

Bromsgrove District Council **Planning and Regeneration**

Town Centre Health Check



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Bromsgrove
District Council

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1. Introduction

- 1.1 The National Planning Policy Framework (NPPF) was published in March 2012 and supersedes guidance contained in Planning Policy Statement 4 'Economic Development' (PPS4). One of the purposes of the planning system is to contribute to the achievement of sustainable development by contributing to building a strong, responsive and competitive economy, by ensuring that sufficient land of the right type is available in the right places and at the right time to support growth and innovation; and by identifying and coordinating development requirements, including the provision of infrastructure.
- 1.2 The Government is committed to securing economic growth in order to create jobs and prosperity, building on the country's inherent strengths, and to meeting the twin challenges of global competition and of a low carbon future. The Government is committed to ensuring that the planning system does everything it can to support sustainable economic growth. Planning should operate to encourage and not act as an impediment to sustainable growth. Therefore significant weight should be placed on the need to support economic growth through the planning system. To help achieve economic growth, local planning authorities should plan proactively to meet the development needs of business and support an economy fit for the 21st century.
- 1.3 The NPPF expands on economic development and devotes a chapter to 'Ensuring the vitality of town centres'. This chapter states that planning should promote competitive Town Centre environments that provide customer choice and a diverse retail offer and which reflect the individuality of the Town Centre. Town Centres should be recognised as the heart of the community and their viability and vitality supported. Suitable sites should be allocated to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in the Town Centre. Where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.

Town Centre Health Checks

- 1.4 This Health Check updates key elements from the previous study published in December 2012, which was produced by the Strategic Planning Team within Bromsgrove District Council. To provide continuity and the opportunity for comparisons to be drawn, attempts have been made to use data sources compatible with the studies completed in 2009, 2010 and 2011.
- 1.5 The main purpose of this town centre health check is to monitor the vitality and viability of Bromsgrove Town Centre. Although PPS4 has been deleted regarding the methodology for health check process and identifying indicators, the accompanying practice guidance on 'Planning for Town Centres' still exists, detailing the benefits of regular auditing and monitoring of town centres. The useful indicators for Health check monitoring that were

established as part of PPS4 will continue to be used by Bromsgrove District Council in order to compare data from previous year's studies. This report will be used to inform the review of site allocations and town centre policies, particularly the emerging District Plan. The report also enables early signs of change of town centres to be identified and informs the type of action that should be taken.

- 1.6 It is a prerequisite for any town centre strategy to have a clear understanding of the scale and quality of existing provision of retail and other key town centres uses; the network and role of different centres; and their vitality and viability and how it has changed over time. The Practice Guidance 'Planning for Town Centres' sets out how Town Centre 'health checks' can be used to measure vitality and viability.
- 1.7 One of the key objectives of regular monitoring and town centre health checks (in addition to providing important baseline data for retail/town centre assessments) is to consider a centre's performance over time. It will also be relevant to consider how the centre has performed relative to national trends, and to similar sized centres elsewhere. This type of analysis provides an important insight into whether the centre is improving, stable or declining, and will have a bearing when considering the potential/need for new development and the likely impact of new developments.
- 1.8 Retailing and leisure are particularly dynamic sectors, and a range of factors, including economic and social trends and new technology can have a significant impact on the current and future role of existing centres and the scope for new ones. These factors need to be taken into account when considering future needs, identifying sites and strategies, and assessing the impact of new development. However, it is also relevant to consider long term trends and to provide robust, policies to provide investor confidence and certainty given the complexity and scale of many town centre development projects.

Data Collection

- 1.9 The report is divided into two parts. The first part gives an overview on Bromsgrove in terms of the local economy, economic performance, the population and workforce, the labour market and the labour and property markets. Data is collected via desktop surveys such as online data from the Office of National Statistic (ONS), the Valuation Office Agency (VOA), Worcestershire County Council, West Midlands Regional Observatory Property Mall Control Panel's websites and also the Bromsgrove's Annual Monitoring Report.
- 1.10 The second part of the report covers the town centre health check indicators. In order to measure the vitality and viability and monitor the health of town centres over time and inform judgements about the impact of policies and

development, local authorities should also regularly collect market information and economic data, preferably in cooperation with the private sector.

1.11 The NPPF does not require Town Centre Health Checks to be undertaken, however, it does emphasise the need for local authorities to monitor the health of their town centres and determine how they are changing over time and includes a section called “Business and Economic Development”. However, as mentioned previously, PPS4 and its accompanying practice guidance remains the only and most recent policy guidance specifically targeted towards town centres and as such therefore, this health check process has been assessed based on those same core principles in line with other assessments throughout the country. PPS4 regarding the types of evidence and indicators Local Authorities should collect still provide a relevant and useful basis to measure both the health of the centres and the potential future impact of proposed retail and other centre floorspace uses in the District. In line with the health checks conducted since 2009, the following key indicators are used:

- Diversity of uses;
- Amount of retail, leisure and offices in edge and out-of-centre locations;
- The potential capacity for growth;
- Retailer representation;
- Shop rents;
- Proportion of vacant street level property;
- Pedestrian flows;
- Accessibility;
- Perception of safety / occurrence of crime;
- Environmental quality.

