	7%
Ice rink	1%	1%										0%
Other Leisure Facilities												
Leisure centre	1%	2%	5%			1%	1%	1%	1%	1%	1%	1%
Children's' facilities activities	3%	9%	7%	8%	5%	14%	5%	2%	6%	7%	12%	8%
More sports facilities	1%	2%	6%	5%	5%	2%		2%	2%	1%	2%	2%
Play / park facilities	1%	1%			2%	2%	1%	1%		3%	1%	1%
Swimming pool	5%	6%	6%	12%	1%	1%	1%	4%	1%	2%	5%	3%
Other	9%	12%	16%	6%	5%	10%	8%	3%	6%	13%	9%	8%
(None)	79%	51%	55%	59%	58%	61%	67%	73%	70%	65%	57%	63%

Source: NEMS Household Survey
Notes: Multiple responses will mean that figures do not add up to 100%

1.2.4 When respondents were asked what additional leisure facilities they would like to see more of in their area, a new cinema was the most popular answer (11%) across the survey area followed by additional children's facilities or activities (8%), and a bowling alley (7%).

1.2.5 On average, 63% of people across the survey area and 61% of those across Cannock Chase indicated that they would not like to see any more of the mentioned leisure facilities suggesting that they are generally satisfied with the current leisure provision. The lowest proportion of respondents not wanting to see any more leisure facilities are in Zone 2 (West Rugeley), while the highest is Zone 8 (Norton Canes) where 73% indicated that they didn't want any more. Notably, this is an area with generally low participation rates, as referenced above.

1.3 Restaurant & Cafés/Coffee Shops

1.3.1 Figure 1.3 summarises the proportion of restaurant trips directed to the most popular destinations inside and outside Cannock Chase based upon the results of the household survey. It identifies that 68% of visits made by residents across the survey area are to restaurants outside of Cannock Chase with the most popular destinations identified as Lichfield City Centre (13% of trips), Stafford Town Centre (9%), Burntwood Town Centre (7%), Brownhills Town Centre, and Birmingham City Centre (both 4%).

1.3.2 31% of all trips from across the survey area are collectively made to restaurants in 'other destinations' outside of the district. Although a relatively high proportion when combined, none of these destinations attract more than 2% of trips individually. Of the zones within Cannock Chase, Zones 7 (Cannock) and 8 (Norton Canes) have the highest proportion of trips made to these 'other destinations' (41% and 42% respectively). From Zone 7, the most popular destination outside of the district is Wolverhampton City Centre (7% of trips), while from Zone 8, it is Bloxwich Town Centre (9%).

1.3.3 In terms of the town centres within Cannock Chase, Figure 1.3 shows:

- Cannock Town Centre attracts 22% of trips overall from the survey area. It retains 48% and 47% from those within its immediate zones (Zones 6 – Cannock North, and Zone 7 – Cannock) and also attracts 22% of trips from Zone 5 (Hednesford) and 19% from Zone 8 (Norton Canes). 30% of restaurant trips are also made to Cannock Town Centre from Zone 9 (Cheslyn Hay & Landywood) which falls outside of Cannock District, and a small proportion are also made from Zones 3 (East Rugeley), 10 (Brownhills) and 11 (Burntwood & Chasetown)
- Facilities in Rugeley Town Centre attract just 4% of trips from across the survey area, but they are shown to retain 45% and 42% from the immediate zones 2 & 3 (West Rugeley and East Rugeley). 10% of restaurant trips from Zone 4 (Colton, Blithbury and Handsacre) also made to Rugeley Town Centre and a very limited proportion of trips are also made

from Zones 5 (Hednesford), 6 (North Cannock), 7 (Cannock) and 9 (Cheslyn Hay & Landywood).

- Hednesford Town Centre retains 11% of the restaurant market share from Zone 5 (Hednesford) and attracts between 1-4% 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 of 11% is generally considered to be reasonable.

Figure 1.3: Study Area Market Share for Restaurant Visits

Facility	Zone 1 – South East Stafford	Zone 2 – West Rugeley	Zone 3 – East Rugeley	Zone 4 – Colton, Blithbury and Handsacre	Zone 5 – Hednesford	Zone 6 – North Cannock	Zone 7 – Cannock	Zone 8 – Norton Canes	Zone 9 – Cheslyn Hay & Landywood	Zone 10 – Brownhills	Zone 11 – Burntwod & Chasetown	Total
Cannock Town Centre			3%	7%	22%	48%	47%	19%	30%	5%	3%	22%
Rugeley Town Centre		45%	42%	10%	1%	1%	3%		1%			4%
Hednesford Town Centre		1%		1%	11%	4%		2%			1%	2%
Other inside Cannock Chase		2%	4%	6%	1%	3%	4%	4%	1%	3%		4%
Outside District	**100%**	**52%**	**50%**	**77%**	**61%**	**41%**	**45%**	**70%**	**65%**	**88%**	**96%**	**68%**
Lichfield City Centre	1%	9%	6%	32%	14%	9%		6%	2%	14%	33%	13%
Stafford Town Centre	66%	11%	12%	1%	16%	11%	3%	1%	3%		1%	9%
Burntwood Town Centre					1%	1%		2%			31%	7%
Brownhills Town Centre					1%	1%		20%		31%	4%	4%
Birmingham City Centre		1%		1%	1%	3%			16%		9%	4%
Other destinations	33%	30%	32%	43%	28%	16%	41%	42%	44%	44%	18%	31%

Source: NEMS Household Survey
Notes: Figures may not add due to rounding

1.3.4 Given its relative size to the other centres, the comparatively low rate of trips made to Cannock Town Centre indicate that it is not an attractive destination for eating out indicates a deficiency in provision. This supports our own review/health check findings.

1.3.5 Turning to cafes and coffee shops, Figure 1.4 shows that 45% of all trips from the survey are made to cafes and coffee shops within Cannock Chase. Cannock Town Centre captures the biggest market share of the café and coffee shop market across the district, attracting 25% of all trips made. Rugeley Town Centre and Hednesford Town Centre both attract 7% each of trips.

Figure 1.4: Study Area Market Share for Cafe Visits

Facility	Zone 1 – South East Stafford	Zone 2 – West Rugeley	Zone 3 – East Rugeley	Zone 4 – Colton, Blithbury and Handsacre	Zone 5 – Hednesford	Zone 6 – North Cannock	Zone 7 – Cannock	Zone 8 – Norton Canes	Zone 9 – Cheslyn Hay & Landywood	Zone 10 – Brownhills	Zone 11 – Burntwod & Chasetown	Total
Cannock Town Centre	1%	1%	1%		19%	47%	59%	27%	36%	11%	4%	25%
Rugeley Town Centre	10%	81%	61%	20%	5%				1%			7%
Hednesford Town Centre	2%		1%		41%	13%	1%	8%		1%		7%
Hawks Green District Centre												
Norton Canes Local Centre			1%					9%		1%	6%	2%
Heath Hayes Local Centre					1%							0%
Chadsmoor Local Centre												
Bridgtown Local Centre			1%						1%			0%
Fernwood Drive Local Centre												
Brereton Local Centre												
Other inside District			1%			6%	11%	5%	7%	2%	4%	5%
Outside District	**87%**	**18%**	**34%**	**80%**	**34%**	**34%**	**29%**	**52%**	**55%**	**85%**	**86%**	**55%**
Lichfield City Centre		3%	9%	43%	9%	13%		15%	7%	24%	49%	18%
Stafford Town Centre	69%	4%	12%	3%	4%	9%	1%	8%				8%
Burntwood Town Centre					2%					1%	23%	5%
Brownhills Town Centre				7%				7%		36%	2%	3%
Birmingham City Centre			2%	1%					16%			1%
Others	18%	11%	11%	26%	19%	11%	28%	22%	32%	25%	12%	19%

Source: NEMS Household Survey
Notes: Figures may not add due to rounding

1.3.6 Lichfield City Centre is shown to be the most popular destination for visits to cafes and coffee shops outside of the district. It attracts 18% of all trips, including 9% from Zones 3 and 5 (East Rugeley and Hednesford), and 15% from Norton Canes.

1.3.7 Figure 1.4 also shows that:

- Cannock Town Centre retains 59% and 47% of the café/coffee market share respectively from those in Zone 7 (Cannock) and Zone 6 (Cannock North), and attracts 19% and 36% from Zones 5 (Hednesford) and Zone 8 (Norton Canes). Cafes and coffee shops in the town centre also attract 36% of trips from Zone 9 (Cheslyn Hay & Landywood), 11% from

Zone 10 (Brownhills), 4 % from Zone 11 (Burntwood & Chasetown) and 1% each from Zones 1-3. As the largest centre in the district, the influence of facilities in Cannock Town Centre on the rest of the survey area are to be expected, however we would perhaps expect that a slightly higher proportion of trips were retained from the immediate survey zones (6 & 7), indicating a slight deficiency in provision. There is an opportunity to provide additional café and coffee shop facilities in Cannock through the redevelopment of key sites and reoccupation of vacant units.

- Rugeley Town Centre retains 81% of trips from Zone 2 (West Rugeley) and 61% from Zone 3 (East Rugeley), they also attract 20% of trips from Zone 4 (Colton, Blithbury and Handsacre), 10% of trips from Zone 1 (East Stafford). On our visits to the centre, we noted that the 4 cafes in the town centre were busy, suggesting that there is capacity for additional facilities within Rugeley.
- Facilities in Hednesford retain 41% of trips from Zone 5 (Hednesford) and attract 13% of trips from Zone 6 (Cannock North) and 8% from Zone 8 (Norton Canes). They also capture a small proportion of the market share from Zones 1 (South East Stafford), 3 (East Rugeley), 7 (Cannock) and Zone 10 (Brownhills). Given the local focus of the town centre, and its proximity to Cannock, the retention figures do not necessarily reflect a material deficiency in café/coffee shop provision in the town centre.

1.4 Health and Fitness

1.4.1 As identified in Figure 1.1, the household survey indicates that 27% of respondents across the study area visit indoor health and fitness facilities. Of the participating respondents, the main destinations mentioned are summarised in Figure 1.5.

1.4.2 Health and Fitness facilities in Cannock Chase attract 53% of all indoor health and fitness trips from within the survey area, with 33% of these trips made to facilities in Cannock, Rugeley or Hednesford Town Centres, 6% made to facilities within local centres, and 14% to other out-of-centre facilities.

Figure 1.5: Study Area Market Share for Indoor Health & Fitness by Zone

Facility	Zone 1 – South East Stafford	Zone 2 – West Rugeley	Zone 3 – East Rugeley	Zone 4 – Colton, Blithbury and Handsacre	Zone 5 – Hednesford	Zone 6 – North Cannock	Zone 7 – Cannock	Zone 8 – Norton Canes	Zone 9 – Cheslyn Hay & Landywood	Zone 10 – Brownhills	Zone 11 – Burntwod & Chasetown	Total
Cannock Town Centre	6%	2%		2%	15%	44%	32%	7%	26%	4%	2%	19%
Rugeley Town Centre	2%	78%	75%	45%				3%				7%
Hednesford Town Centre		2%	3%		31%	11%	3%	21%			2%	7%
Hawks Green District Centre												
Norton Canes Local Centre								3%				0%
Heath Hayes Local Centre						2%						0%
Chadsmoor Local Centre						5%						1%
Bridgtown Local Centre						2%	11%	7%	15%		2%	4%
Fernwood Drive Local Centre												
Brereton Local Centre			3%									0%
Nuffield, East Cannock Rd		2%				15%			2%	7%		4%
Chase Leisure Centre	8%				2%	5%	13%	3%	5%			4%
Other inside District		9%	17%	5%	13%	13%	6%		3%			6%
Outside District	**85%**	**7%**	**3%**	**48%**	**40%**	**3%**	**35%**	**57%**	**50%**	**90%**	**94%**	**47%**
Lichfield City Centre			3%	10%	16%			9%		15%	21%	7%
Stafford Town Centre	53%	2%			2%							5%
Burntwood Town Centre				21%	11%	2%					52%	13%
Brownhills Town Centre								14%	2%	13%	2%	2%
Birmingham City Centre									16%			2%
Others	31%	5%		17%	11%	2%	35%	33%	32%	61%	19%	19%

Source: NEMS Household Survey
Notes: Figures may not add due to rounding

1.4.3 Cannock Town Centre attracts the highest proportion of trips (19%) across the survey area. The town centre retains 44% of trips from Zone 6 (North Cannock) and 32% from Zone 7 (Cannock), and it is also shown to attract a significant proportion of trips from Zone 9 (Cheslyn Hay & Landywood) and to a lesser extent from Zone 5 (Hednesford). A smaller proportion of trips is also made from Zones 1, 2, 8, 10 and 11.

1.4.4 As shown with other shopping and leisure trip patterns, Rugeley retains a high proportion of trips from its associated survey zones (78% from Zone 2 and 75% from Zone 3), and it also attracts a comparatively high proportion of trips from Zone 4, at 45%. There are several facilities within the town centre including Anytime Fitness on Brewery Street, Gymophobics on Market Street, and martial arts and boxing clubs on Wellington Drive. We consider that the indoor fitness market is reasonably well catered for.

1.4.5 Hednesford retains 31% of the market share from its zone (Zone 5) and attracts 21% of trips from Zone 8 (Norton Canes), and 11% from Zone 6 (Cannock North). Facilities in the town centre are also shown to attract a small proportion of trips from Zones 2 and 3, 7 and 11).

1.4.6 In terms of other facilities in the district, it is notable that Bridgtown Local Centre attracts 4% of all trips from the survey zone. There are several gyms in this locality, including Xhersize, a ladies only fitness and wellbeing facility. Other popular facilities in the district include the Nuffield Health Centre on East Cannock Road, and Chase Leisure Centre and Golf Course on Stafford Road. Both of these attract 4% of trips each from the survey area.

1.4.7 In terms of improvements to health & fitness facilities in Cannock Chase, an average of only 1% of respondents across the survey zone, and 4% of those within the district suggested that they would like to see more health & fitness facilities in their area. This indicates that respondents are generally satisfied with the current provision. We do note however, that the 'Requirements List' suggests that at least one gym operator is seeking floorspace in Cannock.

1.4.8 Having regard to the small projected increase in population across the survey area, there is unlikely to be a quantitative need for additional health and fitness gym facilities within the minimum NPPF need period to 2031. However, there may be capacity for a new facility by the end of the local plan period in 2040. We have sought to quantify this likely requirement based on current rates of participation in Figure 1.6 below. In considering the requirements set out, it should be noted that a new modern conveniently located indoor health and fitness facility is likely to result in some new gym members and in turn an uplift in participation rates.

1.4.9 The increase in population anticipated in the Study Area in the period to 2031 is anticipated to be 3,027, as noted in Figure 1.6. Applying the market share for indoor health and fitness gym facilities in Cannock Chase (53%), this identifies potential for approximately 1,600 new gym members within this area. Information published by a number of health and fitness operators identify that typical/average members per health and fitness gym facility ranges from 2,800 to 3,500 members and therefore based on this, there is not likely to be a need for further facilities during this period. When projected to 2040, the population increase of 5,356 means that there is potential for approximately 2,840 new gym members within the area meaning there could be a theoretical capacity for an additional facility within Cannock Chase by this time.

Figure 1.6: Health and Fitness Gym Requirement in Cannock (2021-2040)

	Survey Area Population Increase	Typical Population Required to Support New Gym	Survey Area Custom Claimed	Potential No. of New Gyms Supported
2021-2026	1,723	2,800 - 3,500	53%	-
2021-2031	3,027	2,800 - 3,500	53%	-
2021-2036	4,321	2,800 – 3,500	53%	-
2021-2040	5,356	2,800 – 3,500	53%	1

Note: Typical population required to support new gym sourced from information published by gym operators (including company account reports/accounts)

1.4.10 There is not currently forecast capacity for a new facility by 2031 (the NPPF minimum plan period) though we note there is indicated interest from an operator for a new facility in Cannock. Should any proposals come forward we recommend they are judged on their own merits in accordance with relevant town centre planning policy at the time of any application's submission.

1.5 Cinemas

1.5.1 As shown at Figure 1.2, 11% of respondents across the survey zone indicated that they would like another cinema in their area. This was most popular response when asked, and it indicates a general deficit in provision across the District.

1.5.2 The only cinema in the district is the Electric Palace Picture House in Cannock. It provides two screens with a total of 430 seats. Although centrally located, it is separated from the main shopping area by the busy A4601 Mill Street. The cinema does not have many complementary leisure uses such as restaurants and bars nearby, which cinema goers come to expect as part of the overall offer.

1.5.3 As shown in Figure 1.7, only 13% of cinema trips across the study area are made to the cinema in Cannock, including 32% of trips from Zone 7 (Cannock) and 20% from Zone 6 (Cannock North).

Figure 1.7: Study Area Market Share for Cinema Visits

Facility	Zone 1 – South East Stafford	Zone 2 – West Rugeley	Zone 3 – East Rugeley	Zone 4 – Colton, Blithbury and Handsacre	Zone 5 – Hednesford	Zone 6 – North Cannock	Zone 7 – Cannock	Zone 8 – Norton Canes	Zone 9 – Cheslyn Hay & Landywood	Zone 10 – Brownhills	Zone 11 – Burntwod & Chasetown	Total
Electric Palace, Cannock		10%		10%	8%	20%	32%	24%	12%	2%	5%	13%
Outside District												
Cineworld, Bentley Bridge		3%	7%		10%	18%	25%	10%	21%	16%	1%	11%
Odeon, Tamworth		15%	6%	27%	8%	2%	1%	15%		4%	48%	16%
Odeon, Stafford	92%	49%	34%	10%	35%	26%	15%	11%		2%		19%
Showcase, Walsall			12%		12%	19%	10%	6%	19%	12%	10%	11%
The Light, Walsall		2%	2%	1%	5%	2%	8%	32%	16%	62%	13%	11%
Cineworld, Burton			12%	14%		13%	3%		4%		9%	6%
Others	8%	21%	27%	38%	21%		6%	2%	29%	2%	6%	11%

Source: NEMS Household Survey
Notes: Figures may not add due to rounding

1.5.4 In terms of the influence of cinemas outside of the district, the Odeon in Stafford attracts the highest proportion of trips from across the survey area (19%) including 49% of trips from West Rugeley (Zone 2), 34% from East Rugeley (Zone 3), 35% from Hednesford (Zone 5), and 26% from North Cannock (Zone 6). Other popular cinemas include the Odeon in Tamworth (16% of all trips), Cineworld at Bentley Bridge in Wolverhampton (11%) and The Light and Showcase cinemas in Walsall that also attract 11% of all trips.

1.5.5 Global market research company Mintel estimates that the UK population on average visits a cinema 2.7 times per annum and that each cinema screen attracts around 42,927 separate admissions. Applying these benchmark averages to the survey area, we estimate that there will be 542,562 cinema admissions arising from the population at 2021, increasing to 550,735 admissions by 2031 and 557,024 admissions by 2040. Based on the assumed number of visits per screen, we calculate that 12.6 screens can be supported in the Study Area at 2021, increasing slightly to 12.8 screens at 2031, and then to 13 screens at 2040. Our calculations are set out in Figure 1.8 below:

Figure 1.8: Cinema Screen Requirement in Study Area

Year	Survey Area Population	Number of Cinema Visits Per Person	Attendance	Number of Admissions Required to Support Screen	Screens Supported
2021	200,949	2.7	542,562	42,927	12.6
2026	202,672	2.7	547,214	42,927	12.7
2031	203,976	2.7	550,735	42,927	12.8
2036	205,270	2.7	554,229	42,927	12.9
2040	206,305	2.7	557,024	42,927	13

1.5.6 Based on the current market share (13%), our calculations shown in Figure 1.9 indicate that 2 cinema screens could currently be supported in Cannock Chase. Given there is currently only one small cinema in the district we consider that it is reasonable to suggest the market share claimed by facilities in Cannock Chase would grow significantly if another cinema were provided.

Figure 1.9: Cinema Screen Requirement in Cannock Chase

Year	Screens Supported	Study Area Custom Claimed by Cannock Chase	No. of Screens Supported in Cannock Chase
2021	12.6	13%	1.6
2026	12.7	13%	1.7
2031	12.8	13%	1.7
2036	12.9	13%	1.7
2040	13	13%	1.7

1.5.7 In terms of reviewing cinema requirements on a qualitative basis, having regard to the size of the district and existing cinema provision, we consider that a new cinema could be supported within the District. Should the development ambitions in Cannock Town Centre be realised, a planned medium sized cinema at Church Street 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.

1.6 Tenpin Bowling

1.6.1 There are currently no ten-pin bowling facilities in Cannock Chase with the nearest facilities being Hollywood Bowl at Bentley Bridge in Wolverhampton, Namco Funscape in Tamworth, and Tenpin at Greyfriars Place in Stafford. Figure 1.11 sets out market share claimed by each of these facilities from the survey area.

Figure 1.11: Study Area Market Share for Tenpin Bowling Visits

Facility	Zone 1 – South East Stafford	Zone 2 – West Rugeley	Zone 3 – East Rugeley	Zone 4 – Colton, Blithbury and Handsacre	Zone 5 – Hednesford	Zone 6 – North Cannock	Zone 7 – Cannock	Zone 8 – Norton Canes	Zone 9 – Cheslyn Hay & Landywood	Zone 10 – Brownhills	Zone 11 – Burntwod & Chasetown	Total
Outside District												
Hollywood Bowl, Bentley Bridge					19%	11%	55%	32%	83%	49%		19%
Namco Funscape, Tamworth		17%		27%					12%	46%	83%	39%
Tenpin, Greyfriars Place, Stafford	35%	66%	100%	46%	70%	53%	30%	68%	5%		13%	30%
Others	65%	17%		27%	11%	36%	15%			6%	4%	12%

Source: NEMS Household Survey
Notes: Figures may not add due to rounding

1.6.2 As shown in Figure 1.2, 7% of those asked mentioned that they would like to see an additional bowling alley in their local area. Given the absence of any facilities within the district, there could be potential for Cannock Chase to be able to accommodate a facility, however, at the current time there are no requirements from any operators to open a new facility in the district. We recommend, should the redevelopment of the multi-storey car park and Market Hall in Cannock Town Centre come forward in the medium term, that the Council investigate the potential for accommodating a small ten-pin bowling occupier alongside a cinema and food and drink uses.