2. Spatial Portrait

- 2.1 Bromsgrove District is situated in north Worcestershire lying to the south west of the West Midlands conurbation. The District is bounded by Birmingham, Dudley, Solihull, Redditch, Wyre Forest, and the largely rural districts of Wychavon and Stratford-on-Avon. The District covers approximately 21, 714 hectares. Although located only 22km (14 miles) from the centre of Birmingham, the district is predominantly rural with approximately 91% of the land designated Green Belt.
- 2.2 The area is well served by motorways, with the M5 running north to south and the M42 from east to west. The M5 and M42 connect with the M6 to the north of Birmingham and the M40 to the east. The District also benefits from train and bus connections into Birmingham City Centre.
- 2.3 The main centres of population in Bromsgrove District are Bromsgrove town, Catshill, Hagley, Rubery and Wythall. Development pressures are high due to the District's proximity to the Birmingham conurbation and the motorway and railway connections, which adversely puts pressure on the Green Belt.
- 2.4 There are a number of shopping locations in the District catering largely for the day to day needs of residents. These shopping locations are in Alvechurch, Barnt Green, Aston Fields, Catshill, Hagley and Wythall. The main exceptions are Bromsgrove town and Rubery. The latter, on the southern fringe of Birmingham, serves as a suburban shopping area; the former evolved as a market town serving a wide and predominantly rural hinterland although its present attractions are limited and disadvantaged by the greater range and size of stores and facilities in neighbouring centres such as Birmingham, Worcester, Redditch, Solihull and Merry Hill.

National Trends

- 2.5 Modern consumer behaviour in the UK has become far more complex in recent decades. People are increasingly shopping in different ways, buying from a variety of different channels and locations dependent on where we are in the day and what we are doing. Buying patterns are also driven by convenience (does it fulfil the need at the time, and does it save some time?). There is now a diversity of shopping opportunities; whether it is locally, town centres, out-of-town, service stations, online, TV shopping, mobile shopping, travel locations or many more places, the choices are increasing all the time.
- 2.6 However as time has progressed, having such a choice with retail growth slowing, or in the case of non-food declining, means that not all these

locations and channels are necessarily profitable. The challenge for the retailer is to provide the choice of multi-channel shopping, but to make sure that overall it is a profitable model. Shopping has become more fragmented as people go out-of-town infrequently for major shopping, top-up locally and in fill on the move as well as order online. Technology has been a key driver of this change. The internet has become far more accessible, even more so with the arrival of more user-friendly devices, such as smartphones, tablets and iPads. New technology is also providing an array of payment methods, which will expand so we will have cash, credit, cards, online, mobile touch, and more.

- 2.7 Experian's (2012) report entitled 'Town Centre Futures 2020' sets out how the UK's town centres will have changed by the end of the decade and what town centres, high streets and retailers need to do to survive and thrive. Though facing tough challenges Experian's report stresses that the UK's town centres can survive and thrive beyond 2020, provided they understand and cater to the distinct needs of their local communities, while embracing technology to boost the high street experience.
- 2.8 Retailers will have to compete harder in order to counter the increase in online shopping. Town centres in particular will need to market themselves as convenient hubs for picking up products ordered online if they are to thrive into the next decade, whilst at the same time, they must cater for an ageing population, it adds, calling for them to focus on face-to-face service and opportunities for socialising and leisure activities. Experian predicts that in 10 years' time there will be three million more people in the UK over the age of 70, and in order to thrive, town centres will need to offer the kind of facilities valued by older people, such as health services, and safe and accessible shopping areas. Town centres must fulfil the modern need for convenience and value of those with increasingly limited resources and incomes, but at the same time it must not be to the detriment of quality and service sought by older and more affluent consumers.
- 2.9 The Experian report also highlights that town centres will also need to embrace technology to enrich the shopping experience by combining online shopping with the often more convenient option of collecting goods in the town centre. More shops will need to adopt "click and collect" and retailers should embrace mobile commerce and social media to develop their online presence as the increase in technology and social media will have an impact everywhere. The report also highlighted that in many cases, these shoppers are from hard-pressed and rural consumer groups that are looking for both the choice and value that online offers and heavily influencing the health of town centres.
- 2.10 The vitality and viability of any town or service centre is dependent not only on its shopping offer but also on the mix of uses which add to the experience and make the centre more attractive to those who live, work and visit there. Offices can generate lunchtime and top-up shopping trips whilst leisure and entertainment facilities, cafes, bars and restaurants add variety and can assist in promoting the evening economy. Educational establishments can also add

to the number of young people in the centre during the week contributing to vibrancy.

- 2.11 The NPPF requires local authorities to ensure that planning policies are based on adequate and up-to-date evidence. It states that it should be used to assess the role and function of town centres and the relationship between them, including any trends in the performance of centres (Para. 161). Therefore, it is good practice to have up-to-date information on the buoyancy of town centres, particularly now, as the country is in recession and at a time when the retail sector is changing, perhaps fundamentally, particularly because of the growth of internet shopping. Nationally, the retail sector appears to be in decline, with rising vacancy rates and retailers going into administration a regular topic in the news. The government and other organisations have focussed attention on town centres. Of note is the Portas Review (2011) which identified 28 recommendations for improving town centres, most of which were accepted by the government.
- 2.12 This health check research contributes to ensuring that the District Plan evidence base relating to this subject is up-to-date and that information is available to assist in monitoring the effectiveness on both planning policies and inform economic development objectives and initiatives. The Council has undertaken or commissioned several research reports which are relevant to the Town Centre, including the CBRE retail capacity report which forecasts the need for retail floorspace in the District. The Council carries out housing and employment surveys annually, and reports on key indicators in the Authority's Monitoring Report.

Bromsgrove Town Centre Regeneration Programme

- 2.13 The Bromsgrove Town Centre Regeneration Programme is backed by a public sector partnership of Worcestershire County Council, Bromsgrove District Council, Worcestershire Primary Care Trust, Herefordshire and Worcestershire Fire and Rescue Service and West Mercia Constabulary. The objective is the regeneration and revitalisation of the town centre of Bromsgrove by creating an attractive and vibrant centre at the heart of a thriving market town.
- 2.14 The regeneration programme covers a wide range of work streams and actions that include statutory planning, such as the emerging District Plan, building of new public buildings, private developments, the refurbishment of the high street and pedestrian areas of the town centre, highway works, economic development initiatives, community involvement programmes, marketing of the town, other activities to do with themes such as; transport; health and well-being; young people; better environment etc.
- 2.15 All of these activities, communications, works, developments and soft projects have their own interdependencies and simultaneous timetables. Many of the key points in the programme have already been identified although not all of the actions, activities, work streams and discrete projects within the overall

regeneration programme are ready to be defined in detail at this stage. This will be done by appraisal, studies and surveys as the programme progresses.

2.16 Effective programme and project management, strong partnership working and community engagement are all fundamental to the success of the regeneration programme the intention of which is to realise four strategic aims:

- ***A new revitalised town centre environment***, including:
 - Upgrading the public realm and resurfacing & refurbishing the High Street.
 - Preserving and enhancing the Conservation Area's character and appearance.
 - Wherever viable renovating, refurbishing, rejuvenating or redecorating the Town Centre's historic buildings.

- ***A thriving and more diverse economy***, including:
 - An improved Retail Offer with the development of new stores; a major new supermarket and redevelopment of the market hall site
 - An expanded and varied Evening Economy
 - New town centre housing and offices

- ***New multi-agency public service facilities***, including:
 - New Public Toilets
 - New Health Centre
 - New Police Station & Fire Station
 - New Library / Contact Centre (Hub)
 - New Joint County & District Administrative Quarter
 - New Leisure Centre
 - Review of facilities in the Recreation Road area

- ***An improved Transport Infrastructure***, including;
 - Reviewing requirements for modernising the transport infrastructure
 - A review of car parking requirements in the town centre
 - Re-engineering of road junctions and traffic flows
 - Improved pavements, footpaths and cycle routes
 - New or upgraded bus station
 - Links to the New Railway Station

2.17 The Bromsgrove Town Centre Regeneration Programme is therefore intended to link these various aims and coordinate their resolution. This will be done across a partnership of different public sector bodies and in conjunction with the community and third sector organisations as well as private sector businesses.

2.18 The emerging Bromsgrove District Plan will be vital during this regeneration process as there is a policy dedicated to the Town Centre. It looks to develop retail, housing and employment opportunities, as well as improve the public realm and transport links in and around the Centre. The policy also addresses

the natural environment, promoting the naturalisation of the Spadesbourne Brook. There are also ten development sites identified within Bromsgrove Town Centre to provide a stimulus for regeneration. Some are currently coming forward for developments and other sites currently being marketed present a medium to long term opportunity for the plan period 2011 to 2030.

3. Bromsgrove Overview

3.1 The economic structure of a District, County or Region provides useful evidence for development plans and development management. The following information provides an overview on the economy, economic performance, the population and workforce and the labour market in Bromsgrove, Worcestershire and the West Midlands.

Economy

3.2 Employment by Broad Sector: The number of businesses in the West Midlands and the associated turnover in different industries in relation to other business across the United Kingdom provides an indication of the regional economic structure. According to 'UK Business: Activity, Size and Location - 2012' (ONS, 2012) in the West Midlands, 17.3% of the businesses are in wholesale and retail trade, 12.2% in professional, scientific and technical roles, 10.3% in construction, and 8.7% in health and education. In Bromsgrove itself the business make-up consists of 12.7% of the businesses are in wholesale and retail trade, 15.6% in professional, scientific and technical roles, 13.6% in construction, and 7.9% in health and education. There are more details on specific industries in table 1.