1.7 Arts and Cultural Facilities

1.7.1 Arts and cultural activities play an important role in providing a distinct identity to places or towns, as well as being an important contributor to the local economy. Research by the Centre for Economic and Business Research (CEBR) in 2020 has quantified that for every pound of GVA generated by the arts and culture industry, an additional £1.23 of GVA is generated in the wider economy through wider indirect and induced multiplier impacts of the industry. CEBR identify that the arts and culture sector was estimated to have produced an aggregate turnover of £64.2 billion and was the responsible for the employment of approximately 461,000 people in the UK in 2018.

1.7.2 For the purpose of this assessment, consideration is given to the provision of museums, art facilities and theatres within Cannock. The main cultural venues are considered to be the Prince of Wales Theatre in Cannock, and the Museum of Cannock Chase in Hednesford.

1.7.3 It is also important to note towns and individual settlements can be important attractors in themselves, with facilities such as churches, cathedrals and sporting venues which add to their overall appeal to visitors.

1.7.4 The results of the household survey indicate that 31% of respondents from across the survey area visit museums and galleries while theatres and concert venues are even more popular with some 45% of respondents visiting these venues.

1.7.5 In terms of trips made to art and cultural facilities, the household survey (Figure 1.15) indicates that only 12% of trips are made to attractions in Cannock Chase with 88% of trips being made outside of the study area, mostly to Birmingham, London, Wolverhampton and Lichfield. Within Cannock Chase, facilities in Cannock Town Centre are the most popular destination attracting 11% of all trips. Facilities in Rugeley and Hednesford together attract only 1% of trips.

1.7.6 The popularity of Birmingham, Wolverhampton and Lichfield as destinations is not surprising given the easy access and proximity to Cannock Chase of each destination. Birmingham is a nationally important cultural centre with attractions including the Barber institute of Fine Art, The Birmingham Museum and Art Gallery and the Symphony Hall. Wolverhampton also has numerous art galleries and museums, while Lichfield also has many attractions including it’s cathedral, the Garrick Theatre and several museums.

Figure 1.15: Study Area Market Share for Art/Cultural Activities (Theatres, Galleries & Museums)

Facility	Zone 1 – South East Stafford	Zone 2 – West Rugeley	Zone 3 – East Rugeley	Zone 4 – Colton, Blithbury and Handsacre	Zone 5 – Hednesford	Zone – North Cannock	Zone 7 – Cannock	Zone 8 – Norton Canes	Zone 9 – Cheslyn Hay & Landywood	Zone 10 – Brownhills	Zone 11 – Burntwod & Chasetown	Total
Cannock Town Centre	5%	11%	6%	1%	9%	21%	23%	2%	9%	8%	2%	11%
Rugeley Town Centre		2%		1%								0%
Hednesford Town Centre		1%	1%		4%			2%			1%	1%
Outside District	**95%**	**85%**	**93%**	**98%**	**86%**	**79%**	**77%**	**96%**	**91%**	**92%**	**97%**	**88%**
Birmingham	22%	18%	19%	30%	33%	22%	17%	33%	55%	47%	35%	30%
Central London / West End	14%	23%	28%	16%	12%	18%	1%	16%	13%	9%	28%	16%
Wolverhampton	8%	6%	4%	2%	15%	8%	50%	16%	12%	12%	1%	15%
Lichfield	3%	17%	16%	22%	5%	24%	2%	15%	3%	14%	23%	14%
Stafford	26%	10%	2%			3%			3%			2%
Others	**22%**	**12%**	**23%**	**28%**	**22%**	**4%**	**7%**	**17%**	**6%**	**10%**	**10%**	**12%**

1.7.7 Overall, having regard to the size of Cannock Chase and its towns, the provision of arts and cultural facilities across the district is considered to be somewhat lacking though demand/need for additional provision is likely to be limited due to the location of existing, more comprehensive cultural facilities nearby. Given this, we recommend that further consideration should be given to ways of promoting the existing facilities in the district. Though no specific new facilities should be planned for, if any future proposals for new cultural development come forward, we recommend they are supported in accordance with relevant town centre planning policy at the time of submission. In order to maintain and improve current participation rates however, and to help increase the number of visitors to borough in general, consideration should be given to ways of further promoting existing facilities.

Mosaic UK
Classifications

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

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

Mosaic UK
Classifications

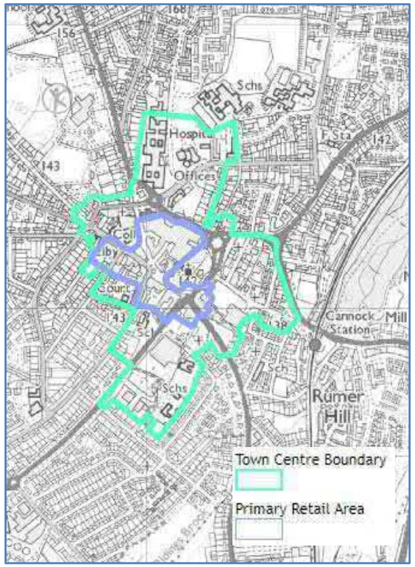
I Family Basics	I36	Solid Economy	Stable families with children renting better quality homes from social landlords
	I37	Budget Generations	Families supporting both adult and younger children where expenditure can exceed income
	I38	Childcare Squeeze	Younger families with children who own a budget home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

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

Cannock Town Centre Health Check Appraisal

Cannock is the largest centre and the principal retail and commercial destination in the District. The town is situated to the north of the West Midlands conurbation and is well connected to other major settlements in the region by the A5 and A34, and the M6 and M6 toll motorways.

The town centre, as designated in the 2014 Policies Map extends as far north as Cannock Chase Hospital and the Council Offices, and to the Asda foodstore at Hunter Rd/Avon Street to the south. The main shopping area within the town centre is relatively compact and is concentrated along the pedestrianised area of Market Place and Market Hall Street. The defined Primary Retail Area also includes parts of Avon Road, Church Street, Mill Street, Newhall Street and Wolverhampton Road.



The main shopping area in Cannock primarily comprises the Cannock Shopping Centre, Prince of Wales Theatre, Market Hall, The Forum shopping arcade and the now closed multi-storey car park. These developments are closely associated with one-another and their development dates from the 1960s to the 1980s. The areas are now somewhat rundown and have concentrations of vacant units.

The Ringway, a busy duel carriageway road runs through the town centre to the north and east of the main shopping area, effectively separating it from the rest of the town centre beyond.

The Council has identified several areas in the town centre as 'Opportunity Sites' which if redeveloped, would help to revitalise the town centre. These 'Opportunity Sites' set out within the recently published (September 2020) Development Prospectus. As a short term priority, the prospectus sets out redevelopment of the multi-storey car park and Market Hall ('Site A') for an anchor mixed use leisure and commercial development including a new cinema, food & beverage units and the possible integration of residential apartments, hotel or office space on its upper levels. Other sites in the town centre that are earmarked for redevelopment include the bus station ('Site B') for a possible hotel and conferencing facility; Beecroft Road Car Park ('Site C') for new residential, retail or commercial office use; and Backcrofts Car Park to the south of the main shopping area, for residential use incorporating possible office and/or ancillary retail uses ('Site F'). In the longer term, a site off Avon Road/Hallcourt Lane ('Site I') is identified for a mixed-use development incorporating residential accommodation and specialist leisure facilities.

We note also that the Cannock Town Centre Partnership, who represent the interests of local businesses and other stakeholders in the town centre has produced an 'Environmental Sector Report' outlining suggested improvements and development opportunities within the town centre. These include support for the redevelopment of the multi-storey car park for additional business and leisure uses, accessibility improvements from Walsall Road to the main shopping area, and the introduction of alternative uses for the bandstand in Market Square to bring further activity to the town centre.

Photographs of Cannock Town Centre

Photograph 1: Market Hall Street

Photograph 2: Cannock War Memorial, Market Place

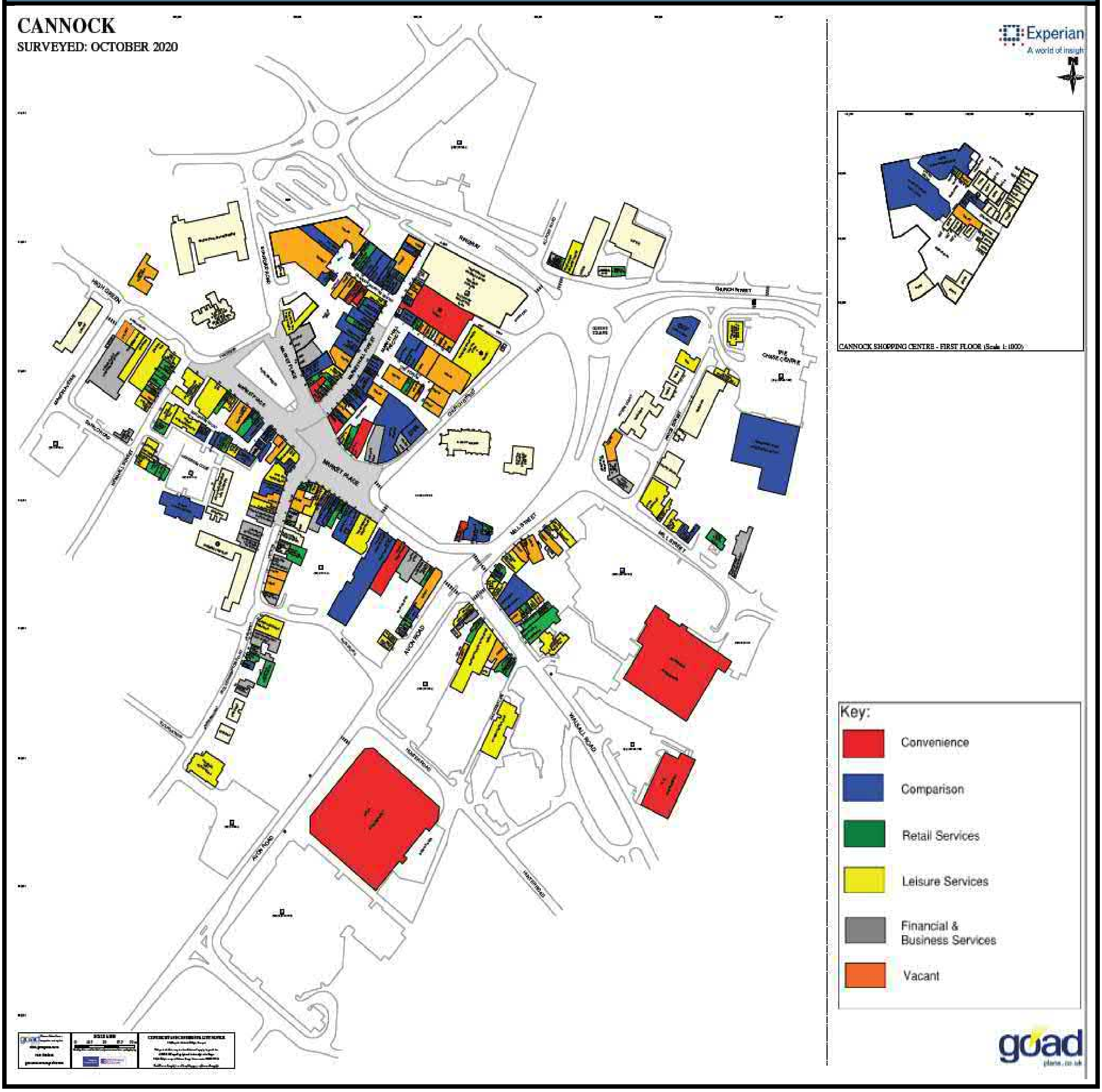
Photograph 3: Market Place Looking North

Photograph 4: Church Street, Looking South

Photograph 5: Passageway from Church Street to Market Hall Precinct

Photograph 6: St Luke & St Thomas Church

Diversity of Main City Centre Uses



Diversity of Main City Centre Uses

Figure 1: Units in Cannock (2015)

Category	No.	%	UK Av. %
Convenience	19	9	8
Comparison	63	28	33
Retail Service	36	16	14
Leisure Services	41	18	22
Financial and Business Services	37	17	11
Vacant	27	12	11
Total	**223**	**100**	**100**

Source: Experian

Figure 2: Floorspace in Cannock (2015)

Category	Sq.m	%	UK Av. %
Convenience	17,560	30	15
Comparison	18,030	31	36
Retail Service	2,780	5	7
Leisure Services	10,090	17	23
Financial and Business Services	6,280	11	8
Vacant	4,150	7	9
Total	**58,890**	**100**	**100**

Source: Experian

Figure 3: Units in Cannock (2020)

Category	No.	%	UK Av. %
Convenience	12	5	9
Comparison	58	24	29
Retail Service	50	21	15
Leisure Services	44	18	25
Financial and Business Services	29	12	10
Vacant	47	20	12
Total	**240**	**100**	**100**

Source: Experian

Figure 4: Floorspace in Cannock (2020)

Category	Sq.m	%	UK Av. %
Convenience	15,280	26	15
Comparison	16,680	28	33
Retail Service	4,130	7	7
Leisure Services	10,300	17	26
Financial and Business Services	4,850	8	7
Vacant	8,190	14	11
Total	**59,430**	**100**	**100**

Source: Experian

Diversity of Main City Centre Uses

We have undertaken our appraisal of Cannock Town Centre using Experian Goad surveys as the basis for our statistical analysis. The Goad survey area covers the retail core of the town centre. It should be noted that it does not cover the more peripheral areas outside of this where some of the other non-retail and leisure town centre uses are located.

Across the Goad survey area, there are a total of 240 retail, leisure and service units that occupy some 59,430sqm gross of floorspace. The number of units across the centre has increased by 17 since 2015 but the amount of floorspace has only increased by 540sqm during this time. In the absence of any meaningful new development in the town centre since 2015, these changes can mainly be attributed to the internal reconfiguration and subdivision of existing retail and commercial units.

Convenience Goods Units

The convenience goods offer in Cannock Town Centre is very good due to the presence of several large foodstores including Asda, Morrisons, and Aldi. Overall, there are presently 12 convenience retail units (5% of the total number) across the survey area occupying some 15,280sqm of floorspace (26% of the total). This is slightly down from the 19 units (8% of the total number) and 17,560sq m of floorspace (30% of the total) surveyed in 2015 due to the closure of several units in the Forum and Cannock Shopping Centre.

The current proportion of convenience retail units in the centre is below the UK average of 9%, but in floorspace terms it is far above the national average (of 15%) due to the presence of the aforementioned large foodstores. With the exception of Iceland, these large foodstores are located at the edges of the centre. In terms of convenience goods retailers present in the main shopping area, there are 3 bakeries, a Martin's convenience retailer, and a Holland & Barrett health food store. This offer is supplemented by a butcher within the covered markets, and market traders operating from open air market stalls in Market Place.

Comparison Goods Units

Comparison goods retailers occupy the highest number of units (58, or 24%) and the most amount of floorspace (16,680sq m, or 28%) across the town centre. Despite this, the comparison goods offer both in terms of units and floorspace occupied is below the national average (29% of units and 33% of floorspace) and the offer has contracted since 2015.

Our analysis has also established that 23 of the 58 comparison goods retailers are part of larger national chain retailers. Although independent retailers are important in bringing variety and distinctiveness to a centre, it is likely that the relative absence of some of the big-name retailers within the centre means that some shoppers go elsewhere. Since 2015, we note that several national retailers have vacated the town centre including Wilko, Bon Marche and Dorothy Perkins.

Turning to the size of comparison goods units, the largest are occupied by B&M (2,260sq m) and Home Bargains (1,860sq m). Peacocks (930sq m), Boots (910sq m), Poundland (830sq m) and Argos (710sq m) also operate relatively large stores, though we note that more than half of the comparison retailers (33 of 58) occupy small units of 130sq m or less. The smallest units are located along Market Hall Street and in Cannock Shopping Centre.

There is a reasonably diverse spread of comparison goods sold across the survey area including books and stationery, furniture, hardware & household goods and bicycles & accessories in addition to clothing and footwear retailers, gift shops and jewellers commonly found in town/city centres nationally.

There are 6 charity shop units across the survey area, 2.5% of the total number of units, which is broadly in line with the national average of 2.7%.

Retail Services

There are currently 50 retail service units in the town centre, an increase of 14 units since the last survey was undertaken in 2015. The proportion of retail service units in the centre exceeds the national average (21% vs the UK average of 15%) and is now in line with the average in floorspace terms (7%) having been below average in 2015. This increase is driven mainly by an increase in the number of hairdressers, beauty salons and tattooists over the past five years.

Of the 50 retail service units, 33 are occupied by health & beauty providers and in addition to these, there are 6 opticians and 3 travel agents. Other facilities include a dog grooming service, clothing repairs, a photo studio and vehicle repairs & servicing units. The retail service providers are generally located away from the pedestrianised shopping streets and in areas of lower footfall. We noted a particular concentration of hair salons, tattooists and barber shops along Newhall Street in the north west of the town centre, and in Kingston Court to the east.

Retail service providers generally occupy small units, with all but 4 in the town centre at 150 sqm or smaller. The largest units are Sanctuary beauty spa which occupies 380sqm of the White House at The Green, and Crayg Ward Hairdressing (370sq m) located at 17-18 Walsall Road.

Overall, the retail service offer has improved since 2015, and is considered to be at a reasonably good level for Cannock's size/catchment.

Leisure Services

As with the previous survey undertaken in 2015, the town centre remains underrepresented in terms of its leisure service provision with the proportion of units (18%) and floorspace (17%) significantly below the national average of 25% and 26% respectively. Whilst the leisure service offer has improved since 2015, the restaurant/food and drink offer serving the evening economy continues to be relatively limited and would benefit from improvement.

The town centre accommodates 13 fast food & takeaway units; 13 pubs, bars, nightclubs and social clubs; 7 cafes; 5 restaurants; 2 betting offices and an amusement/gaming arcade. In addition to these facilities is The Prince of Wales Theatre, located on Church Street, a small independent cinema on Walsall Road, and 'The Station' live music venue which is located on Stafford Road. These facilities are good for the evening economy and will help attract visitors to the town centre, however, at the time of our visits, they were temporarily closed due to the Coronavirus Pandemic.

Leisure units are distributed throughout the town centre, however there is a particular concentration at the north western end of Market Place, High Green and Newhall Street where there are several pubs, bars, restaurants and takeaways.

As identified by the Cannock Town Centre Partnership in their report, and within the Town Centre Development Prospectus, the redevelopment of the multi-storey car park of Church Street presents an opportunity to bring additional leisure uses into the town centre to complement the existing provision and provide a boost to the evening economy.

Financial and Business Services

Cannock Town Centre has a relatively good financial and business service offer which remains above average in terms of the proportion of units (12% vs the national average of 10%) and floorspace occupied (8% vs 7%). We note that the offer has reduced since 2015 with the loss of 8 units and 1,430sq m of floorspace, however this is generally in line with national trends. As would be expected in the largest centre in the District, Cannock has retained the majority of its banking services since 2015 though we note that TSB and the Yorkshire Bank have vacated the centre.

Of the 28 financial and service providers in the town centre, there are 10 estate agencies, 6 banks and building societies, 3 employment agencies, accountants, solicitors, financial advisors, and property maintenance firms. Aside from the banks and building societies which are located along Market Place, the majority of other service providers are generally located away from the main pedestrianised areas and we note a particular concentration of estate agencies along Wolverhampton Road.

Markets

A popular street market presently operates in Market Place on Tuesdays and Fridays each week with a mixture of stalls selling fresh food, household goods, flowers and local produce. Since the last survey was undertaken, the indoor stalls at the Market Hall have been vacated in order to facilitate its potential redevelopment as part of the wider planned redevelopment of Cannock Shopping Centre/The Forum.

Retailer Representation

National multiple retailers such as Marks & Spencer, Next and TK Maxx can act as anchor tenants in a centre, adding to its appeal and creating additional pedestrian footfall. Experian Goad produces a list of the top retailers which act as a measure of the vitality and viability of a centre and of the 31 major retailers within the Experian list, Cannock Town Centre only hosts seven: Argos, Boots, Clarks, EE, New look, Vodafone and WH Smith.

Other national multiple retailers present in the town centre include Poundland/Pep & Co, Shoezone, Card Factory, B&M Home Store, JD Sports, Bodycare, and Game. We note that many of these are value propositions at the lower end of the market and target a certain demographic. Since 2015, we note that several national retailers have vacated the town centre including Wilko, Bon Marche and Dorothy Perkins. It is evident that strong mid-range or higher quality national multiple retailers are absent from the town centre. Given the current economic climate and the growing list of multiple retailers going into administration it is difficult to envisage how the town centre could address this deficiency/weakness.

Balance of Independent and Multiple Operators

Our analysis has established that 52 of the 149 (34%) occupied units, (excluding leisure) in the town centre are operated by national multiple operators. This is broadly in line with the national average of 36%. The sector with the highest representation of independent operators is retail services with 6 out of 44 (13%) units operated by national multiples. As referenced above, we consider there to be a relative lack of 'big name' retailers within Cannock Town Centre and whilst the introduction of these operators would benefit the town centre, given the current economic climate, we would recommend that any future town centre strategy focusses on developing and enhancing its independent offering.