Industry	Bromsgrove	Worcestershire	West Midlands	UK
Agriculture, forestry & fishing	4.1	6.8	5.6	5.4
Production	5.8	7.5	7.8	5.8
Construction	13.6	11.0	10.3	10.5
Motor trades	3.9	3.7	3.5	3.0
Wholesale	4.5	5.6	5.5	4.8
Retail	8.2	10.2	11.8	11.0
Transport & storage	2.4	3.0	3.8	3.2
Accommodation and food services	5.1	5.6	5.9	6.4
Information & communication	6.5	5.3	4.9	6.1
Finance & insurance	2.7	2.2	2.3	2.5
Property	5.0	3.7	3.4	3.5
Professional, scientific & technical	15.6	13.6	12.2	14.2
Business administration & support services	8.0	7.3	6.9	6.9
Public administration & defence	0.4	0.8	1.0	1.0
Education	2.4	2.5	2.8	2.6
Health	5.5	4.9	5.9	5.8
Arts, entertainment, recreation & other services	6.4	6.3	6.4	7.0

3.3 Business Size: The majority of businesses across the West Midlands are small medium enterprises (SMEs) which have less than four employees, totalling to 74.9% of all businesses in the region. Similarly 78.1% of businesses within Bromsgrove are made up of four or less employees. Although a small proportion of West Midlands businesses (5.4%) have over

twenty employees, they would employ a large proportion of the workforce, especially as 1.0% of business has over 100 employees. Bromsgrove only has 4.6% of its businesses employing over 20 people and also 1.0% with over 100 employees (ONS, 2012).

- 3.4 VAT Registrations and De-registrations: Are the best official guide to the pattern of business start-ups and closures. They are an indicator of the level of entrepreneurship and of the health of the business population in the District. Enterprise is a key driver of economic growth. Increases in the number of firms increase the output capacity of the economy. A widely used measure is the number of new VAT registrations as a ratio of the population. Enterprise, as measured by the number of new VAT registrations per 10,000 of the total population is higher in Worcestershire than both the regional and the national averages. In 2006 the rate was 34 per 10,000 compared to 28 per 10,000 for the Region.
- 3.5 In 2007, Bromsgrove District had significantly more registrations than de-registrations, indicating economic growth. The percentage of registrations was almost equal to the national and above regional levels, which implied that the business economy was relatively strong.

	Bromsgrove	Bromsgrove	West Midlands	Great Britain
Registration	390	10.0%	9.4%	10.2%
Deregistration	250	6.4%	7.2%	7.3%
Stock (at end of year)	3,705	-	-	-

Source: BERR - VAT registrations/deregistrations by industry (2007)

- 3.6 Enterprise Births and Deaths: It is important to highlight that there are a number of micro-businesses in Worcestershire that are not yet at the level where they can register for VAT and are therefore not accounted for in these figures. However there is a need to support these businesses, ensuring that they develop and grow, thereby laying the foundation for future job creation.

Area	2006	2007	2008	2009	2010	% change 2009-10
Bromsgrove	475	515	470	390	405	3.8
Worcestershire	2,615	2,730	2,435	2,015	2,175	7.9

Table 3: Count of births of new enterprises, 2006-10

Area	2006	2007	2008	2009	2010	% change 2009-10
West Midlands	21,025	22,805	20,585	18,245	17,805	-2.4
England	225,120	246,700	236,345	209,035	207,520	-0.7

Source: ONS (2012) Business Demography (2010)

3.7 The number of enterprises closing has risen in the county with an increase of 5% when compared to 2009. Although the proportion of enterprise closures has continued to increase in 2010, it is of a significantly lower magnitude than in 2009 when there was an increase of 37%. The most notable increase in 2010 was in Bromsgrove where there was a rise of around 11%. The number of enterprise deaths in the county increased by a similar proportion to the West Midlands and England.

Table 4: Count of deaths of enterprises, 2006-10

Area	2006	2007	2008	2009	2010	% change 2009-10
Bromsgrove	350	410	375	470	520	10.6
Worcestershire	2,040	2,205	2,040	2,660	2,795	5.1
West Midlands	17,105	18,980	18,080	23,060	24,230	5.1
England	182,800	199,300	196,695	246,630	261,880	6.2

Source: ONS (2012) Business Demography (2010)

3.8 Unemployment & Economic Activity Rate: Unemployment gives background on the scope for economic development opportunities. It needs to be in the context of the qualification and skills of a potential workforce. As of April 2013, the overall unemployment level in Bromsgrove is 4.9%, compared with 8.8% regionally (West Midlands) and 7.8% nationally. This is favourable to last year where the unemployment level in Bromsgrove was 6.1%, 9.1% regionally and 8.1% nationally.

Table 5: Employment and unemployment, April 2012 to March 2013

	Bromsgrove (%)	West Midlands (%)	Great Britain (%)
Economically Active	81.9	75.2	77.1

In employment	78.2	68.4	70.9
Un-employed	4.9	8.8	7.8

Source: ONS annual population survey (2013)

- 3.9 The Jobseeker's Allowance (JSA) is payable to people under pensionable age who are available for, and actively seeking, work of at least 40 hours a week. Table 6 indicates the total number of JSA claimants in Bromsgrove compared to the County and Region. There are less people claiming JSA compared with last year. In June 2012 there were 1,268 (2.2%) of Bromsgrove's population being paid JSA, which was more than the 1,106 (1.9%) in 2013.

	Bromsgrove (numbers)	Bromsgrove (%)	Worcestershire (%)	West Midlands (%)	Great Britain (%)
All people	1,106	1.9	2.6	4.3	3.5
Males	734	2.5	3.4	5.5	4.5
Females	372	1.3	1.7	3.0	2.4

Source: ONS (2013)

Economic Performance

- 3.10 Gross Value Added (GVA): measures the contribution to the economy of each individual producer, industry or sector in the United Kingdom and is a headline measure used to monitor economic performance. GVA is a measure of productivity of the economy and denotes estimates that were previously known as gross domestic product (GDP) at basic prices. While GDP measures the total expenditure on final goods and services produced in the domestic economy, GVA measures production and income. Under the European System of Accounts 1995, the term GDP is equal to GVA plus taxes on products (less subsidies on products), i.e. at market prices. GVA is published as five year moving averages to smooth out year-on-year fluctuations.
- 3.11 Put simply Gross Value Added is the value of goods and services produced by an area, sector or producer minus the cost of the raw materials and other inputs used to produce them. GVA is mainly composed of the income made by employees (earnings) and the business (profits/surplus) as a result of production. Hence, GVA data are workplace-based and should be seen as a measure of the economic output of an area rather than its wealth.

- 3.12 GVA per resident head in Worcestershire was £16,074 compared with £17,044 in the West Midlands and £19,951 in the UK. In the West Midlands there is a productivity gap of £15bn i.e. if the GVA per resident head in the West Midlands was the same as in the UK, the West Midlands would be contributing £15bn more to the economy.
- 3.13 Although GVA has increased over time both the West Midlands and Worcestershire are decreasing in comparison to the UK. To make the Worcestershire economy stronger and to close the widening gap attention needs to be focused on improving the skill levels of the population and encouraging and supporting new business creation. However it is important to note that a lack of available employment land in the county could be a limiting factor in increasing GVA per resident head (Worcestershire County Council, 2012).

The Population and Workforce

- 3.14 Qualifications: The percentage of the population that has achieved different levels of qualification and that are employed in different jobs can be used to give a background of the potential workforce of an area. The population in Bromsgrove on average has higher levels of qualification than the county and regional average, in particular the higher qualification level - Level 4 and above. Table 7 below also indicates there are a smaller percentage of Bromsgrove's population with no qualifications when compared both regionally and nationally.

	Bromsgrove (numbers)	Bromsgrove (%)	Worcestershire (%)	West Midlands (%)	Great Britain (%)
NVQ4 and above	18,800	33.7	32.5	27.8	34.4
NVQ3 and above	32,500	58.2	53.4	48.4	55.1
NVQ2 and above	43,400	77.9	72.1	66.6	71.8
NVQ1 and above	50,900	91.3	83.4	79.5	84.0
Other qualifications	#	#	6.9	6.9	6.3
No qualifications	#	#	12.2	13.6	9.7

Sample Size too small for reasonable estimate

Source: Office of National Statistics (2013)

- 3.15 Occupations: In line with the achievement of higher qualifications, the occupation groups breakdown shows that Bromsgrove also has a higher percentage of managers, senior officials and professionals (38.0%) than Worcestershire (32.5%), the region (27.1%) and the national (29.5%) average, whereas it has a lower percentage of people in elementary occupations, sales and customer service occupations and process, plant and machine operatives. There was also an increase since the 2012 figures, there was an rise in managers and senior officials across Bromsgrove from 5,000 (12.3%) to 7,700 (16.8%) since last years' figures. Although there was a slight reduction in professional occupations from 9,900 (24.2%) to 9,700 (21.2%), and associate professional and technical positions from 6,100 (14.8%) to 6,000 (13.2%) over the same time frame.