Other Town Centre Uses

In addition to retail, commercial and leisure units, a range of complementary uses can help to support the vitality of town centres by attracting visitors and driving footfall. Though mainly located towards the edge, or outside of the main shopping area, Cannock Town Centre accommodates several other commercial uses, educational facilities, public services, places of worship, and healthcare services:

Cannock Chase Hospital is situated to the north of the main shopping area, off Stafford Road and Brunswick Road. The hospital is operated by The Royal Wolverhampton Hospital Trust and has a minor injuries unit as well as a compliment of inpatient and outpatient departments and services; **Cannock Library** is located to the west of the town centre at the top of High Green, a short walk from the pedestrianised shopping area. As well as providing book loans and study spaces, it also hosts regular children's & baby groups, 'knit & natter' sessions and other community sessions. The central **Police Station** is situated just off the pedestrianised Market Place on Wolverhampton Road; and **Cannock College,** a campus of South Staffordshire College is located centrally within the Town Centre just opposite the bus station on Stafford Road. In terms of places of worship, there are several churches and religious institutions including the centrally located St Luke & St Thomas Church off Church Street, Cannock United Reformed Church on Park Road, and Cannock Christadelphian Hall on Price Street at the eastern edge of the town centre.

Despite the additional uses set out above, we note there is a lack of office space within the town centre and no serviced accommodation or hotel space either. These uses are particularly important in driving footfall in town centres during weekdays. Though the long-term effects of Covid-19 on the office market are currently unclear, the redevelopment of the multi-storey carpark as envisioned within the Development Prospectus document (Site A), the Bus Station (site B) or Beecroft Road Car Park (Site C) presents the opportunity to accommodate such development.

Residential uses can also enhance the vitality to town centres through bringing activity throughout the day and helping to sustain small businesses. Due to the compact nature of Cannock and the low-rise built form, there are few residential uses in the upper floors of retail/commercial units. The surrounding areas to the centre are characterised though by suburban residential development meaning that the centre is a walkable distance from a good number of potential visitors.

Barriers to Business

Whilst there are high numbers of vacant units in the town centre, many of these are in areas which may be redeveloped in the short to medium term. This, coupled with the poor condition of some of the vacant units may represent a financial barrier for new businesses with the investment required not seen as viable.

Structural changes in the retail sector alongside the ongoing covid-19 pandemic also represent a key issue for the town centre. Given the proximity of the town centre to higher order centres in the region (Stafford, Walsall and Birmingham) and the soon to be opened West Midlands Designer Outlet nearby, demand from more established retailers to the town centre may be affected which in turn may affect its attractiveness as a place to visit amongst residents within Cannock Town Centre's catchment area.

Operator Requirements

In assessing the health of centres, it is also relevant to consider which retailer/leisure operators may be intending to seek representation in Cannock in the future. 'The Requirements List' sets out requirements for additional floorspace in particular town/city centres. As of November 2020, a total of 12 retail and commercial leisure operators are currently seeking premises in the town centre. Despite the present economic climate therefore, there is still some demand from operators seeking premises in the town centre.

Operator	Min Size (sq m)	Max Size (sq m)		Operator	Min Size (sq m)	Max Size (sq m)
Retail/Services						
The Fragrance Shop	20	140		Lidl	1,300	2,470
Aldi	1,500 (min)			British Heart Foundation	75	140
The Perfume Shop	50	100		Super Cuts	55	70
Leisure – Food & Drink						
Starbucks (Café Fortune)	170			Amber Taverns	185 (min)	
Innkeeper's Lodge	(not specified)			Miller & Carter	280	560
Leisure - Other						
JD Gyms	1,100	2,800		Monkey Puzzle Nurseries	185	560

It should be noted that each retailer/leisure operator will have particular size, layout and format requirements and that some operators may not have specifically identified town/city centre representation, instead targeting regions or even nationwide expansion. Whilst 'The Requirements List' principally records the requirements of high street multiple operators, it is of relevance in identifying the type and broad number of operators currently seeking representation.

Opening Hours/Night-time Economy Offer

A number of operators in Cannock Town Centre operate at different hours. Within the main shopping core, the majority of retailers operate between the hours of 8.30am – 6pm, however retailers outside of this operate extended opening hours which help to ensure activity is maintained throughout the day. Morrisons for example operates from 7.00am – 9.00pm daily, and Asda operates from 6.00am – midnight on weekdays, 6.00am to 10.00pm on Saturdays, and 10.00am – 4.00pm on Sundays.

Leisure service providers in the town centre open during later hours (generally until midnight) which again helps to bring activity and vitality to the town centre after normal business hours. The presence of the theatre and cinema are valuable assets to Cannock and will attract visitors to the town centre, however the evening economy could be boosted by additional leisure development including new food and drink provision and a new cinema complex as identified in the redevelopment of Site A, Church Street in the Town Centre Development Prospectus.

Vacancies

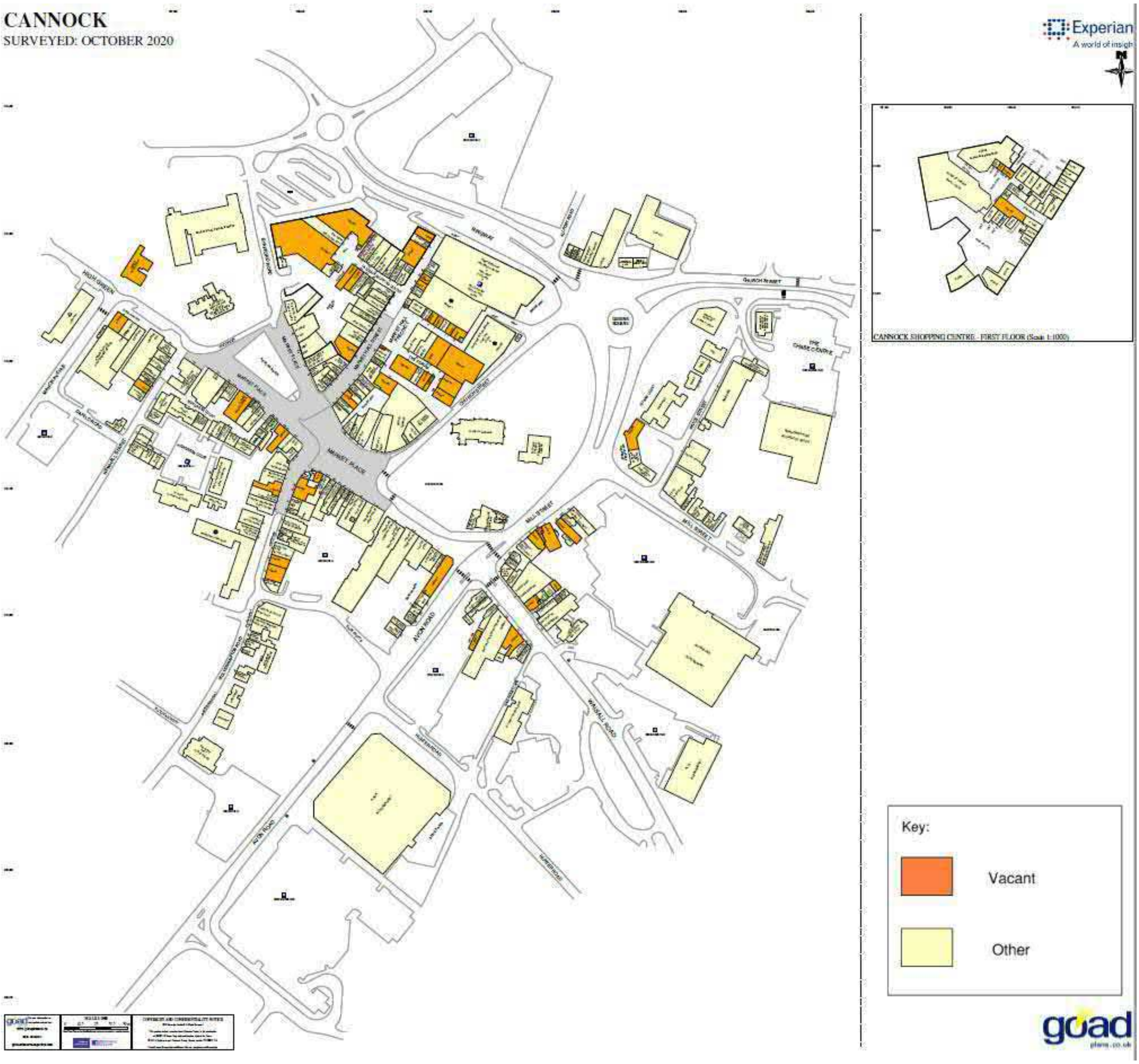
There is a total of 47 vacant units across Cannock Town Centre, accounting for 20% of all units which is significantly higher than the national average of 12%. The vacant units occupy 8,190sq m of floorspace, 14% of the total floorspace across the centre and again, higher than the national average of 10%. When compared with 2015, the vacancy rate is shown to have increased from 27 units (12% of the total) and 4,150sq m of floorspace (7%).

While vacant units can be found across the town centre, there are concentrations within The Forum shopping arcade, where 7 of the 10 units are currently empty, within the indoor portion of Cannock Shopping Centre, and on Mill Street to the east of the main shopping area. The vacant units, particularly within The Forum and Cannock Shopping Centre detract from the vitality and viability of this part of the centre with some requiring maintenance, and others appearing scruffy within the streetscape. We understand from the Council that some of the vacancies, especially around Cannock Shopping Centre have resulted from aspirations of redeveloping this part of the town centre.

In the short term, it is likely that vacancy rates will increase across Cannock due to the impacts of the Coronavirus pandemic. Several retailers currently present within the town centre such as Argos and Peacocks have recently announced a programme of store closures, while the impacts of restrictive operating requirements brought about by the need for social distancing will impact on the viability of some leisure and hospitality businesses.

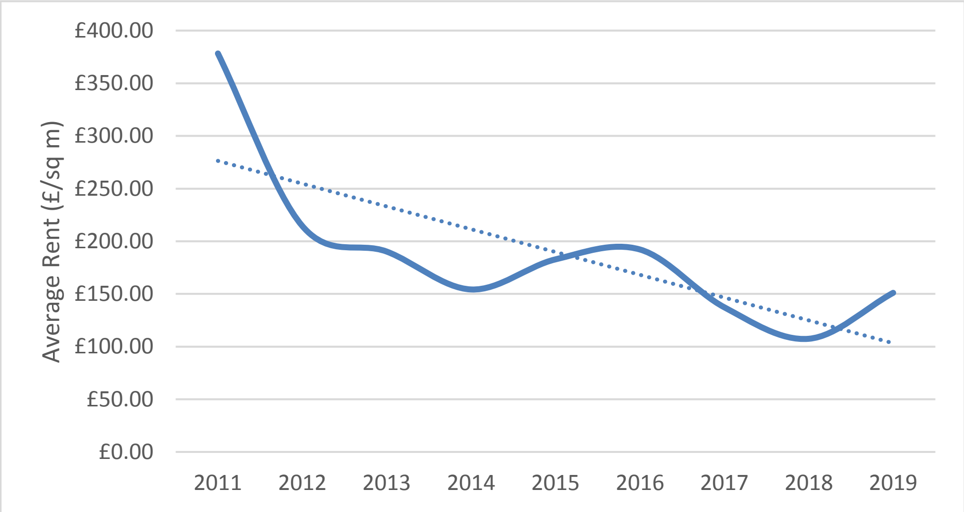
Aspirations for redevelopment works in the town centre provide an opportunity to modernise and breathe new life into the town. Should proposals come forward, they would improve the attractiveness of the town centre, drive footfall and would help to improve the marketability of vacant units.

Vacancies


CANNOCK
SURVEYED: OCTOBER 2020
Experian
A world of insight
CANNOCK SHOPPING CENTRE - FIRST FLOOR (Scale 1:1000)
Key:
Vacant
Other
goad

Rents on Non-Domestic Property

Historic rental data has been obtained from EGi which we have used to calculate average rental prices (per sq. m) of commercial property across Cannock Town Centre. The data indicates a general downward trend in the rents commended, which accords with trends observed nationally. Rental data taken from over 60 leases signed over the past 10 years indicates that rents were highest in 2011 with occupiers being charged an average of £378.30 p/sq m per annum while prices were at their lowest in 2018 at an average of £107.43 p/sqm.



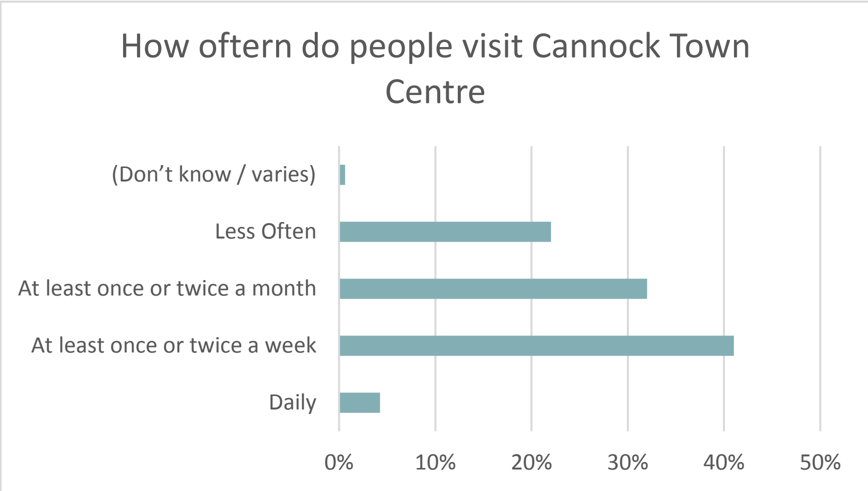
A review of online sources indicates that there is a range commercial property currently to let in the town centre. Data available indicates that rents vary, ranging from £25 to £236 p/sqm per annum within units on Market Place.

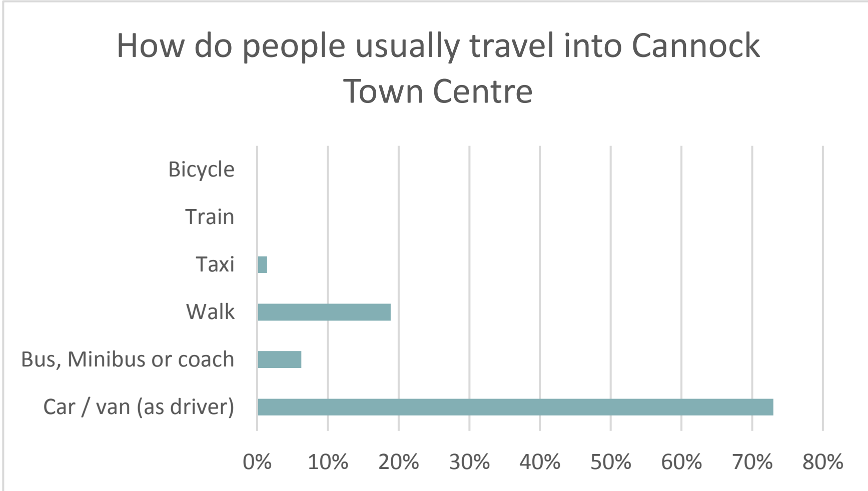
As is to be expected, rents are generally cheaper towards the edges of the town centre, while those located on the pedestrianised areas with higher footfall command higher rents.

When compared to other retail destinations in nearby centres, rents in Cannock are generally lower. Data from available properties in Walsall suggests the average price per sq/m per annum is around £180, while in Stafford it is £155 and in Lichfield, it is much higher at over £400.

Customers' Views and Behaviour

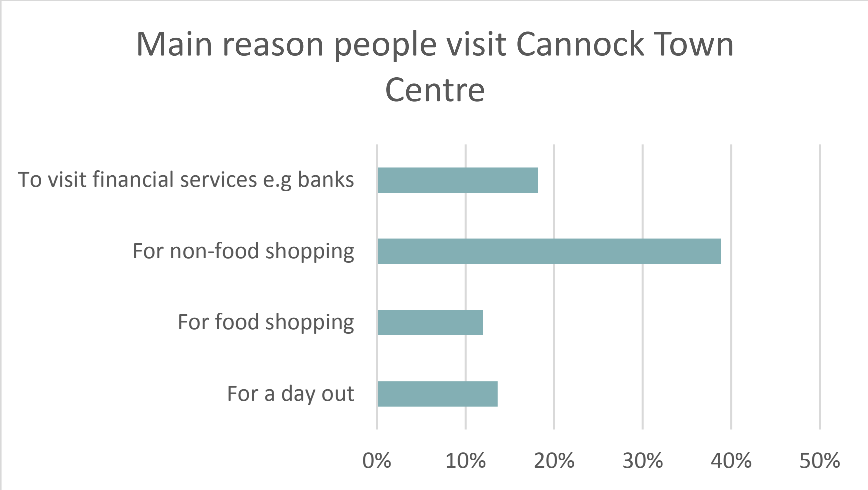
Using data from the NEMS household survey, we have been able to identify the views and behaviour of visitors to the town centre and understand the reasons why respondents visit Cannock, what they like about it, and what, if anything would encourage them to visit more often.

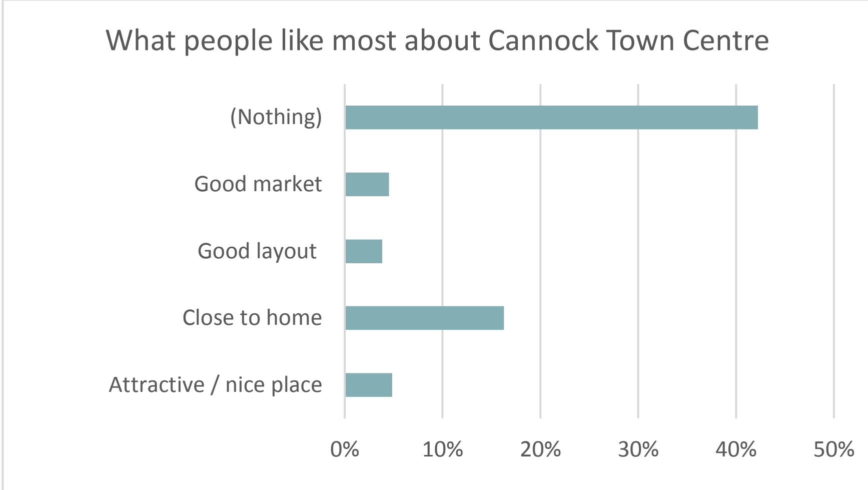




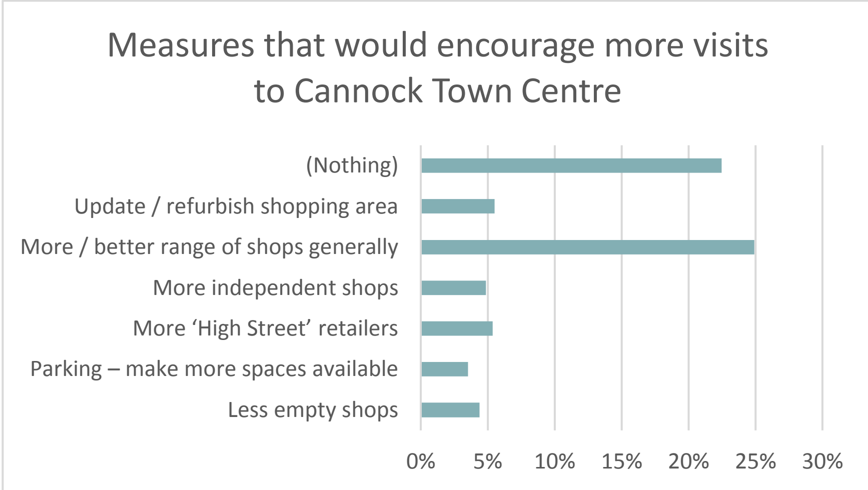
Of those who visit Cannock Town Centre, 4% visit on a daily basis, 41% visit at least once or twice a week, 32% visit at least once or twice a month, and 22% visit less often. The vast majority (73%) travel into the town centre by car or van, 19% walk into the centre, and 6% travel in by bus, minibus or coach. Less than 1% of people indicated that they cycled into Cannock Town Centre.

When asked for the main reason why they visit the town centre, non-food shopping was the most common answer from respondents (39%), followed by visiting financial services (18%), for a day out/a walk/to window shop (14%) and for food shopping (12%). Other reasons for visiting included to visit a medical service (5%), for work (4%), and to visit bar or pubs, to shop at the market, and to meet friends and/or family (all 1%).





When asked about what they most liked about Cannock Town Centre, the most common answer from respondents was 'nothing' (42%). This is notably higher than those with the same answer when asked about Rugeley or Hednesford and it indicates a general level of dissatisfaction from visitors about the town centre. 16% of respondents said that they liked the town centre as it was close to home, 5% said it had a good market, 5% said it was attractive or a nice place, and 4% said it had a good layout.



When asked about what would encourage them to visit the town centre more often, 25% said that more or a generally better range of shops would do so, 5% said there should be more 'high-street retailers', 5% said there should be more independent shops, 4% said they would like to see more parking spaces available and 4% said they would like to see less empty shops. 22% of respondents indicated that nothing would encourage them to visit the town centre more often, indicating they are either satisfied with it, or that they visit the centre enough already.

Pedestrian Flows

During our visits reasonable levels of pedestrian activity were observed within the pedestrianised Market Place and Market Hall Street. The outdoor markets clearly encouraged footfall in these areas. Pedestrian footfall was also observed from the bus station to the centre along Stafford Road, and similarly, activity levels along Wolverhampton Road to the south of the main shopping area were observed.

Pedestrian activity outside of these areas was more variable, and it was clear that social distancing restrictions and the changed working practices brought about by the coronavirus pandemic had some effect. This was apparent around High Green Court and Newhall Street where there are several pubs, bars, restaurants and takeaways which were observed to be quiet. Church Street and the walkway through to Market Hall Precinct by the Forum were also observed to be particularly quiet and had considerably lower levels of activity than other areas. This area has a high number of vacancies and the lack of active frontages coupled with the generally poor environmental quality contribute to a sense of emptiness here. Pedestrian footfall also dropped off to the south east of the town centre on Walsall Road. The busy Avon Road acts as a barrier from the main shopping area here with the traffic impeding pedestrian flows across the road.

Accessibility

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

Road Access

Cannock Town Centre is well connected by road to the surrounding area by virtue of its proximity to the strategic highway network. The nearby M6 and M6 toll motorways provide nearby connections with the M5 and M42 to destinations further afield, while the network of A roads in the area provide more local connections to Wolverhampton, Lichfield, Stafford and Walsall.

Turning to the road network in and around the town centre, the pedestrianised areas around Market Place and Market Hall Street prevent direct vehicle access to much of the retail core. This pedestrianisation is combined with other vehicle restrictions meaning that those travelling to Cannock are encouraged to use one of several car parks on the periphery of the town centre, or to use alternative means of travel.

We noted that the roads surrounding the town centre, particularly the A4601/Avon Road/Ringway were busy during our visits with a constant flow of traffic. This road provides an important connection to the M6 and M6 toll motorways to the south, and to Stafford via the A34 to the north. It however acts as a physical barrier for pedestrian movement.

Car Parking

There are numerous car parks around the periphery of the town centre providing a parking for those visiting Cannock. The Council operate several of these, including:

- Avon Road (106 spaces)
- Backcrofts (44 Spaces)
- Beecroft Road (215 Spaces)
- Front and Side of Council Civic Offices (52 spaces)
- Rear of Council Civic Offices (130 spaces)
- Railway Station, Girton Road (90 spaces)
- Danilo Road (54 Spaces)

In addition to these car parks, some on-street parking is available on adjacent roads to the centre and the Morrisons and Asda foodstore both have large car parks offering 2-hour limited free parking. The large 500 space multi-storey car above Market Hall and Cannock Shopping Centre has been closed since 2018 due to structural issues and health & safety concerns, and it is unclear whether this car park will re-open again in the near future.

Whilst we consider the overall parking provision in Cannock to be adequate, some of the businesses contacted suggested they were concerned that the loss of the Market Hall car park may increase pressure on other car parks during busy periods potentially deterring some visitors. This situation will need to be monitored to ensure that this is not the case.

Public Transport

Cannock has a railway station, though it is located just outside of the town centre approximately 1km from the main shopping area. The station provides services to Birmingham New Street Station and Rugeley Trent Valley and onward connections to the wider national rail network. There is presently not a clear pedestrian route from the town centre to the station and it isn't very well signposted and improvements could clearly be made in this regard.

Busses operate from a bus station adjacent to Cannock Shopping Centre and there are several stops located on streets leading from the centre too. The bus station facilities appear to be in reasonable condition, and there are 5 bus stands each with its own shelter. The bus station is served by over 30 regular services to surrounding area, as well as national services provided by National Express.

Walking, Cycling and Disabled Access

Access for pedestrians within the core shopping area is generally good, owing to its compact size and generally flat topography. Much of Market Place, and all of Market Hall Street is fully pedestrianised and easy to navigate, though during periods when the street market is being held it can become crowded. There are canopies over large extents of shop frontages at Market Hall Street, Stafford Road and the High Green Court shopping arcade. These, together with the indoor shopping facilities at Cannock Shopping Centre provide shelter for shoppers at times of bad weather.

Pedestrian access to the core shopping area from other parts of the town centre, particularly from the north and east is impeded by the busy road network along The Ringway, the Queens Square Roundabout and Avon Street/Mill Street. These roads act as a barrier and effectively cut the shopping core of the town centre off for pedestrians as there are few crossing points. Units at the Chase Centre to the east of the main shopping core are separated by Queen Square roundabout which inhibits pedestrian connectivity, giving the area the feeling of a retail park rather than a composite part of the main town centre.

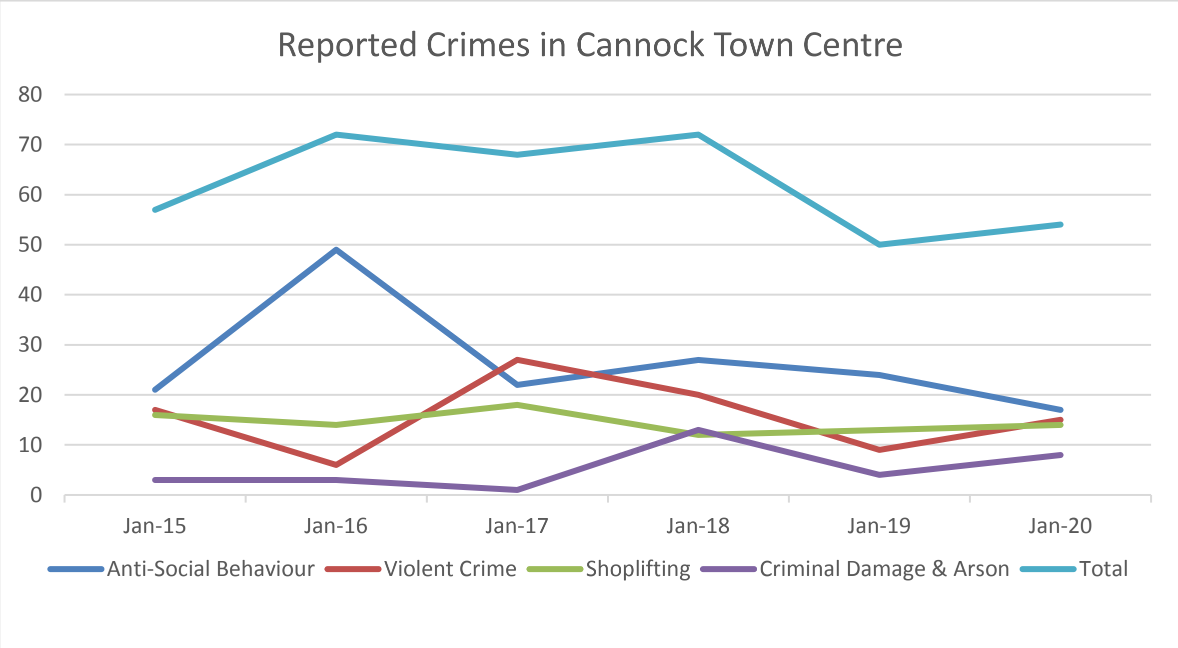
In terms of access for cyclists, we noted that cycling is prohibited in the pedestrianised areas of the town centre though cycle parking was provided in several locations. Cannock is not located on any national cycling routes and there are very few dedicated cycling lanes within the town centre itself. Along with the busy local road network, this may act as a deterrent for cyclists. This is borne out by responses to the household survey where less than 1% indicated that they cycled to the town centre and this is again clearly an area where accessibility can be improved.

The town centre is considered to be generally good in terms of accessibility for the disabled and those with mobility problems, though the aforementioned busy road network with limited crossing points may impede access somewhat. At the time of our visits we noted that the escalators within Cannock Shopping Centre were out of action limiting access to the units at first floor level. In all Council operated car parks, free car parking is available for blue badge holders.

Perception of Safety and Occurrence of Crime

Most areas of Cannock Town Centre during daytime hours, particularly the core shopping area, felt safe by virtue of good footfall and with good levels of natural surveillance from active frontages. More peripheral areas of the town centre, such as Backcrofts have few active frontages and at night or in quieter parts of the day may feel isolated. Similarly, the walkway at The Forum off Church Street has very little footfall and there is evidence of vandalism and graffiti. The underpasses beneath the Ringway also lacked natural surveillance which impacts on perception of safety.

CCTV cameras were observed in town centre at Cannock Shopping Centre, Market Place and at Backcrofts car park. We understand that in 2018 over £55,000 was invested into upgrading CCTV systems by the Council.



Cannock Town Centre benefits from being part of the Cannock Rugeley and Hednesford Business Crime Reduction Partnership which has been accredited by Partnerships Against Business Crime in Staffordshire (PABCIS). These organisations work together to prevent town centre crime and disorder by sharing information with police and other partners

A study of crime statistics (ukcrimestats.com) indicates that reports of four common 'town centre' crimes in a given month over the past 5 years have varied, though have decreased slightly.

In January 2015 there were 57 reports of anti-social behaviour, violent crime, shoplifting, and criminal damage & arson. In January 2016 and 2018, reports of these crimes had increased to 72, however they have since fallen to 50 incidences in January 2019 and 50 in January 2020.

Town Centre Environmental Quality

We found the environmental quality of Cannock Town Centre is varied. Some areas are attractive and provide a good quality environment for visitors, while others are clearly in need of considerable investment.

The pedestrianised areas of Market Place and the southern portion of Market Hall Street have a generally attractive built form with a mixture of architectural styles. Shopfronts in this area are well maintained and the pedestrianised streets are clean and tidy. The street furniture also works well and is co-ordinated in a black and gold colour-scheme to match the other centres in the district. Together with a central war memorial and public art pieces, they create an attractive and distinctive environment.

The town centre benefits from three areas of green space; the churchyard surrounding St Luke and St Thomas Church on Church Street, a bowling green at the north of Market Place, and Backcrofts Park which away from the main shopping area. These areas provide attractive areas for relaxation and help to break up the built form, though the park at Backcrofts would benefit from being better connected to the shopping areas as it is presently not well linked. In addition to the green spaces, seasonal planting is used to good effect, especially around the central clock tower in Market Place, around the war memorial and next to the bowling green. Trees planted at intervals along Market Place are also attractive, helping to break up the hard paving and providing shade during the summer months.

The busy road network in the town centre detracts from the quality of the environment due to the amount of traffic that passes through. As well as impeding pedestrian movement, particularly from the north and east to the main shopping area, it creates noise and affects the air quality of surrounding areas. The underpasses beneath the busy roads also present areas that need improvement as they are key gateways into the centre do much to create an impression of the town for visitors.

The wider Cannock Shopping Centre site which includes the Prince of Wales Theatre, Market Hall, The Forum and the now closed multi-storey car park significantly detracts quality of the rest of the town centre. The passageway leading from Church Street to Market Hall Place is especially run down and feels dark and unwelcoming with evidence of graffiti and vandalism. Similarly, on our visits, Cannock Shopping Centre felt very tired with multiple vacant and empty shopfronts. The aspired redevelopment of this area is long overdue and will help to improve the environmental quality of the town centre considerably.

Overall, we consider the town centre environment to be varied, with investment clearly needed in key areas. Our assessment is supported by the findings of the household survey where respondents indicated that an updated or refurbished shopping area would make them visit the town centre more often, and from the business survey where more than half of the respondents indicated that they considered the attractiveness of the town centre public realm to be poor.

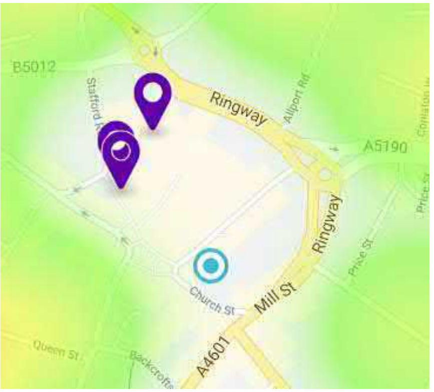
Photograph 7: Ramp to the closed multi-storey car park

Photograph 8: Derelict building in poor repair along Price Street

Photograph 9: Vacant unit outside Cannock Shopping Centre

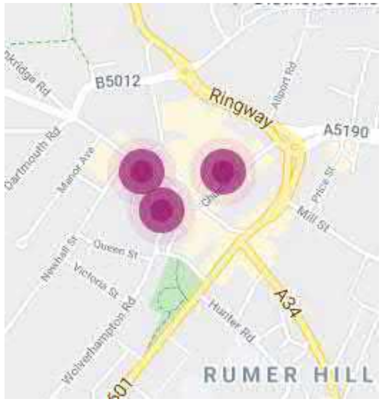
Digital Facilities in Cannock Town Centre

BT Wi-Fi Hotspots



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

Sky Cloud Wi-Fi Hotspots

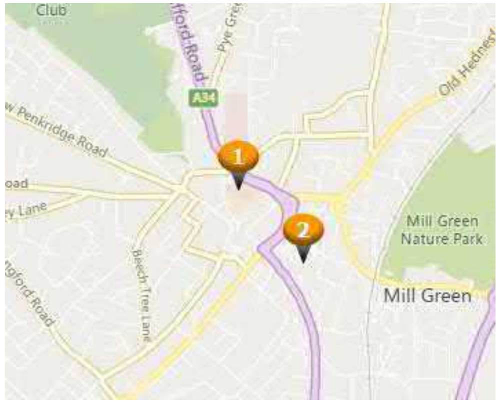


Source: www.thecloud.net/free-wifi/find-a-hotspot/

Collect+ Locations

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

Amazon Locker Locations



Source: amazon.co.uk

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

There are 3 BT hotspots and 3 Sky Cloud hotspots that provide some free-Wi-Fi, though these are provided by retailers and their coverage is likely to be limited. We understand that the Council is considering rolling out Wi-Fi covering across the town centre which would be considered beneficial, though a timescale for this has not been provided.

There are also currently 2 Collect+ locations and 2 Amazon Locker locations in the town centre, one in Cannock Shopping Centre, and one at Morrisons on Mill Street. For the size of the centre, we consider Cannock to be reasonably well served.

Conclusions

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

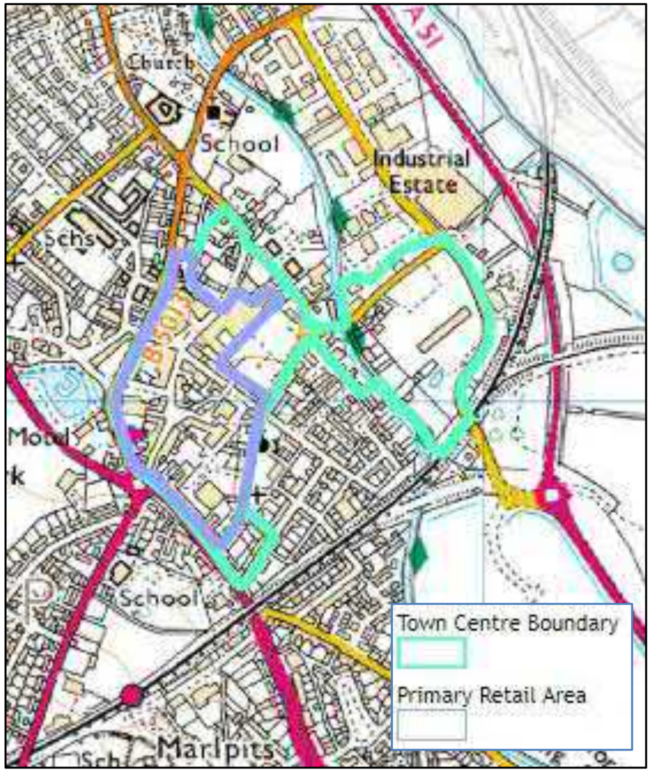
Strengths and Opportunities

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

- High level of vacancies 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 budget options
- Opening of Mill Green Outlet Centre may affect the desirability of town centre space for operators and potentially lead to closures in the current economic climate
- 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

Rugeley Town Centre Health Check Appraisal



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. The town centre, as designated within the 2014 Policies Map is bound by the A460 Horse Fair to the south, Elmore Lane to the west, St Pauls Road/Lichfield Street/Forge Road to the east and by Bryans Lane to the north. The town centre also extends around the large Tesco store and car park off Power Station Road, which opened in 2013.

The Primary Retail Area as defined on the Policies Map extends across the majority of the Town Centre but excludes land off Bryans Street and Market Street in the north east of the defined centre, and also the Tesco store on Power Station Road. Most of the main shopping streets across the centre are pedestrianised which creates two public open spaces at Brook Square and Market Square. The centre accommodates 2 small covered markets off Brook Square and Brewery Street and several convenience foodstores including an Iceland frozen foodstore and Morrisons Supermarket off Market Street in the Primary Retail Area, and the aforementioned Tesco store in the far north of the town centre. There is an Aldi store located just off market street to the north west. The discount foodstore falls just outside the defined town centre boundary.

Photographs of Rugeley Town Centre

Photograph 1: The Plaza public house on Horse Fair

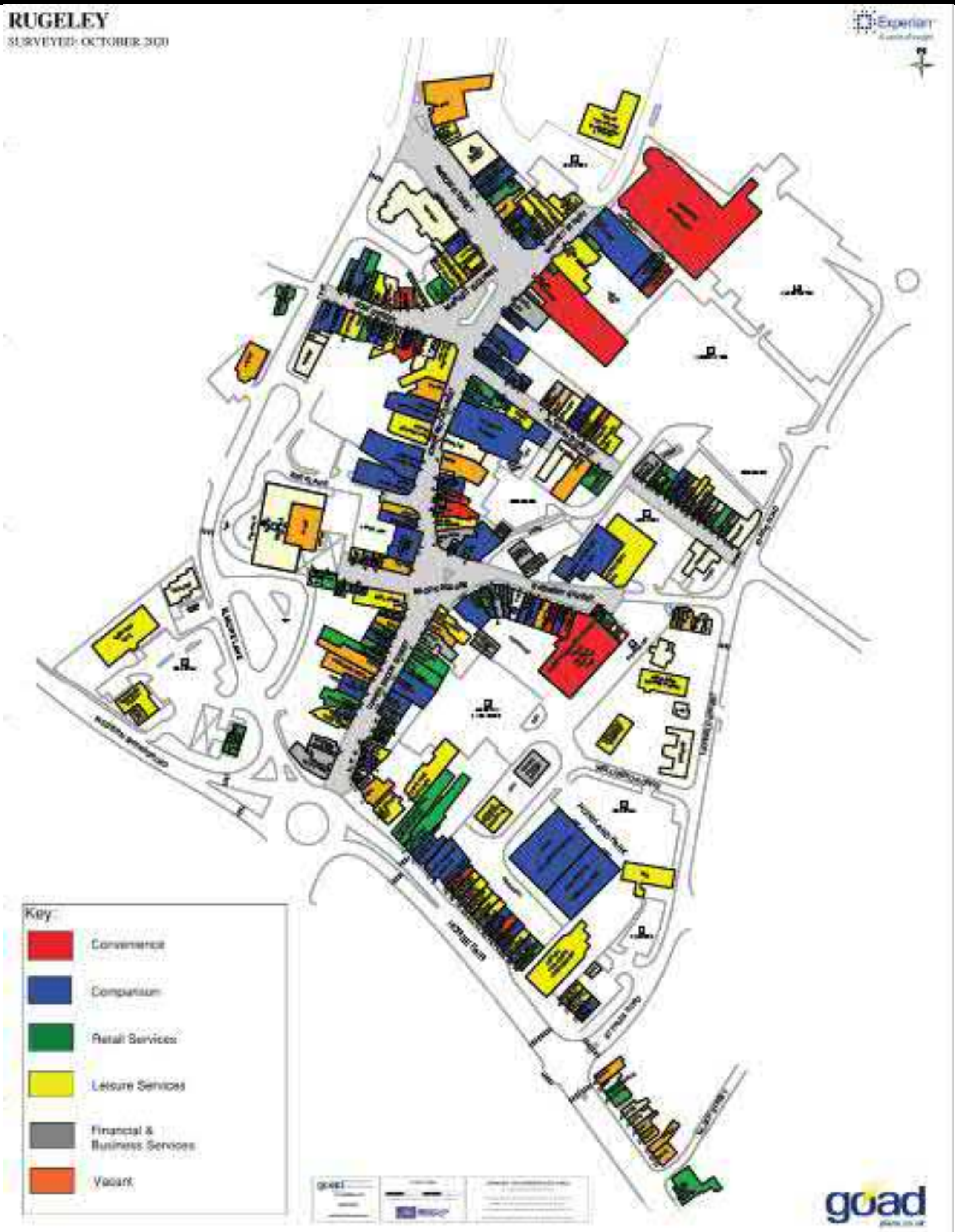
Photograph 2: Upper brook Street looking south


Photograph 3: Albion Street

Photograph 4: Brook Square


Photograph 5: Anson Street looking north

Diversity of Main City Centre Uses



Diversity of Main City Centre Uses

Figure 1: Units in Rugeley (2015)

Category	No.	%	UK Av. %
Convenience	19	10	8
Comparison	63	32	33
Retail Service	38	19	14
Leisure Services	43	22	22
Financial and Business Services	20	10	11
Vacant	16	8	11
Total	**199**	**100**	**100**

Source: Experian

Figure 2: Floorspace in Rugeley (2015)

Category	Sq.m	%	UK Av. %
Convenience	6,060	18	15
Comparison	11,620	34	36
Retail Service	3,310	10	7
Leisure Services	7,030	21	23
Financial and Business Services	2,840	8	8
Vacant	2,960	9	9
Total	**33,820**	**100**	**100**

Source: Experian

Figure 3: Units in Rugeley (2020)

Category	No.	%	UK Av. %
Convenience	18	9	9
Comparison	52	26	29
Retail Service	39	20	15
Leisure Services	50	25	25
Financial and Business Services	17	9	10
Vacant	22	11	12
Total	**198**	**100**	**100**

Source: Experian

Figure 4: Floorspace in Rugeley (2020)

Category	Sq.m	%	UK Av. %
Convenience	6,520	20	15
Comparison	9,560	29	35
Retail Service	3,670	11	7
Leisure Services	8,090	25	25
Financial and Business Services	1,720	5	8
Vacant	3,310	10	10
Total	**32,870**	**100**	**100**

Source: Experian

Diversity of Main Town Centre Uses

Our appraisal of Rugeley Town Centre has been undertaken using Experian Goad surveys as the basis for our statistical analysis. The Goad survey area covers the defined Primary Retail Area of the town centre but excludes the Tesco store located off Power Station Road.