Table 8: Employment by occupation (April 2012 - March 2013)

	Bromsgrove (numbers)	Bromsgrove (%)	Worcestershire (%)	West Midlands (%)	Great Britain (%)
Managers and senior officials	7,700	16.8	12.9	9.8	10.1
Professional occupations	9,700	21.2	19.6	17.3	19.4
Associate professional & technical	6,000	13.2	14.5	12.0	14.1
Administrative & secretarial	5,200	11.4	9.4	10.8	10.9
Skilled trades occupations	6,200	13.5	9.7	11.6	10.5
Caring, leisure and other service occupations	#	#	9.3	9.3	9.0
Sales and customer service occupations	#	#	8.2	8.4	8.1
Process plant & machine operatives	#	#	6.4	7.9	6.3
Elementary occupations	#	#	9.3	11.8	10.9

sample size too small for reasonable estimates

Source: ONS (2013)

3.16 Population: The 2011 Census shows that Bromsgrove District has a resident population of 93,637, which is only an increase of 237 on the estimated figure. The number of children (aged 17 or below) is 19,019 which is a decrease of 93 between 2001 and 2011 and represents 20.4% of the total population. Over the same time period, there were 19,135 aged 65 and over living in the District, almost 20.4% of the total population. The number of people aged 65 and over has risen by about 3,989, representing a 26% increase and the number of people in the 18-64 age groups has increased by 1,904 over the same time period.

3.17 The population of Bromsgrove is projected to increase by about 6,000 for the period 2011-21(99,637), and by about 12,800 up to 2030 (106,437). The 18-64 age group stays roughly constant over the 2008-30 time period, whilst the 0-17 age group has a projected increase of around 800. The number of persons aged 65-plus is projected to increase by around 11,300.

- 3.18 House Affordability: The housing market in the District has been buoyant in recent years due to its close proximity to the West Midlands conurbation. However, due to the current economic climate house prices have remained the same over the last twelve months, although this is significantly better than the 0.1% fall last year, and 2.3% fall in 2011 and 13.6% the year before that. Despite these decreases, house prices are still relatively high compared to the rest of the West Midlands. In March 2013, the average house price across Bromsgrove was £221,534 compared with £156,388 in neighboring Birmingham and £166,729 in Redditch, as well as the West Midlands average of £172,455 (Land Registry, 2013).
- 3.19 As of 2013 (April 2012 - March 2013) a total of 50 (43 net) affordable dwellings were completed compared to 157 the year before. The SHMA (2012) indicates that the analysis of the current need for affordable housing in the authority over the next five years indicates a high demand for this tenure. An annual need of 219 affordable properties is calculated as being required to meet the future needs over the next five years and the existing backlog. This reflects the impact of rising house prices over the first half of the last decade and the continued pressures on wages as well as the availability of mortgage finance. It also reflects the fact that affordable housing makes up a relatively low proportion of the overall stock in Bromsgrove currently, approximately 10%, a proportion which is considerably below the national average of 20%.
- 3.20 The housing supply position in previous years meant it was extremely challenging to achieve a modest target year after year, as there was a total reliance on sites coming forward for 100% affordable housing. This issue should continue to improve since SPG10 was lifted in January 2010. It is clear from the last three years that affordable housing completions are going in a positive direction and this year they accounted for 60% of the new dwellings total achieved across the District. The realisation is that the demand for affordable housing is continuing to increase, and this issue will be addressed in the emerging District Plan, which will strive for 40% affordable housing provision on sites of ten or more dwellings
- 3.21 Housing Targets: Bromsgrove's housing targets are based on the Worcestershire Strategic Housing Market Assessment (February 2012). In total the SHMA suggests that there will be a requirement for between 6,800 and 7,000 dwellings between 2011/12 and 2029/30 to meet the demands generated by new household formation. This requirement factors in the historic supply of new housing between 2006 and 2011. Based on these figures the Council intends to have a housing target of 7,000 dwellings from 2011/12 to 2029/30
- 3.22 Index of Multiple Deprivation: According to the 2010 Indices of Multiple Deprivation Bromsgrove had the highest proportion of Lower Super Output Areas (LSOAs) in the least deprived quintile (47%) across the West Midlands. When compared to the rest of Worcestershire, Bromsgrove District has the

lowest instances of deprivation, and ranks in the bottom quarter of most deprived local authorities across England (280th out of 354 authorities). However, this has seen an increase from the 2007 Indices, whereby Bromsgrove was positioned 299th nationally. Although the majority of the District performs well in terms of deprivation, there are small pockets of deprivation that need to be tackled. There are three LSOAs in the 30% most deprived nationally and the most deprived area in the District is in the northern part of Sidemoor, which is ranked, 8,168th out of 32,482 most deprived areas nationally (DCLG Indices of Multiple Deprivation, 2010).

- 3.23 **Earnings:** Median household incomes in Worcestershire are higher than they are elsewhere in the West Midlands and England. Household incomes are highest in Bromsgrove (£34,492 pa) and lowest in Wyre Forest (£27,821 pa). Household income includes income from employment (earnings) as well as that from other sources, for example investments and savings.