Across the Goad survey area, there are a total of 198 retail, leisure and service units that occupy some 32,870sqm gross of floorspace. When compared with 2015, the number of units and floorspace across the centre has slightly decreased. In the absence of any meaningful development since this time though, the changes can mainly be attributed to the internal reconfiguration and subdivision of existing retail and commercial units.

Convenience Goods Units

The convenience goods offer in Rugeley is good for the size of the town centre with Morrisons and Iceland stores located within the Primary Retail Area and Tesco just outside. In total, there are 18 convenience goods units across the Goad survey area, accounting for 9% of the total number of units, and 6,520sqm convenience floorspace, 20% of the total. The proportion of convenience retail units across the survey area is in line with the UK average of 9% but exceeds the average (of 15%) in floorspace terms primarily due to the large size of the Morrisons store.

In addition to the aforementioned large foodstores, the centre also accommodates 5 bakers & confectioners, 2 tobacconists, 2 shoe repairs & key cutting services, an off licence, a greengrocer, and a health foods shop. There are also several smaller convenience retailers trading from the small units within Brewery Street Shopping Centre & Market.

Comparison Goods Units

There are 52 units across the town centre occupied by comparison retailers (26% of the total) which occupy 9,560sq m of floorspace (29% of the total). When compared with 2015, the offer has contracted with 11 fewer units and 2,060sq m less floorspace. Whereas the provision was broadly in line with the national average in 2015, it is now below the national average of 29% of units and 33% of floorspace. Most of the vacated comparison units since 2015 were occupied by local/independent retailers but we note that national multiples Shoezone and Clinton Cards have closed.

The largest comparison goods units in the town centre are occupied by Argos (960sq m), Peacocks (850sq m) and Home Bargains (730sq m), and there are 11 other units accommodating 200sq m or more, including Wilko (620sq m), New look (270sq m), Boots (270sq m) and WH Smith (240sq m). The majority of the units in the town centre are small in size with 26 at 100sq m or less.

Turning to the goods sold, for its size there are is a reasonable range available in the centre including 4 units each dedicated to textiles & soft furnishings, flowers, electrical & other durable goods, and crafts, gifts, china & glass. There are 8 clothes & footwear retailers, and 6 charity shops in addition to other comparison goods retailers. National multiple comparison goods retailers in Rugeley include WH Smith, New look, Boots, Wilko, Card Factory, Hallmark, Peacocks, Home Bargains, Argos, and Savers.

Retail Services

There are 39 retail service units across the town centre, a slight increase since the last survey was undertaken in 2015. The retail service offer in the town centre exceeds the national average both in terms of units occupied (20% vs the UK average of 15%), and by floorspace (11% vs 7% UK average). The majority of the retail service providers in the town centre fall within the 'health & beauty category', 15 units are occupied by hairdressers and 5 units by beauty and nail salons. Other retail providers across the centre include 4 opticians, a laundrette, dry cleaning services, an undertakers, and a dog grooming service. Though retail service providers are found across the town centre there are concentrations along Upper Brook Street (10 units) and along Albion Street (7 units).

Overall, we consider the retail service provision in Rugeley to be commensurate to the centres' size and role.

Leisure Services

As with the previous survey undertaken in 2015, the leisure service offering in the town centre remains in line with the national average. There are 50 leisure service providers across the town centre which occupy 8,090sqm, this provision equates to 25% each of the total number of units and floorspace.

In line with national trends, the leisure service offering has expanded over the last five years with, the number of units increasing by 7. The town centre now accommodates a high number (19) of fast food & takeaway units, 9 public houses, bars & wine bars, 7 restaurants, 4 cafes, 2 betting offices, 5 sports & leisure facilities including sports clubs and gyms, and an amusement arcade. The centre also accommodates a hotel/guesthouse located off Horse Fair in the south of the town centre, and we note there is a large Travel Lodge just outside of the town centre boundary to the west, off Western Springs Road.

The leisure units are mainly distributed to the outer edges of the town centre, though there are several pubic houses, cafes and sandwich shops on the main shopping streets. We note a particular concentration of 9 fast food & takeaway units are found along Horsefair where 'The Plaza', a large JD Wetherspoon public house is also located. Overall, we consider the leisure service provision in Rugeley to adequately meet the needs of the town.

Financial and Business Services

The financial and business service provision in Rugeley Town Centre consists of 17 units (9% of the total) which provide banking, estate agency, legal and property services. The proportion of units and floorspace across the town centre given over to financial and business services is slightly below the national average (10% of units and 7% of floorspace) and when compared with the 2015. The banking provision in the town centre has seen a notable weakening following the closure of branches of HSBC, Natwest and Barclays banks.

Markets

A street market operates in Market Square on Tuesdays, Thursdays and Saturdays with a variety of stalls selling food, household goods and local produce. There are also indoor market stalls within Market Hall at the western end of Brook Square and units within the Brewery Street Shopping Centre. At the time of our visits, the Market Hall was mostly vacant with only a few traders present.

Retailer Representation

National multiple retailers can act as anchor tenants in a centre which can in turn drive pedestrian footfall. Experian Goad produces a list of 31 top retailers which can act as a measure of the vitality and viability of a centre. Of those on the list, Rugeley Town Centre has six, Argos, Boots, WH Smith, Wilko, Tesco and New Look. Considering the size of the centre, this represents a good range and we note the presence of other retailers such as B&M Bargains, Savers, Thorntons and Specsavers which may also help attract visitors to the centre.

Balance of Independent and Multiple Operators

Excluding leisure units, 29 of the 126 occupied retail and commercial units in the town centre are occupied by national and multiple operators. This equates to 23% which is lower than the national average where around 36% of units are filled by national and multiple operators. Despite the lower than average proportion of multiples, we consider the number of independent traders across the town centre as a positive as it contributes to the character and individual offer of Rugeley.

Other Uses

Due to the size and compact nature of the town centre, there are relatively few other uses within the defined centre boundaries. Those inside the centre include Rugeley Library on Anson Street, a Citizens Advice Bureau on Brewery Street, and a veterinary surgery on Albion Street, while on the outskirts of the centre is a fire station at the top of Market Street and a police station on Anson Street. There are also several residential properties within, or adjacent to the town centre which bring activity into the centre after core business hours and provide a core customer base to businesses. These include residences along Elmore Lane to the west of the town centre, housing along the north of Market Street, and collections of housing along Lichfield Street and Forge Road to the east.

In terms of churches and other religious institutions, one of the units along Upper Brook Street is occupied by a Christian Ministries while there are other churches on the outskirts of the centre at St Paul’s Road, off Burnthill Lane and on Anson Street.

The compact nature of the town centre may also impact on the ability to diversify its offer beyond traditional retail uses as there are few available sites or opportunities for redevelopment.

Barriers to Business

Structural changes in the general retail/leisure sector alongside the ongoing covid-19 pandemic represent the most pressing issue for the town centre. Given the proximity of the town to Stafford and Lichfield, the limited catchment of the town and the soon to be opened West Midlands Designer Outlet in the south of the district, demand from national multiple retailers for space in the town centre may be affected. The compact nature of the town centre and the limited number of available sites or opportunities for redevelopment may also limit the attractiveness of the town centre to new businesses, particularly those seeking commercial office space or larger units.

Operator Requirements

The 'Requirements List' identifies that there are currently 4 national retail, leisure and service operators seeking premises within Rugeley as shown in the table below. Despite not being listed, we also note that the discount convenience retailer Aldi have sought additional presence within the Rugeley. Though some operators may seek opportunities in out of centre locations, it is encouraging to note that there is still demand from some operators which may be met within the town centre.

Name	Min Size (sq m)	Max Size (sq m)
Retail/Services		
Lidl	1,300	2,460
Vets4Pets	140	185
Leisure – Food & Drink		
Starbucks (Café Fortune)	170	170
KFC	170	325

Opening Hours/Night-Time Economy

With the exception of the large foodstores and leisure service providers, the majority of operators in Rugeley town centre operate between the core hours of 8.30am – 6pm. Morrisons opens from 7am – 9pm daily (except for Sundays), while the large Tesco to the north of the town centre opens from 6am – midnight daily except for on Sundays when it operates from 10am – 4pm. The leisure service providers across the town centre operate later opening hours which helps to bring activity and footfall to the town centre outside of business hours. The size and role of Rugeley results in its evening and night-time economy offer is limited but we consider the existing provision to be adequate.

Vacancies

At the time of our survey, there were 22 vacant units across Rugeley Town Centre and 3,310sqm of vacant floorspace (11% of the total number of units and 10% of the total floorspace across the centre). The vacancy rates are slightly below the national average (12% of units and 11% of floorspace), though they have increased since 2015 when there were 16 vacant units and 2,960sqm of vacant floorspace.

There are no particular concentrations of vacant units in the Primary Retail Area, however 5 of the 8 units on Horsefair between St Pauls Road and Talbot Street are empty. These units are away from the main activity of the town centre and their peripheral position may have impacted on their viability. Though not surveyed by the Goad town centre uses plan, we noted a high proportion of vacant stalls within the indoor market units at Market Hall. Taking note of the 2015 town centre appraisal, it is clear that vacant units here are a longstanding issue. Efforts have been made to market units both online and within the markets themselves, though the they have not been met with success.

Photograph 6: Vacancies on upper Brook Street


Photograph 7: Vacant unit at the corner of Bees Lane and Lower Brook Street

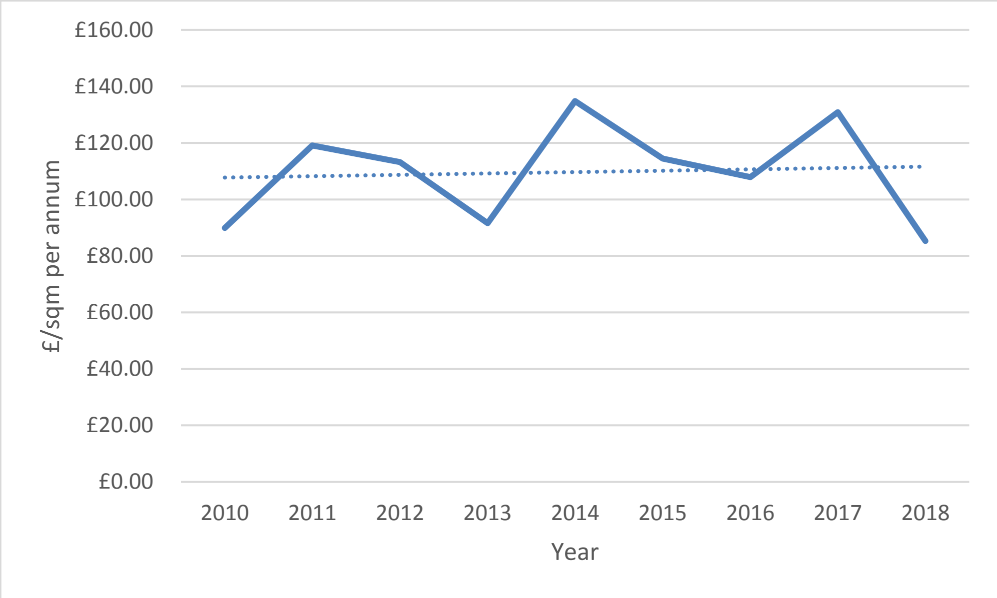

Photograph 8: Vacant unit in Market Hall

Vacancies


RUGELEY
SURVEYED: OCTOBER 2020
Experian
A world of insight
ANSON STREET
MARKET STREET
MARKET SQUARE
BOW STREET
UPPER BROOK STREET
ALBION STREET
BREES LANE
BROOK SQUARE
BREWERY STREET
ELMORE LANE
WESTERN SPRINGS ROAD
LICHFIELD STREET
WELLINGTON DRIVE
FORGE ROAD
HORSE FAIR
ST PAULS ROAD
TALBOT STREET
Key:
Vacant
Other
goad

Rents on Non-Domestic Property

Rental data has been obtained from EGi has been used to calculate average rental prices (per sq. m per annum) of commercial property in Rugeley Town Centre. Data from 2019 and 2020 is not available, but the data shows that the average rental prices have fluctuated in recent years. The highest rents were in 2014 at an average of £134.82 per sqm per annum and the lowest in 2018 at £85.29 per sqm per annum

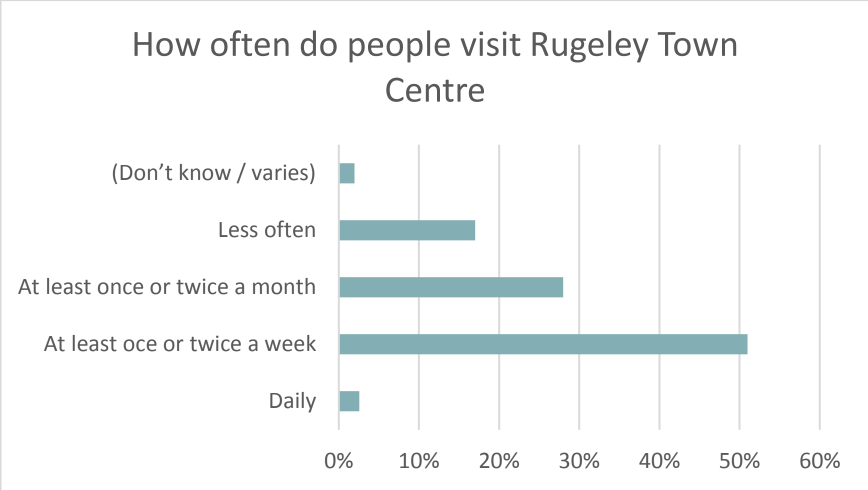


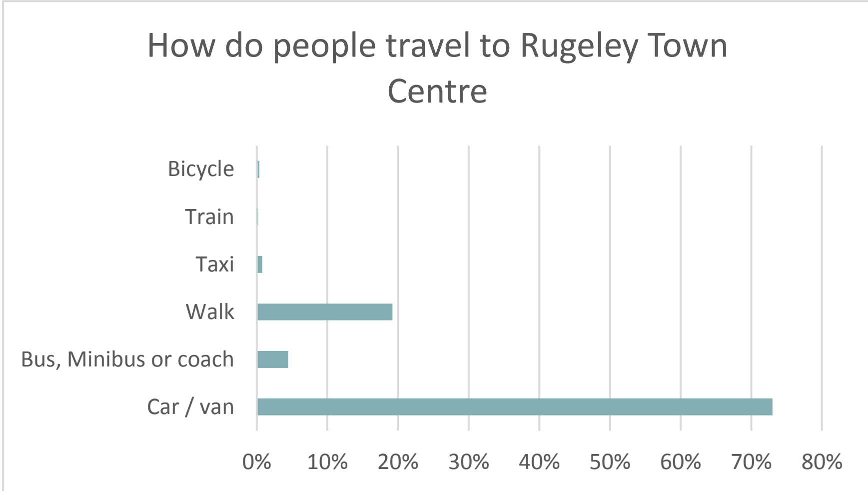
A review of online sources indicates that there are only three commercial units being publicly advertised for let within the town centre. Rents p/sqm range from £139.25 p/sqm to £194.81 p/sqm, with all three units located within the Primary Retail Area

When compared with commercial property in Cannock Town Centre, rents are presently comparable, however they have been significantly cheaper in Rugeley than Cannock in the past.

Customers' Views and Behaviour

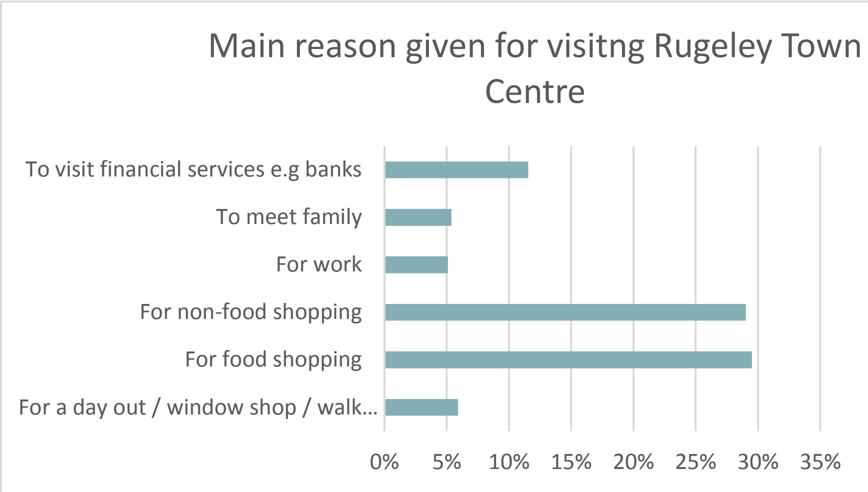
Using data from the NEMS household survey, we have been able to identify the views and behaviour of visitors to the town centre and understand the reasons why respondents visit Rugeley, what they like about it, and what, if anything would encourage them to visit more often.

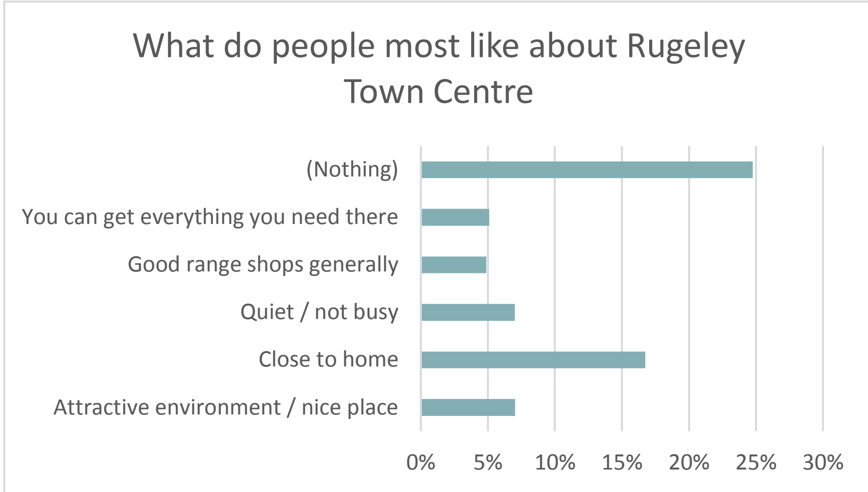




Of those who visit Rugeley, 3% do so on a daily basis, 51% visit at least once or twice a week, 28% visit at least once or twice a month, and 17% visit less often. The vast majority of people travel into the town centre by car or van (73%), 19% walk, and 4% travel in by bus, minibus or coach. Less than 1% of people indicated that they either cycled or took the train into Rugeley town centre.

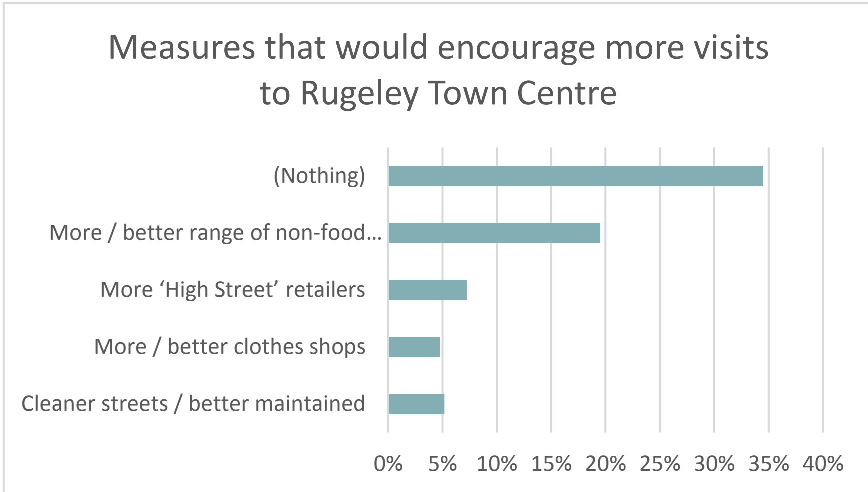
When asked for the main reason why they visit the town centre, food shopping and non-food shopping were the most common answers (30% and 29% respectively) followed by visits to financial service providers (12%), for a day out / to window shop / to walk about (6%), and to meet family or to go to work (both 5%).





When asked about what they most liked about Rugeley Town Centre, the most common answer from respondents was 'nothing' (25%). 17% of respondents however said that they liked the town centre as it was close to home, 7% said that it was because the centre is quiet and not too busy, 7% said it was because it provides an attractive environment or is a nice place, and 5% each said that the town centre provides a good range of shops, or that you can get everything you need there.

When asked about what would encourage them to visit the town centre more often, 20% said that more or a generally better range of shops would do so, 7% said there should be more 'high-street retailers', 5% said cleaner streets or a better maintained environment would encourage them to visit more often. 35% of respondents indicated that nothing would encourage them to visit the town centre more often which indicates they are either satisfied with the town centre or that they visit it enough already.



Pedestrian Flows

During our visits, despite the Covid-19 pandemic, reasonably good levels of pedestrian activity were observed in the main shopping streets of the town centre. We observed a steady flow of pedestrians walking through Shrewsbury Mall from the Morrisons Car Park to Market Street, while Market Square was observed to be busy with those visiting the outdoor markets.

The lowest levels of activity were observed along Horse Fair, the eastern end of Albion Street and both inside and immediately outside of Market Hall off Brook Square. The low levels of activity and the low occupancy rates at the indoor market may contribute to one another with the small range of units not attracting sufficient customers and that in turn, affecting the desirability of the stalls for traders. Horse Fair may be quieter during the day as many of the units in the area are geared towards the evening and night-time economy than everyday shopping. There is a concentration of takeaway units here which are located either side of the Wetherspoons Public House.

Accessibility

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

Road Access

Rugeley Town Centre is within an accessible location in terms of the surrounding road network. The A460 leads directly to the town centre and provides routes to Stafford in the north west, Hednesford and Cannock to the south, and the M6 toll motorway and A5 further beyond this. The A51, which runs north west to south east, is on the northern side of the town centre and connects Lichfield to the town. Much of Rugeley Town Centre is pedestrianised which means that vehicles wanting to access commercial units for loading/unloading or to park are directed around the centre along Elmore Road to the west, and St Pauls Road/Lichfield Street/Forge Road to the east. At the time of our visits, traffic was observed to be free-flowing.

Car Parking

There are a range of car parking facilities in Rugeley Town Centre including six Council-run car parks; Forge Road (130 spaces); St Joseph's Church on Lichfield Street (68 spaces); Market Hall (59 spaces); St Paul's Road (22 spaces); Market Street (20 spaces); and Taylors Lane (45 spaces).

There are several other additional privately owned and operated car parks including those at Morrisons on Forge Road, at Tesco off Power Station Road, outside Home Bargains and Argos on Wellington Street, and at the Brewery Street Shopping Centre. The Council-run car parks at Forge Road, Taylors Lane and St Paul's Road charge 90p for up to an hours parking, £1.80 for 1-2 hours and £2.70 for 2-3 hours. Charges are slightly more expensive at Market Street (70p for 0.5hrs) but slightly less at the Market Hall car park (£1.20 for 2 hrs). Although time limited, the car parks of Morrisons, Tesco, Home Bargains and Argos are free and they were all busy at the time of our visits.

Public Transport

Rugeley has two railway stations, though neither is located close to the town centre. Rugeley Town station on Wharf Road to the south of the town centre and approximately 10 minutes' walk. Services from here depart to Birmingham International station via Cannock and Hednesford, Birmingham New Street, and Walsall. Rugeley Trent Valley station is located approximately 1km to the north of the town centre on Colton Road. The station is on the West Coast Mainline with services to London Euston, and northbound to Crewe via Stafford. Connectivity to both stations from the town centre could be improved and we would recommend the better signposting was implemented.

Rugeley Bus Station is located on Elmore Lane adjacent to the Market Hall to the east of the town centre. It provides frequent bus services across the local area including Cannock, Hednesford, Stafford, Walsall and Lichfield. Though it was largely clean and tidy, the bus station does not serve as an attractive gateway to the town centre as it is positioned away from the main shopping streets and is overlooked by service yards and the rear of units fronting Upper Brook Street. If redevelopment proposals of the bus station do go ahead, we would recommend that connectivity to Brook Street and Upper Brook Street is improved.

Walking, Cycling and Disabled Access

The town centre is flat with wide pedestrianised streets making access easy for pedestrians and those with disabilities. Crossing points are provided on the trafficked roads surrounding the core shopping area allowing free movement to and from the surrounding areas. Though efforts have been made to promote connectivity between the main shopping core and the Tesco store in the north of the town centre, the Forge Rd/Mill Ln/Bryants Ln roundabout forms a barrier here preventing a clear, continuous walking route. Efforts should be made to improve connectivity here, perhaps with clearer signage, wider pavements or road markings, and as mentioned above, connectivity could also be improved with the railway stations and the town centre too.

Access for cyclists across Rugeley is generally good with several secure cycle spaces located throughout the town centre. Though Rugeley is not located on any national cycling routes and there are very few dedicated cycling lanes on the road network, the tow path along the Trent & Mersey Canal is popular with cyclists and it provides a traffic free route into the town centre from surrounding suburbs.

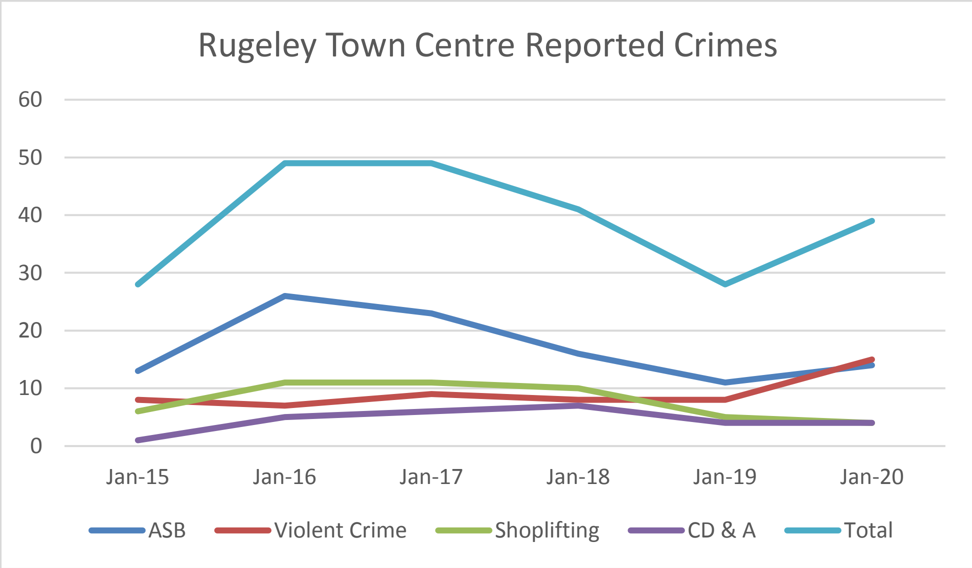
The town centre is considered to be generally good in terms of accessibility for the disabled and those with mobility problems and free parking is available for blue badge holders in car parks across Rugeley.

Perception of Safety and Occurrence of Crime

Rugeley generally feels safe during the daytime, particularly within the busy main shopping areas where there are good levels of passive natural surveillance.

The positioning of the bus station on the edge of the town centre and to the rear of the units on Upper Brook Street means that during quieter periods there is a lack of passive surveillance and the area may feel isolated for those waiting for their bus after dark. Similarly, the walkway between Tesco across the canal my also feel isolated after dark due to the lack of active frontages along it.

An analysis of reported crime in the town centre (ukcrimestats.com) indicates that reports of four common 'town centre' crimes (antisocial behaviour, violent crime, shoplifting, and criminal damage & arson) in a given month over the past five years have varied. January 2016 and 2017 saw the highest reports of these crimes (49) over the past five years, with 28 each in January 2015 and 2019, and 39 crimes reported in January 2020.



Like Cannock and Hednesford, Rugeley Town Centre benefits from being part of the Cannock Rugeley and Hednesford Business Crime Reduction Partnership which has been accredited by Partnerships Against Business Crime in Staffordshire (PABCIS). These organisations work together to prevent town centre crime and disorder by sharing information with police and other partners.

Town Centre Environmental Quality

The environmental quality of Rugeley Town Centre is generally good. Much of the town centre is covered by Rugeley Town Centre Conservation Area and several buildings are listed for their architectural or historical merit. The townscape is varied with predominantly Victorian or early 20th Century buildings and later infilling providing a variety of shopfronts.

The main shopping streets at Market Street, Market Square, Upper Brook Street and Bow Street provide a pleasant pedestrian shopping environment that is generally well maintained and easy to navigate. This area has been enhanced by the use strategic planting which breaks up the hard surfacing and uniform street furniture is used to good effect, providing visual interest and a link to the town's industrial past. This is particularly notable at Upper Brook street where a wrought-iron gateway welcomes shoppers to the centre.

At the time of our visits there was little in the way of litter or graffiti in the main shopping areas although some litter was observed along Horse Fair and within the car parks off Forge Road.

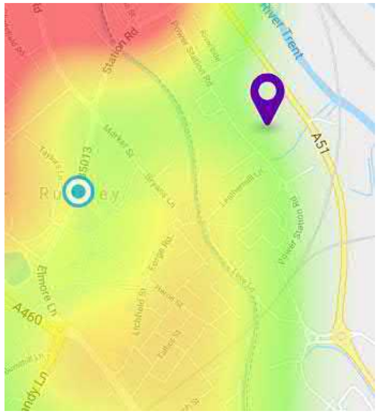
Despite the overall good quality of the environment in Rugeley, some areas could be improved. These include the Market Hall which is clearly underutilised and lacks visual interest and the area surrounding the bus station which is drab and lacking in activity. There is a danger that this unwelcoming entrance to the town centre could put off potential visitors and gives the wrong impression of the town and improvements could therefore be made here.

Photograph 9: Gateway to upper Brook Street

Photograph 10: Planting within Brook Square

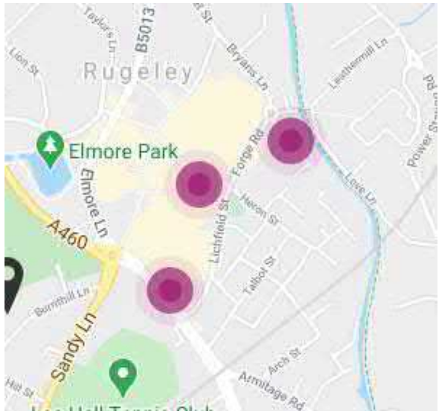
Digital Facilities in Rugeley

BT Wi-Fi Hotspots



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

Sky Cloud Wi-Fi Hotspots

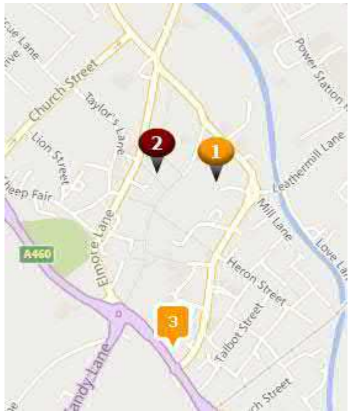


Source: www.thecloud.net/free-wifi/find-a-hotspot/

Collect+ Locations

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

Amazon Locker Locations



Source: amazon.co.uk

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

There is presently one BT hotspot and three Sky Cloud hotspots providing coverage of free-Wi-Fi across the town centre. In addition, there is one Collect+ location just outside of the town centre at the Esso garage on Western Springs Road and three Amazon Locker locations. Given the size of the town centre, we consider the digital offering in Rugeley to be good. The presence of three Amazon lockers is particularly beneficial and they have the potential to attract linked trips to other services in town centres.

Conclusions

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

Strengths and Opportunities

- Attractive town centre with generally good environmental quality and historic core
- Pedestrianised shopping area is open, legible and provides a good shopping environment
- Vacancy rate below the national average
- Reasonably good provision of leisure facilities for both daytime and night-time economies
- There is a good range of independent businesses which provide a distinct and individual retail/commercial offer
- Rugeley Area Action Plan identifies areas for improvement and ideas for the redevelopment of certain key sites
- Town centre is easily accessible by foot from nearby residential areas

Weaknesses and Threats

- Continued growth of internet shopping impacting retailers
- Increasing 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 may 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 may limit interest from retailers and commercial operators

Hednesford Town Centre Health Check Appraisal

Hednesford is the third largest centre within Cannock Chase District serving the role as an important retail and service centre for residents in the north eastern part of Cannock. Hednesford forms part of the same wider built up area as Cannock with the town centre is situated approximately 4km to the north west of the centre of Cannock.

The 2014 Policies Map defines a Town Centre Boundary but no Primary Retail Area. The Town Centre is linear and primarily concentrated along Market Street from the junction with the A460 Rugeley Road to the railway line at its north western extent. This road is lined with retail and commercial leisure units with some residential uses above at first floor level. The lightworks indoor Shopping Centre is accessed off Market Street and provides an arcade of several small retail units, and there is a large open town square adjacent with a clock tower forming the focal point of the centre.

The town centre boundary also incorporates The Chase Gateway and Victoria Shopping Park developments off Rugeley Road and Victoria Street respectively. Completed in 2012/2013, these developments were the culmination of a programme of significant investment into the town centre which have expanded the shopping and leisure offer.

Photographs of Hednesford Town Centre

Photograph 1: Clock Tower and Anglesey Lodge

Photograph 2: Building Detail on Market Street

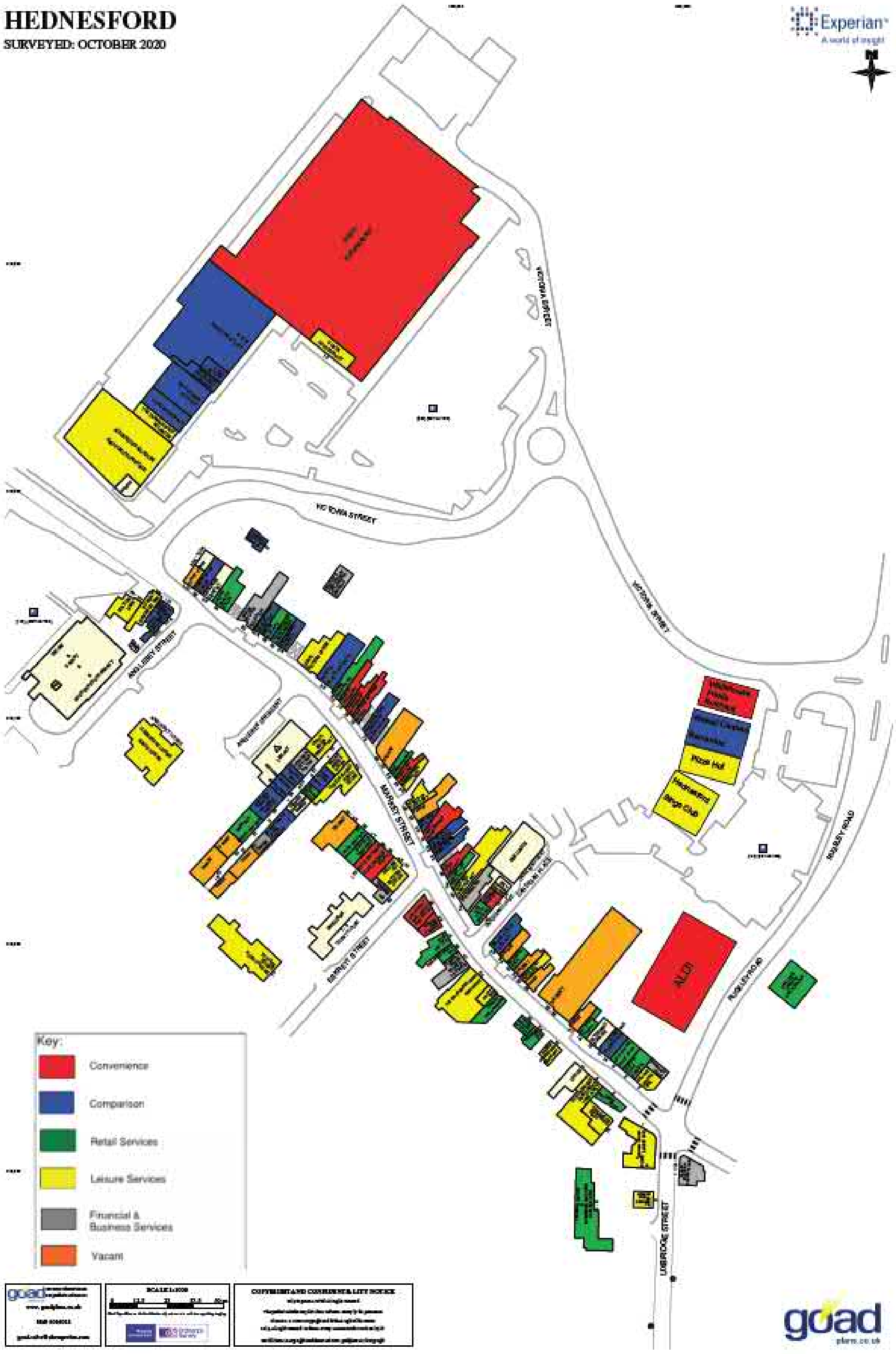
Photograph 3: Market Street Looking South

Photograph 4: Victoria Shopping Park

Photograph 5: The Aquarius Ballroom at Victoria Shopping Park

Photograph 6: Market Street looking North

Diversity of Main Town Centre Uses



Diversity of Main Town Centre Uses

Figure 1: Units in Hednesford (2015)

Category	No.	%	UK Av. %
Convenience	10	9	8
Comparison	39	33	33
Retail Service	19	16	14
Leisure Services	25	21	22
Financial and Business Services	11	9	11
Vacant	13	11	11
Total	**117**	**100**	**100**

Source: Experian

Figure 2: Floorspace in Hednesford (2015)

Category	Sq.m	%	UK Av. %
Convenience	10,748	45	15
Comparison	5,189	22	36
Retail Service	1,460	6	7
Leisure Services	4,788	20	23
Financial and Business Services	820	3	8
Vacant	911	4	9
Total	**23,916**	**100**	**100**

Source: Experian

Figure 3: Units in Hednesford (2020)

Category	No.	%	UK Av. %
Convenience	13	11	9
Comparison	28	24	29
Retail Service	24	21	15
Leisure Services	26	22	25
Financial and Business Services	9	8	10
Vacant	17	15	12
Total	**117**	**100**	**100**

Source: Experian

Figure 4: Floorspace in Hednesford (2020)

Category	Sq.m	%	UK Av. %
Convenience	10,095	39	15
Comparison	4,070	16	33
Retail Service	2,150	8	7
Leisure Services	5,395	21	26
Financial and Business Services	830	3	7
Vacant	3,090	12	11
Total	**25,630**	**100**	**100**

Source: Experian

Diversity of Main Town Centre Uses

Our appraisal of the diversity of town centre uses in Hednesford is based upon the latest Experian Goad survey which we have updated on our visits to the town centre in October 2020.

Across the town centre, there are a total of 117 retail, leisure and service units that occupy some 25,630 sqm gross floorspace. When compared with 2015, the amount of floorspace has increased by 1,714sq m, though it should be noted that the 2015 survey did not account for floorspace within the Lightworks Shopping centre.

Convenience Goods

The convenience shopping offer in Hednesford is good by virtue of the presence of the large Tesco and Aldi foodstores. Together, these stores accommodate the majority of the total convenience floorspace in the centre. The size of these stores also means that convenience goods retailing accounts for 39% of all floorspace across the centre (10,095sqm) which is more than double the national average. There are a total of 13 convenience goods retailers which, in addition to Tesco and Aldi, include three small convenience stores, three tobacconist/vape shops, two bakers & confectioners, a butcher, and a health food/supplement shop.

Comparison Goods

There are 28 comparison goods units within the town centre accounting for 24% of the total. These units accommodate 4,070sqm of floorspace, 16% of the total across the town centre. When looking at the proportion of comparison goods units across the centre, the offer is below the national average of 29% and significantly below in terms of the proportion of floorspace (33%). Given the size and local catchment of the town centre this is not necessarily a cause of concern and more reflective of the function of the centre as a local service/shopping destination.

Comparison goods units in Hednesford are generally small in size, with only 5 units larger than 160sq m in size. B&M Bargains occupies by far the largest unit at some 1,430sqm, with the next largest being Pets Corner at 310sq m. Given its limited catchment and local role national multiples are limited. In addition to B&M and Pets Corner, the town centre includes Card Factory, Co-operative Pharmacy, Savers, and Lloyds Pharmacy in addition to a collection of charity shops.

The comparison goods offer also reflects the local focus of the centre with 6 card & gift shops, 4 charity shops, 2 pet shops, 2 chemists, a discount store, jeweller and a menswear shop in addition to a kitchen store, carpet showroom, car sales garage and a photo studio. Overall, we consider the comparison goods offer to be reasonable given Hednesford's role.

Retail Services

There are 24 retail service units across the town centre, which is an increase in 7 units since the last survey was undertaken in 2015. The proportion of retail service units in the centre exceeds the national average (21% vs the UK average of 15%) and is broadly in line with the UK average in floorspace terms (7%) having previously been below average. 15 of the 24 retail service units are occupied either by beauty salons, hairdressers or barbershops with a further 2 tanning salons and a tattooist. The remaining units are occupied by opticians, car repair garages and a wedding service provider.

Overall, the retail service offer has improved since 2015 and is considered to be at a good level for the size and role of Hednesford.

Leisure Services

There are 26 commercial leisure units in Hednesford, 22% of the total number in the town centre. These units occupy 5,395sqm of floorspace, equating to 21% of all floorspace across the centre. When compared with facilities in centres nationally, the provision in Hednesford is slightly below average where centres typically accommodate around 25% of units and 26% of floorspace dedicated to leisure uses.

There are currently 5 pubs and bars in the town centre, 4 Indian restaurants, 4 cafes and coffee shops, 2 fast food takeaways, 2 betting offices. In addition to this, there is a gym unit operated by Puregym and the Aquarius Ballroom, a function suite and ballroom that also hosts conferences and events at Victoria Shopping Park, and a bingo club at Chase Gateway.

Despite providing a lower than average proportion of units and floorspace within the town centre, we consider Hednesford's leisure offer to generally be good. There is a diversity in the offer with restaurants, pubs and the ballroom/function suite serving the evening economy, while the cafes meet the needs of those visiting the centre during the day.