Area	Median Income (£)
Bromsgrove	£34,492
Malvern Hills	£30,218
Redditch	£30,291
Worcester	£29,115
Wychavon	£31,675
Wyre Forest	£27,821
Worcestershire	£30,515
West Midlands	£27,068
England	£29,464

Source: CACI Ltd., Paycheck (2011)

District	Residence based earnings	Workplace based earnings	% Difference
Bromsgrove	£29,552	£20,697	30.0
Malvern Hills	£24,288	£22,411	7.7
Redditch	£21,934	£22,454	-2.4
Worcester City	£26,478	£23,770	10.2
Wychavon	£26,725	£24,345	8.9
Wyre Forest	£20,842	£18,658	10.5
Worcestershire	£25,330	£22,685	10.4

West Midlands	£24,568	£24,550	0.1
England	£26,615	£26,601	0.1

Source: Annual Survey of Hours and Earnings 2011 (ONS, 2012)

- 3.24 As the table above indicates, workplace earnings are lower in general than residence-based earnings across Worcestershire, with the exception of Redditch. The biggest differential can be seen in Bromsgrove where, the average annual earnings of people who work within the District is £20,697 compared with the average annual earnings for residents of Bromsgrove District, which is £29,552, a difference of 30% (ONS, 2012). This would suggest that the District's population earn higher salaries than average, but they earn them in employment locations outside the District. Due to Bromsgrove's close proximity to the MUA, many residents commute to jobs in and around Birmingham. Therefore, it appears that there is an imbalance between the types of jobs and pay available within Bromsgrove compared with the average wages of the population. Industries with higher paid jobs need to be encouraged to stay or locate in the District so as to correct this imbalance and reduce the daily flow of the population to other employment centres which is unsustainable (ONS, 2012)

4. The Survey - Town Centre Health Check Indicators






4.1 In accordance with the NPPF, economic development is defined as development within the B Use Classes, public and community uses, as well as main town centre uses (not including housing development). The NPPF defines main town centre uses as follows:

- Retail development
- Leisure, entertainment facilities, and the more intensive sport and recreation uses
- Offices, and
- Arts, culture and tourism development

4.2 The NPPF states that planning policy should promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. The Government's overarching objective is sustainable economic growth. To help to achieve this, the Government's objectives for planning are to build prosperous communities; reduce the gap in economic growth rates between regions; deliver more sustainable patterns of development and respond to climate change; and to promote the vitality and viability of town and other centres as important places for communities. As detailed in 'Planning for Town Centres' (2009), in order to achieve this, the Government wants:

- new economic growth and development of main town centre uses to be focused in existing centres, with the aim of offering a wide range of services to communities in an attractive and safe environment and remedying deficiencies in provision in areas with poor access to facilities
- competition between retailers and enhanced consumer choice through the provision of innovative and efficient shopping, leisure, tourism and local services in town centres, which allow genuine choice to meet the needs of the entire community (particularly socially excluded groups)

4.3 Government guidance in the form of 'Planning for Town Centres' emphasises the need for local planning authorities to gain a proper understanding of the health of the town centres in their area. Although there was a list by which the health of a town centre should be assessed within PPS4, this has subsequently been deleted. However, these indicators are still regarded as effective criteria in which to assess the health of Bromsgrove Town Centre. As these indicators were used in previous years, comparisons made and a full list of these indicators are highlighted below:

-  Diversity of main town centre uses;
-  The amount of edge / out-of centre retail / leisure floor space;
-  Potential capacity for growth or expansion;
-  Retailer representation and intentions to change representations;
-  Proportion of vacant street level property;

- ✚ Shopping rents and commercial yields on non-domestic property;
- ✚ Land values and the length of time key sites have remained undeveloped;
- ✚ Pedestrian flows;
- ✚ Accessibility;
- ✚ Customer views and behaviour;
- ✚ Perception of safety and crime; and
- ✚ State of the town centre environmental quality.

4.4 The majority of the indicators could be collected and compared with the original Bromsgrove Town Centre Health Check data in 2009 and the subsequent information gained in 2010, 2011 and 2012. However, due to the lack of information available, some of the indicators are less obtainable than others. Some indicators are therefore less detailed than others or not reported on at all. As work progresses on the emerging District Plan, this information may become more readily available. The findings of each indicator are presented below, compared with the last four years results, and summarised as part of a SWOT analysis which highlights the import issues towards the future development of the town centre as part of the conclusion.

Purpose of the Town Centre Health Check

4.5 The Town Centre Health Check is produced for a number of reasons:

- In accordance with “Planning for Town Centres: Practice Guidance on need, impact and the sequential approach” that supports the monitoring of Town Centres;
- It helps assess the success of retail policies within the adopted Bromsgrove District Local Plan;
- It will be used to assist the development of town centre and retail policies within the emerging District Plan;
- To consider the Town Centre’s performance over time
- It helps assist with retail planning and development management in Bromsgrove Town Centre; and
- It helps assist with the ongoing information required for the Townscape Heritage Initiative in the Town Centre.