Financial and Business Services

Perhaps as could be expected in a small centre, the financial and business services which are provided cater to a local market. There are 5 financial advisors and accountants, 2 estate agencies, a solicitor and a printing firm, which together account for 8% of the units and 3% of the floorspace across the centre. Since 2015, we note that the offer has contracted slightly, and the local banking facility provided by Lloyds has closed meaning that there are now no branches of any high street bank in Hednesford. Provision in the town centre is slightly below the national average of 8% of total units and 7% of floorspace.

Markets

Replacing a previous artisan market held in the town centre, Hednesford Town Council has recently launched (October 2020) a new Farmers & Market which is held on the last Saturday of each month along Market Street. The event will be held between 10am – 3pm with stalls focusing of food & drink and locally produced goods.

Retailer Representation and Balance of Independent & Multiple Operators

The localised focus of the town centre means that the commercial and leisure operators in Hednesford are predominantly independent businesses. The national multiples in the centre are mainly located at the Chase Gateway and Victoria Shopping Park developments.

Victoria Shopping park accommodates Tesco, a Costa Coffee Shop, B&M Bargains, Card Factory, Pets Corner, Lloyds Pharmacy, PureGym and a Marie Curie charity shop. Chase Gateway hosts a Pizza Hut restaurant, Barnardos Charity Shop and Aldi. The only multiple retailers located elsewhere in the town centre are a Co-operative Pharmacy, Subway Sandwich Shop, a Boots Optician, betting offices operated by Coral and William Hill, and a Savers store.

Overall, excluding leisure operators, only 12% of occupied units in the town centre are operated by national and multiples, significantly less than the average of 36% nationally. Similar to Rugeley, we consider the number of independent traders across the town centre as a positive as it contributes to the character and individual offer of the town centre.

Other Town Centre Uses

Due to its small size, the defined town centre accommodates a limited number of other uses. These include the centrally located Hednesford Library adjacent to the Lightworks Shopping Centre on Anglesey Crescent, a veterinary surgery and a dental surgery. The Hednesford Valley Heath Centre is found a short walk to the north of the town centre on Station Road with the Trinity Church opposite.

In addition to the uses above, there are several small office buildings within the town centre and numerous dwellings which help bring activity and vibrancy.

Opening Hours/Night-time economy

The majority of operators along Market Street operate between core business hours of 8.30am – 6pm, though public houses, bars, restaurants and takeaway units typically will operate later hours into the evening. Opening hours are generally later within Victoria Shopping Park and Chase. Tesco opens until midnight during weekdays and Saturdays, B&M until 9pm and Aldi until 10pm.

Barriers to Business and Operator Requirements

We consider the main barriers preventing additional retail, leisure and commercial operators locating to Hednesford Town Centre are its proximity to Cannock and other larger centres where a wider range of premises may be available with a potentially larger catchment of customers.

The latest available information from 'The Requirements List' (November 2020) suggests that there are presently no national or multiple operators seeking premises within the town centre.

Vacancies

There are 17 vacant units across Hednesford Town Centre equating to 15% of the total number of units. The vacancy rate is higher than the national average where around 12% of units across a typical centre would be vacant. When compared with 2015, the number of vacancies has increased by 4 units though it appears that several units vacant at that time have been re-occupied.

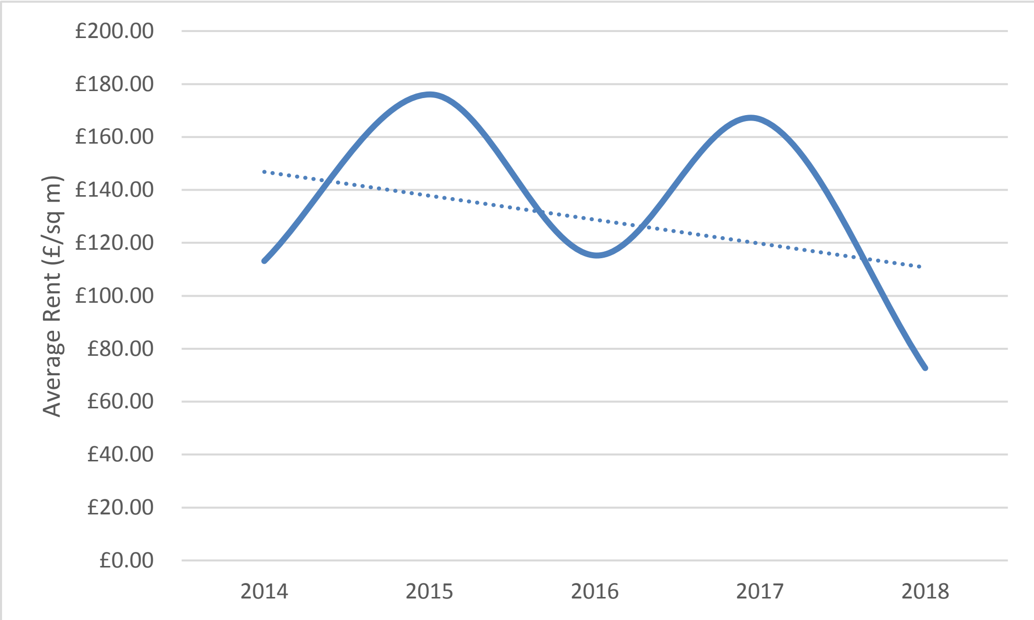
The largest vacant units in the centre are at 22-26 Market Street, formerly occupied by B&M, and the former Co-Operative foodstore at Anglesey Street. We note that B&M bargains has relocated to the former Poundworld unit at Victoria Shopping Park and the Co-op closed in January 2020. Though vacant units are dispersed across the centre, there are concentrations within the Lightworks shopping centre (4 units) and at the southern end of Market Street around the former B&M unit.

Vacancies


HEDNESFORD
SURVEYED: OCTOBER 2020
Experian
VICTORIA STREET
MARKET STREET
ALDI
Pizza Hut
Key:
Vacant
Other
goad

Rents on Non-Domestic Property

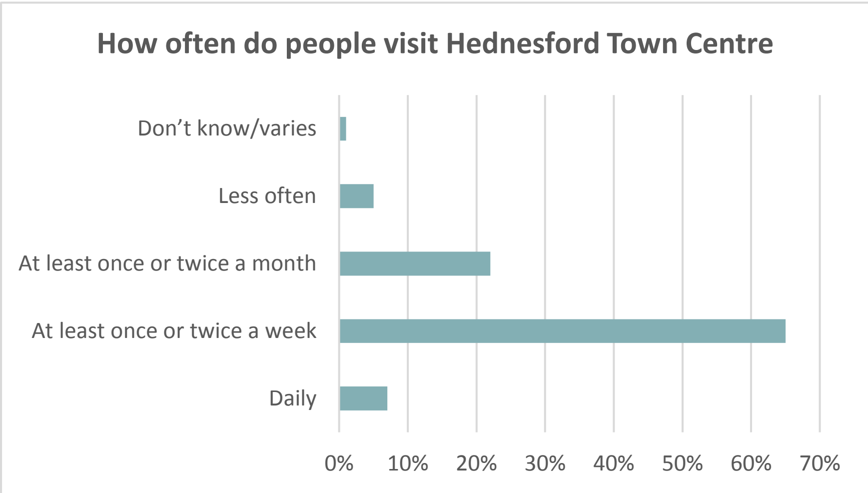
There is only limited historical data available relating to commercial rents in Hednesford, with lease details on retail and leisure units only available from 2014 – 2018 through EGi. These details have been analysed and provide an indication of rental prices across the town centre over these years. The data indicates that rental rates have varied since 2014 when occupiers were charged an average of £133.12 per sqm per annum, rising to £166.67 in 2017 and then dropping to £72.68 in 2018.



At the time of writing, there was no publicly available data relating the rents being currently commanded by available commercial units in the centre.

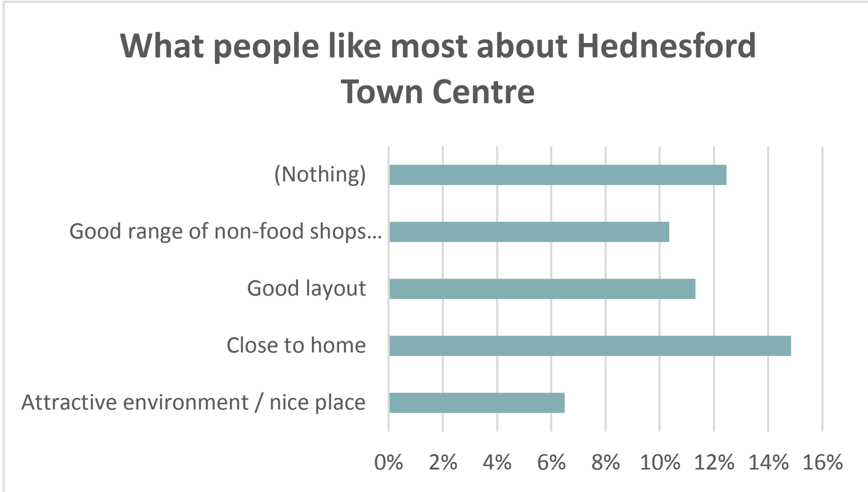
Customers' Views and Behaviour

Using data from the NEMS household survey, we have been able to identify the views and behaviour of visitors to the town centre and understand the reasons why respondents visit Hednesford, what they like about it, and what, if anything would encourage them to visit more often.



Of those who visit Hednesford Town Centre, 7% visit on a daily basis, 65% visit at least once or twice a week, 22% visit at least once or twice a month, and 5% visit less often. The majority (67%) of people travel into the town centre by car or van, 21% walk into the centre, and 10% travel in by bus, minibus or coach. 2% of people indicated that they usually took the taxi into Hednesford while no-one indicated that they cycled in or took the train.

When asked for the main reason why they visit the town centre, food shopping was the most common answer from respondents (34%), followed by non-food shopping (18%), for a day out/a walk/to window shop (13%), to visit hairdressers or beauty salons etc (6%) and for work (6%). Other reasons for visiting included to visit family (5%), and to visit other service providers such as travel agents, estate agents etc, to visit bars or pubs, and to meet friends and/or family (all 4%).



When asked about what they most liked about Hednesford, the most common answer from respondents was that it was close to home (15%), 12% said they liked nothing about the town centre, 11% said it had a good layout and 10% said it had a good range of shops.

When asked about what would encourage them to visit the town centre more often, a lot of responses centred on the range of shops. 10% said a better range of shops generally would encourage them to visit the centre more, 9% suggested a better range of clothes shops would, 4% suggested more independent shops, and 4% suggested more or better leisure facilities. Just under half of respondents indicated that nothing would encourage them to visit the town centre more often, indicating they are either satisfied with the town centre as it is, or that they visit the centre enough already.

Pedestrian Flows

We found there to be variable levels of pedestrian activity throughout the centre at the time of our visits, with activity focussed around the units at Victoria Shopping Park, those at Chase Gateway, and by the public square at the north west of Market Street.

Victoria Shopping park and Chase Gateway were monitored to be busy throughout the majority of the day with the car park being busy, while activity levels noticeably increased at the northern end of Market Street during the middle of the day with people observed buying lunch and sitting outside.

Lower levels of activity were observed further south along Market Street, though this may be reflective of the vacant units in this part of the town centre. Similarly, the Lightworks Shopping Centre where there is another concentration of vacancies was observed as being quiet during our visits with few relatively few shoppers.

Accessibility

Road Access

Hednesford Town Centre is situated between Cannock Road and the A460 Rugeley Road which both run north to south through the district. The A460 Rugeley Road connects Hednesford directly to Rugeley Town Centre in the north of the district, and it connects with the A5 and the wider road network to the south.

The local road network around Hednesford Town Centre forms a natural anti-clockwise circuit from Chase Gateway in the east, north west to Victoria Shopping Park, and then south to Market Street. Traffic is restricted along a one-way system on Market Street to a southerly direction which helps to limit traffic levels and improve the shopping environment for pedestrians.

Car Parking

There are 3 main car parking areas in Hednesford town centre which are all conveniently located for shoppers. These are found at Victoria Shopping Park (approx. 640 spaces), the car park to the rear of the former Co-op store on Anglesey Street (approx. 190 spaces) and at Chase Gateway where there are approximately 170 spaces. Hednesford Station car park is also available further west along Anglesey Street with approximately 60 spaces and limited on street parking is available along Market Street.

Public Transport

Hednesford benefits from a centrally located train station situation at the northern edge of the town centre off Market Street and Anglesey Street. Regular services are available to Cannock, Rugeley Town and Rugeley Trent Valley with onward connections available to the wider national rail network.

Four bus stops are located on Victoria Street providing services within the local area, and there is a private taxi office located on Anglesey Street outside the station.

Walking, Cycling and Disabled Access

The town centre is highly accessible for pedestrians owing to its small size. Pavements along Market Street are wide and are in generally good condition. The street layout is legible making navigation easy, although the connection between the car park at Chase Gateway and Cardigan Place/Market street could be improved. .

Hednesford has conveniently located cycle parking shelters at both Victoria Shopping Park and Chase Gateway. These facilities had plenty of space at the time of our visits and benefitted from prominent positions to aid security via natural surveillance.

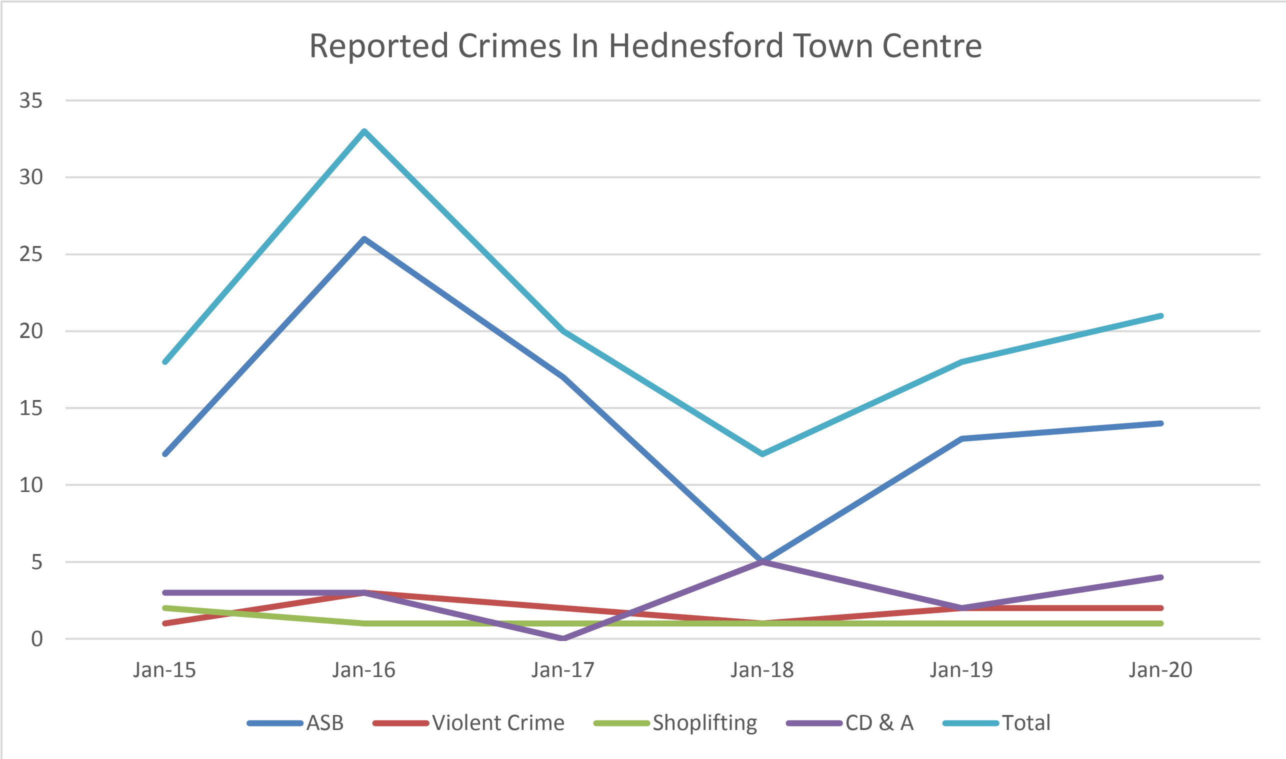
The town centre is considered to be generally good in terms of accessibility for the disabled and those less mobile , though a limited number of dropped kerbs along Market Street may hinder the ability to cross the road easily for those in wheelchairs.

Perception of Safety and Occurrence of Crime

Hednesford Town Centre generally feels safe and secure, with the main shopping areas benefitting from good levels of natural surveillance from active frontages. At Victoria Shopping Park and Chase Gateway, good levels of activity, a well maintained environment, good lighting and visibly apparent CCTV monitoring all help to engender perceptions of safety too.

Hednesford Town Centre benefits from the district-wide Business Crime Reduction Partnership which is accredited by Partnerships Against Business Crime in Staffordshire (PABCIS). These organisations work together to prevent town centre crime and disorder by sharing information with police and other partners.

A study of crime statistics in the town centre (ukcrimestats.com) indicates that reports of four common 'town centre' crimes in a given month over the past five years are at a lower level than in Cannock and Rugeley town centres. Despite some variation, crime rates remain fairly steady with between 18 and 33 crimes reported in January over the past five years. Anti-social behaviour is reported as the most common offence, with much lower levels of violent crime, shoplifting and criminal damage & arson.



Town Centre Environmental Quality

The environmental quality throughout the town centre is generally good. Market Street has a particularly attractive built form with various buildings of visual interest. The pedestrian environment is well maintained and has benefitted from investment over the last decade.

The public square with its central clocktower makes for an attractive focal point and the planting works particularly well, adding colour and variety to the street scene. This square provides fine views of Anglesey Lodge, a 19th Century former grand residence which has undergone sympathetic conversion to use as a public house by Wetherspoons and is now known as 'The Hednesford Lodge'. The Miners' Memorial on the edge of the square outside of the library also provides a good connection with Hednesford's former industrial past.

Shop fronts within the town centre are generally well maintained and provide a traditional high-street feel to the centre, though several vacant units looked in need of maintenance. The former Co-op unit in particular detracts from the north of the centre and is in need of significant investment as it has a very dated appearance with limited active frontages. The redevelopment of this unit would provide further boost to the attractiveness and vitality of this part of the town centre.

The recent developments at Victoria Shopping Park and Chase Gateway have helped to modernise the centre and provide linkages to Victoria Park to the north. This large area of green space forms an attractive backdrop to these developments and contributes to the general environment.

Overall, we consider that Hednesford Town Centre is a pleasant environment accommodating a good mix of modern and traditional shopping facilities.

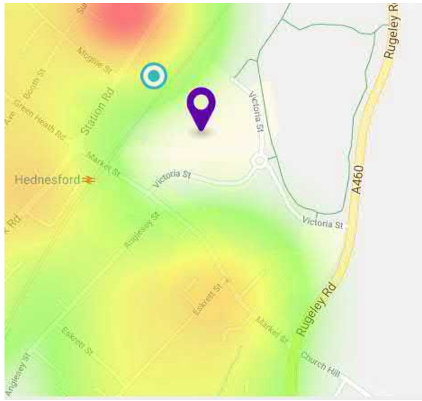
Photograph 7: Vacant former Co-op Unit

Photograph 8: The Hednesford Lodge

Photograph 6: Miners' Memorial

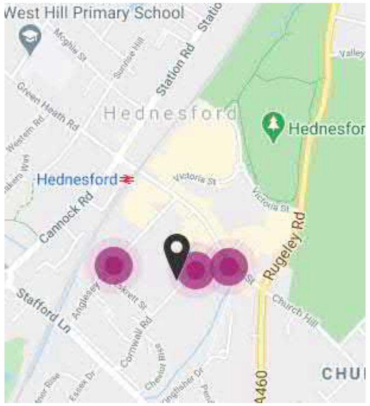
Digital Facilities in Hednesford Town Centre

BT Wi-Fi Hotspots



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

Sky Cloud Wi-Fi Hotspots



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

Collect+ Locations

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

Amazon Collect Locations

Source: amazon.co.uk

There is one BT hotspot location in the town centre at the Tesco store on Queen Street and 4 Sky 'The Cloud' hotspots including at the Hednesford Lodge Pub on Anglesey Street, and the Indian Smokehouse restaurant on Market Street. These provide relatively good coverage across Market Street and the number of hotspots is considered good for the size of the town centre. The centre has a reasonable provision of click and collect facilities with 3no. collection facilities located along Market Street at the Post Office, Booze 4 Less, and News & Booze Express. Booze 4 Less also provides a Collect + Location.

Conclusions

Overall, we consider Hednesford Town centre to display reasonable levels of vitality and viability. The principal strengths, weaknesses, opportunities and threats to the centre are as follows:

Strengths & 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 & 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
- 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

1.1 Introduction

1.1.1 This appendix contains the methodology for undertaking the vitality and viability health checks in line with national retail planning policy.

1.2 National Planning Policy Framework (NPPF)

1.2.1 The National Planning Policy Framework (NPPF) was published in March 2019. The NPPF sets out the Government's planning policies for England and how these are expected to be applied. It sets out the Government's requirements for the planning system only to the extent that it is relevant, proportionate and necessary to do so.

1.2.2 The NPPF identifies a number of factors which are of relevance in delivering sustainable development, with one such factor being the need to ensure the vitality of town centres. Paragraph 85 of the NPPF states that planning policies and decisions should support the role that town centres play at the heart of local communities, by taking a positive approach to their growth, management and adaption. Paragraph 85 also requires planning policies to promote the long-term viability and vitality of town centres. It notes this should be achieved by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters.

1.3 Ensuring the Vitality of Town Centres Planning Practice Guidance

1.3.1 Whilst the NPPF does not provide a list of indicators to be used to assess the health of a centre, such criteria have been published in the NPPG (July 2019). Paragraph 006 of the Practice Guidance identifies a series of key indicators which are of relevance in assessing the health of a centre over time. Indicators which should be monitored on a regular basis in order to judge the health of a centre and its performance over time include the following:

- Diversity of uses - data on the diversity of uses was collated during fieldwork in October 2020.
- Proportion of vacant street level property - vacant properties were also identified during the undertaking of on-site surveys.

- Retailer representation and intentions to change representation - information on the current strength of the defined centres, retailer representation, and retailer requirements, has been derived from on-site surveys and various published sources.

- Commercial rents - where available rental data has been sourced from recognised UK property consultants/retail data providers.

- Commercial yields on non-domestic property - where available commercial yield data has also been sourced from property consultants/retail data providers.

- Pedestrian flows - general footfall and pedestrian flows were also observed during WYG's on-site surveys.

- Accessibility - consideration of access to and around the centres is informed by WYG's on-site surveys.

- Perceptions of safety and occurrence of crime - informed by our observations and initiatives present in each centre.

- Customers' experience and behaviour - information on views is based on the NEMS household survey and in-centre visitor survey results, along with feedback from key stakeholders, where available.

- State of town centre environmental quality - consideration of the quality of the buildings and public realm in the centre has also been informed by WYG's 'on the ground' observations.

- Balance between independent and multiple stores – information on the balance between independent and multiple retailers has been derived from on-site surveys.

- Extent to which there is evidence of barriers to new businesses opening and existing business expanding – informed by our observations and discussions with the Council and, if relevant, stakeholders.

- Opening hours/availability/extent to which there is an evening and night-time economy offer – informed by observations during visits to each centre and a review of existing store opening hours and evening economy provision.

1.4 Cannock Chase District Health Checks

1.4.1 For the purposes of this Study the health check assessments for Cannock, Rugeley and Hednesford Town Centres are based on the Experian Goad boundary area of the town centres (surveys undertaken by Experian and updated by WYG Planning in October 2020). The use of the Goad boundary is helpful in allowing data on the occupation of units to be 'benchmarked' with national average Goad data. It should however be noted that the Goad Plan boundaries differ slightly to the adopted town/district centre boundaries. In Rugeley for example, the Goad Plan boundary omits the large Tesco store on Power Station Road.

1.1 Introduction

1.1.1 This appendix provides an assessment of convenience and comparison goods quantitative needs (retail capacity). As part of the needs assessment the current population and available expenditure (for both convenience and comparison goods) across the Study Area is reviewed and assessed.

1.2 Retail Capacity

1.2.1 We have examined the need for new convenience and comparison goods floorspace over the agreed reporting periods to 2040 (i.e. at 2026, 2031, 2036 and 2040)

1.2.2 In considering the capacity figures it should be noted that the NPPF no longer requires for local plans to meet the needs 'in full' in the plan period. Given the uncertainty in forecasting long term retail trends, policies only need to look at least ten years (in this case to 2031) and not necessarily over the full plan period when allocating sites to meet the 'likely' need for town centre uses.

1.2.3 A complete series of quantitative retail capacity tables are provided at Appendices Ji, Jii, and Jiii to provide further detail in terms of the step-by-step application of our quantitative assessment methodology.

1.3 Population & Retail Expenditure

Population

1.3.1 The baseline population data and projections within each postal code sector have been derived from the latest available Experian Micromarketer MMG3 data which uses the ONS 2016-based subnational population projections and was released in 2019.

1.3.2 As shown in Figure 1.1 below, the defined Study Area is estimated to contain a resident population of approximately 200,949 people at 2019 rising to 206,305 people at 2040. This represents an increase in population within the Study Area of 5,356 people (equating to an increase of 2.7%) between 2021 to 2040.

1.3.3 Figure 1.1 provides a detailed breakdown of the forecast population change within each survey zones in each of the reporting period to 2040.

Figure 1.1: Study Area Population by Survey Zone (2021-2040)

Zone	2021	2026	2031	2036	2040
Zone 1 – South East Stafford	12,123	12,272	12,401	12,439	12,469
Zone 2 – West Rugeley	14,696	14,742	14,739	14,739	14,739
Zone 3 – East Rugeley	12,278	12,279	12,257	12,241	12,228
Zone 4 – Colton, Blithbury and Handsacre	12,125	12,268	12,379	12,467	12,537
Zone 5 – Hednesford	32,102	32,415	32,634	32,894	33,102
Zone 6 – North Cannock	25,475	25,557	25,647	25,840	25,994
Zone 7 - Cannock	16,035	16,074	16,052	15,988	15,937
Zone 8 – Norton Canes	9,801	9,900	10,004	10,051	10,089
Zone 9 – Cheslyn Hay & Landywood	18,919	19,104	19,319	19,571	19,773
Zone 10 – Brownhills	16,815	17,140	17,400	17,692	17,926
Zone 11 – Burntwood & Chasetown	30,580	30,921	31,144	31,348	31,511
Total	**200,949**	**202,672**	**203,976**	**205,270**	**206,305**

Source: Table 1, Appendix Ii

Expenditure

1.3.4 In order to calculate per capita convenience and comparison goods expenditure, we have utilised Experian Micromarketer G3 data which provides detailed information on local consumer expenditure and takes into consideration the socio-economic characteristics of the local population. Experian is a widely accepted source of expenditure and population data and is regularly used by WYG and other retail/leisure planning consultants in calculating retail capacity.

1.3.5 Per capita growth forecasts have been derived from Experian Retail Planner Briefing Note 18 (October 2020). Appendix 3 of the Retail Planner Briefing Note identifies the following annual growth forecasts for convenience and comparison goods which inform our assessment.

Figure 1.2: Expenditure Growth Forecasts

Year	Comparison (%)	Convenience (%)
2020	-8.5	8.4
2021	6.5	-6.2
2022	3.8	0.2
2023	3.6	0
2024	2.9	0.1
2025	2.8	0.1
Year	Comparison (%)	Convenience (%)
2026	2.9	0
2027	2.9	-0.1
2028	2.8	0
2029	2.9	0
2030	2.9	-0.1
2031	2.9	0
2032	2.9	0
2033	2.9	0.1
2034	2.9	0.1
2035	2.9	0.1
2036	2.9	0.1
2037	2.9	0.1
2038	2.9	0.1
2039	2.9	0.1
2040	2.9	0.1

Source: Appendix 3, Retail Planner Briefing Note 18

1.3.6 For comparison goods, Experian forecast that expenditure rates will vary in the short term (2020-2026), from a point of negative growth in 2020 to a positive growth rate of of 6.5% in 2021. The rates of growth are then forecast to reduce to between 2.9% and 3.8% in 2022-26, and then remain at between 2.8%-2.9% in the longer term (2026-40).

1.3.7 For comparison goods, Experian again forecast variable growth rates in the very short term from 8.4% growth in 2020 to a negative growth rate of -6.2% in 2021. In the longer term however, growth rates are forecast to remain subdued, varying between a slight reduction (-0.1%) and slight growth (0.2%) each year to 2040.

1.3.8 Experian Retail Planner Briefing Note 18 also provides a forecast as to the proportion of expenditure which will be committed through special forms of trading (comprising 'non-store retailing', such as internet sales, TV shopping and so on) over the reporting period. In accordance with retail planning standard practice, we have removed any expenditure which survey respondents indicated was committed via special forms of trading and instead have made an allowance derived from Experian's recommendation.

1.3.9 In considering special forms of trading, it should be noted that many products which are ordered online are actually sourced from a physical store's shelves or stockroom (particularly in the case of convenience goods). Accordingly, expenditure committed in this manner acts to support stores and should be considered 'available' to tangible retail destinations.

1.3.10 Accordingly, in order not to overstate the influence of expenditure committed via special forms of trading, our approach is based on Experian's 'adjusted' figure (provided at Appendix 3 Retail Planner Briefing Note 18) which makes an allowance for internet sales which are sourced from stores. The proportion of expenditure committed through special forms of trading cited below at Figure 1.3 is removed from identified expenditure as it is not available to stores within the Study Area.

Figure 1.3: Special Forms of Trading Forecasts

Year	Comparison (%)	Convenience (%)
2021	21.8	5.4
2026	25.2	6.3
2031	27.2	6.9
2036	28.2	7.2
2040	28.7	7.4

Source: Appendix 3, Retail Planner Briefing Note 18

1.3.11 Based on the Retail Planner growth rates and special forms of trading allowances, it is possible to produce expenditure estimates for each survey zone at 2021, 2026, 2031, 2036, and 2040. In doing so, our assessment takes into account both per capita retail expenditure growth and population change.

Convenience Goods Expenditure

1.3.12 Taking into consideration the above increases in population and per capita expenditure, it is estimated that, at 2021, the resident population of the Study Area will generate some £425.9m of convenience goods expenditure. Available convenience goods expenditure is then forecast to decrease to £405.1m at 2040, which represents a decrease of £20.9m (or -4.9%) between 2021 and 2040, as shown in Figure 1.4 below.

Figure 1.4: Total Available Study Area Expenditure – Convenience Goods (£m)

2021 (£m)	2026 (£m)	2031 (£m)	2036 (£m)	2040 (m)		Growth 2021-2026(£m)	Growth 2021-2031(£m)	Growth 2021-2036(£m)	Growth 2021-2040 (m)
425.9	400.7	399.9	402.3	405.1		-25.2	-26.0	-23.6	-20.9

Source: Table 5, Appendix Ji
2018 Prices

Comparison Goods Expenditure

1.3.13 Figure 1.5 below sets out our estimation that the resident population of the Study Area generates some £543.6m of comparison goods expenditure in 2021. Available comparison goods expenditure is then forecast to increase to £918.8m at 2040, which represents an increase of £375.2m during this period. As noted earlier, given the uncertainty in forecasting long term retail trends these longer estimated expenditure growth should be considered with caution.

1.3.14 Whilst the identified expenditure increase is significant, the rate of growth is more modest than that previously achieved, principally because of the expectation that an ever-increasing proportion of comparison goods expenditure will be committed through internet shopping.

Figure 1.5: Total Available Study Area Expenditure – Comparison Goods (£m)

2021 (£m)	2026 (£m)	2031 (£m)	2034 (£m)	2040 (m)		Growth 2021-2026 (£m)	Growth 2021-2031 (£m)	Growth 2021-2036 (£m)	Growth 2021-2040 (m)
543.6	635.3	712.4	821.2	918.8		91.8	168.8	277.6	375.2

Source: Tables 3a-e, Appendix Ji
2017 Prices

1.3.15 For the purposes of this Study, comparison goods expenditure has been divided into 11 subcategories: 'DIY', 'Large Electrical Household Items', Small Electrical Items', and 'Furniture, Carpets & Floor Coverings' (these four categories collectively being referred to as bulky goods) and, 'Clothing & Footwear', 'CDs, DVDs and Books', 'Furnishings & Household Textiles', 'Health and Beauty/Chemist Goods', 'Small Household Goods', 'Clocks Jewellery & Watches', and 'Toys, Games, Bicycles and Recreational Goods' (collectively referred to as non-bulky goods). The proportion of expenditure directed to each sub-category is estimated by Experian on a zonal basis.

1.3.16 In considering the above, it should be noted that if an excess of expenditure manifests itself within the Study Area, this does not necessarily translate directly into a requirement for additional floorspace. In assessing quantitative need, it is also necessary to take account of:

- Existing development proposals;
- Expected changes in shopping patterns; and
- The future efficiency of retail floorspace.

Capacity Formula

1.3.17 For all types of retail capacity assessment, the conceptual approach is identical, although the data sources and assumptions may differ. The key relationship is Expenditure (£m) (allowing for population change and retail growth) less Turnover (£m) (allowing for improved 'productivity') which equals Surplus or Deficit (£m).

- **Expenditure (£m)** – The expenditure element of the above equation is calculated by taking the population within the defined catchment and then multiplying this figure by the average annual expenditure levels for various forms of retail spending per annum. The expenditure is estimated with reference to a number of factors, namely:
  - Growth in population;
  - Growth in expenditure per person per annum; and
  - Special Forms of Trading (e.g. internet shopping, catalogue shopping and so on).
- **Turnover (£m)** – The turnover figure relates to the annual turnover generated by existing retail facilities within the Study Area. The turnover of existing facilities is calculated using Mintel Retail Rankings and Global Data reports – independent analysis which lists the sales densities for all major multiple retailers.
- **Surplus/Deficit (£m)** – This represents the difference between the expenditure and turnover figures outlined above. A surplus figure represents an effective under provision of retail facilities within the Study Area (which, all things being equal, would suggest that additional floorspace could be supported), whereas a deficit would suggest a quantitative overprovision of retail facilities.

1.3.18 Although a surplus figure is presented in monetary terms, it is possible to convert this figure to provide an indication of the quantum of floorspace which may be required. The level of floorspace will vary dependent on the type of retailer proposed and the type of goods traded. For example, in the case of comparison goods, non-bulky goods retailers tend to achieve higher sales densities than bulky goods retailers. However, within the bulky goods sector itself there is significant variation, with electrical retailers tending to have a much higher sales density than those selling DIY or furniture goods.

1.4 Potential Capacity for Future Convenience Goods Floorspace

1.4.1 In order to ascertain the likely need for additional convenience floorspace in the retail centres in Cannock Chase, it is first necessary to consider the performance of the current provision. Given the geography of the towns and their existing retention of convenience goods expenditure, it is assumed that the future convenience goods expenditure available to each retail centre in the district will be commensurate with their current market share.

1.4.2 Figure 1.6 sets out the current convenience goods trading position in the towns compared against the 'benchmark' (or anticipated) turnover of existing convenience goods floorspace and projects this forward to 2040. The benchmark turnover differs for each operator based on its average turnover per sq m throughout the country. Although robust up-to-date information is available in terms of the convenience goods floorspace provided by large foodstores, it can be more difficult to quantify the extent of local convenience provision as there is no single comprehensive database to rely upon. Where we have been unable to verify the exact quantum of floorspace provided by existing smaller scale convenience stores, we have assumed that stores are trading 'at equilibrium' (i.e. the survey derived turnover equates to the expected level of turnover).

1.4.3 Our assessment is based upon a 'goods based' approach, which disaggregates expenditure by category type, and it is important to recognise that major foodstore operators generally sell an element of non-food goods such as books, compact discs, clothing and household goods. To account for this, we have assessed the split in convenience/comparison goods provision in each store having regard to our own observations during store visits and the typical convenience/comparison floorspace ratio published by retail data provider, Global Data. This provides an indication of the likely sales area dedicated to the sale of convenience goods at each store.

1.4.4 Our assessment for the study area identifies that the expected benchmark turnover of existing convenience goods provision in the administrative area is £279.4m per annum at 2021, which is £2.3m less than the identified survey-derived turnover of £277.1m. This suggests that, taken cumulatively, existing convenience goods provision in the study area is 'under trading' slightly when compared to expected turnover.

1.4.5 There are instances where specific facilities trade strongly or relatively poorly. For example, the Aldi store at Chase Gateway, Hednesford has an estimated benchmark turnover of £7.1m but turns over an estimated £23.1m is trading particularly well. In contrast, the Sainsbury's store at Orbital Retail Park, with an estimated benchmark turnover of £40.5m, but turns over an estimated £34.4m is a lesser performing store.

1.4.6 It is necessary to consider the capacity on an individual town basis. Figure 1.6 below sets out the convenience goods expenditure capacity estimates for the three town centres in Cannock Chase, and for the district as a whole. For the avoidance of doubt the expenditure and floorspace capacity figures identified for each year are not cumulative figures. They represent the capacity between the base year (2021) and the year identified and should not be added together. For example, the capacity figures identified at 2031 represent the capacity between 2021 and 2031 and the capacity figures identified at 2040 represent the capacity between 2021 and 2040. If planning permission is granted for retail floorspace say in 2031 the floorspace requirement/capacity identified for the years 2031 and 2040 would both reduce by the same amount.

1.4.7 Figure 1.6 shows that at present (2021), there is a minimal amount of floorspace capacity in Cannock at 100sq m. By 2031 however (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.

1.4.8 A similar trend is forecast within Rugeley, where there is assessed to currently be minimal floorspace capacity (200sq m) floorspace capacity of 200sq m which is then forecast to reduce to nil by 2026 and for the remainder to the plan period.

1.4.9 In contrast to Cannock and Rugeley, primarily due to the assessed overtrading of existing stores, there is estimated to be capacity for additional floorspace in Hednesford over the next 10 years. There is assessed to currently be floorspace capacity of 1,300sq m net which is forecast to decrease to 1,000sq m net in the medium and long term.

Figure 1.6: Quantitative Need for Convenience Goods Floorspace

Year	Surplus Expenditure £m	Commitments £m	Residual £m	Floorspace Requirement (sq. m net)
Cannock				
2021	1.2	NA	1.2	100
2026	-4.3	NA	-4.3	-
2031	-4.5	NA	-4.5	-
2036	-4.0	NA	-4.0	-
2040	-3.5	NA	-3.5	-
Rugeley				
2021	2.7	NA	2.7	200
2026	-1.9	NA	-1.9	-
2031	-2.0	NA	-2.0	-
2036	-1.6	NA	-1.6	-
2040	-1.2	NA	-1.2	-
Hednesford				
2021	14.8	NA	14.8	1,300
2026	11.1	NA	11.1	1,000
2031	11.0	NA	11.0	1,000
2036	11.3	NA	11.3	1,000
2040	11.7	NA	11.7	1,000
District-Wide				
2021	0.7	NA	0.7	100
2026	-17.9	NA	-17.9	-
2031	-18.4	NA	-18.4	-
2036	-16.8	NA	-16.8	-
2040	-15.0	NA	-15.0	-

Source: Tables 5-8, Appendix Iii
Notes:
Floorspace Requirement - Average sales density assumed to be £11,076/sq m (@ 2021) based on the average sales density of all grocery operators - derived by GlobalData.com.
Allows for increased turnover efficiency.
2018 Prices

1.4.10 When floorspace capacity is assessed on a district-wide basis, there is assessed to currently be minimal floorspace capacity (100sqm) which is set to reduce to nil from 2026.

1.5 Potential Capacity for Future Comparison Goods Floorspace

1.5.1 Turning to comparison goods capacity, it is first important to note that our methodology deviates from that which has been deployed in respect of convenience goods for two principal reasons. Firstly, it can be extremely difficult to attribute an appropriate benchmark turnover to existing comparison goods provision. Secondly, there tends to be greater disparity between the trading performance of apparently similar comparison goods provision depending on its location, the character of the area, and the nature of the catchment. As a consequence, we adopt the approach with comparison goods floorspace that it is trading 'at equilibrium' (i.e. our survey derived turnover estimate effectively acts as benchmark) at 2021.

1.5.2 We assume that there is therefore no quantitative need for any additional floorspace across the study area at 2021. For the purpose of our initial quantitative modelling exercise, given the current economic challenging retail climate, it has also been assumed that the future performance of comparison goods facilities in Cannock Chase will be commensurate with their current market share. Our assessment also takes into consideration the fact that the town centres, retail parks and other standalone large format retail units will attract some custom from outside the Study Area.

1.5.3 In order to ascertain the likely need for additional comparison goods floorspace within each town, we consider them independently and identify their market share below. We have taken into account relevant comparison goods retail commitments in the retail capacity assessment. Details of the commitments/planning permissions have been provided by the Council and are provided in the capacity tables at **Appendix Jiii**.

1.5.4 The comparison goods expenditure/floorspace capacity figures for the 3 town centres , are summarised in Figure 1.7 below. As previously noted in paragraph 1.4.6, the expenditure and floorspace capacity figures identified for each year are not cumulative figures. They represent the capacity between the base year (2021) and the year identified and should not be added together.

1.5.5 The assessment identifies that Cannock, before any commitments are taken into account, 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 is no resultant capacity for additional floorspace in the short, medium or long term in Cannock

Figure 1.7: Quantitative Need for Comparison Goods Floorspace

Year	Surplus Expenditure £m	Floorspace Requirement (sq. m net)
Cannock		
2021	-	-
2026	6.9	1,100
2031	3.0	400
2036	7.8	900
2040	15.9	1,700
Rugeley		
2021	-	-
2026	-0.3	-
2031	-1.4	-
2036	-0.7	-
2040	0.8	<100
Hednesford		
2021	-	-
2026	-0.1	-
2031	-0.5	-
2036	-0.3	-
2040	0.3	<100
District-Wide		
2021	-	-
2026	-2.0	-
2031	-8.7	-
2036	-4.2	-
2040	5.1	500

Source: Appendix Jiii
Notes:
Allows for increased turnover efficiency.
2018 Prices

1.5.6 For Rugeley and Hednesford, there is assessed to be no capacity in the short to medium term with a very minimal amount (<100sq m) identified for each town at 2040.

1.5.7 When the district-wide comparison goods capacity is assessed, a similar picture is apparent. A limited amount of surplus expenditure (£5.1m) is identified at 2040. Again, after taking into account the Designer Outlet West Midlands scheme, this capacity is assessed to be absorbed.

1.6 Summary

1.6.1 The above assessment identifies that by 2031 (the minimum timeframe identified by the NPPF when allocating sites), there is assessed to be nil convenience goods capacity in Cannock or Rugeley. In contrast, there is estimated to be floorspace capacity of 1,000sq m is identified for Hednesford.

1.6.2 In terms of comparison goods capacity, there is assessed to be no/very minimal floorspace capacity in the District to 2031 and beyond. This is primarily due to the large West Midlands Designer Outlet at Mill Green which is due to open in early 2021.

Appendices

Appendix Ii: Population and Retail Expenditure

Appendix Iii: Statistical Tables – Convenience Goods Retail Capacity

Appendix Iiii: Statistical Tables – Comparison Goods Retail Capacity