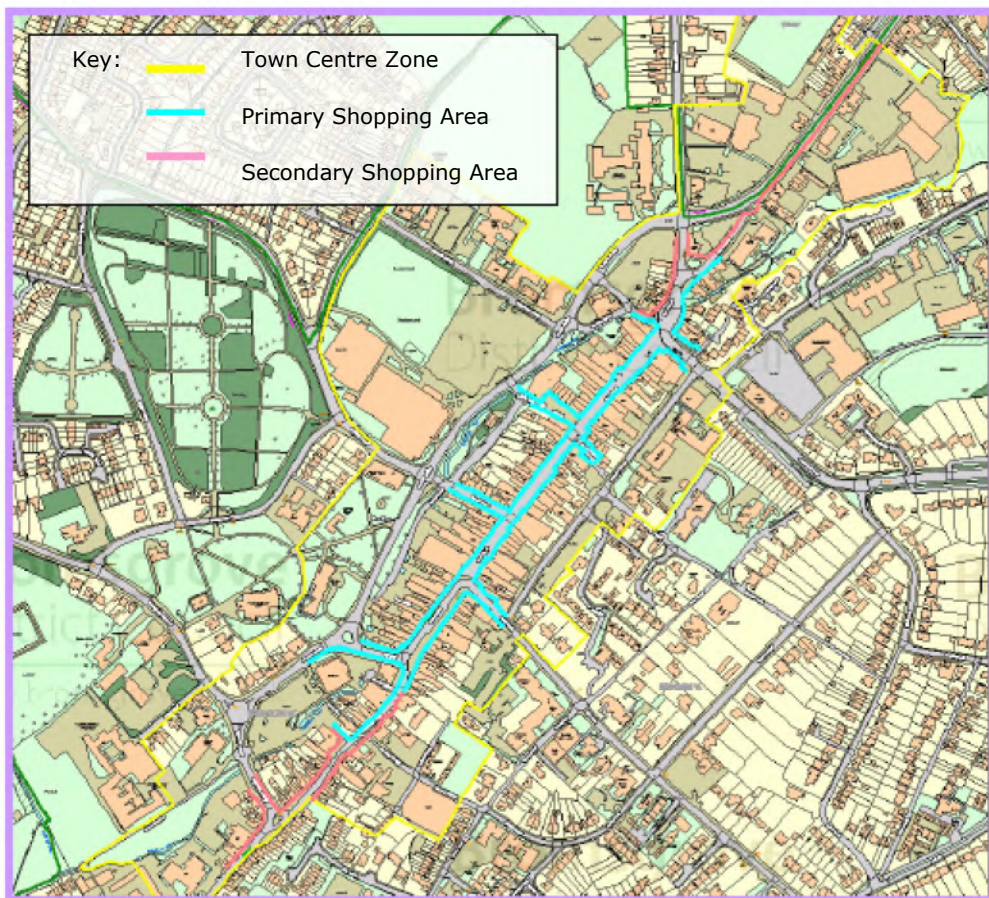
4.6 Town centres are constantly changing and therefore elements of this document will only provide a snap shot in time, for example, the ground floor survey and pedestrian count. However, as the Health Check is updated comparisons can be made with previous years. There are also a number of other benefits this document will offer:

- It allows positive and negative aspects of the town centre to be identified, and in turn regenerated or enhanced;
- It provides data that can be used to make sure that the centre remains competitive with neighbouring centres in the region.
- It provides baseline data for comparative links to be made with future health checks.

Boundaries

4.7 The extent of the town centre surveyed is illustrated on the map below. Principally it covers: Birmingham Road, Chapel Street, Church Street, Crown Close, George Street, Hanover Street, High Street, Market Street, Mill Lane, New Road, St John Street, Station Street, The Strand, Windsor Street and Worcester Road. Although this area is larger than the primary shopping areas and secondary shopping areas identified in the 2004 Local Plan, it is considered important to include the additional areas in order to gain a true picture of the town centre. The Draft Town Centre AAP published in January 2011 proposed extending the primary shopping zone, which will also be reflected in the emerging District Plan, however until adopted this area will remain consistent with the Local Plan.

Fig 1: Town Centre Boundaries



Diversity of Main Town Centre Uses

4.8 The use of all ground floor properties across Bromsgrove Town Centre were recorded in relation to this indicator. There were 348 units surveyed in the Centre at the time of the 2013 summer survey, which was the same number as 2012. Although some units were lost in terms of a change of use to residential, some were also subdivided to create more premises. Residential properties (Use Class C1, C2 and C3) are not recorded in the survey. Records of the survey are attached in Appendix B. It should be noted that entrances that led to properties above or below the ground floor level were not included as they tend not to have a 'frontage'. The two maps below give a pictorial representation of the surveyed area's land use composition (larger maps can be found in Appendix D).

Fig. 2: Town Centres Uses - North

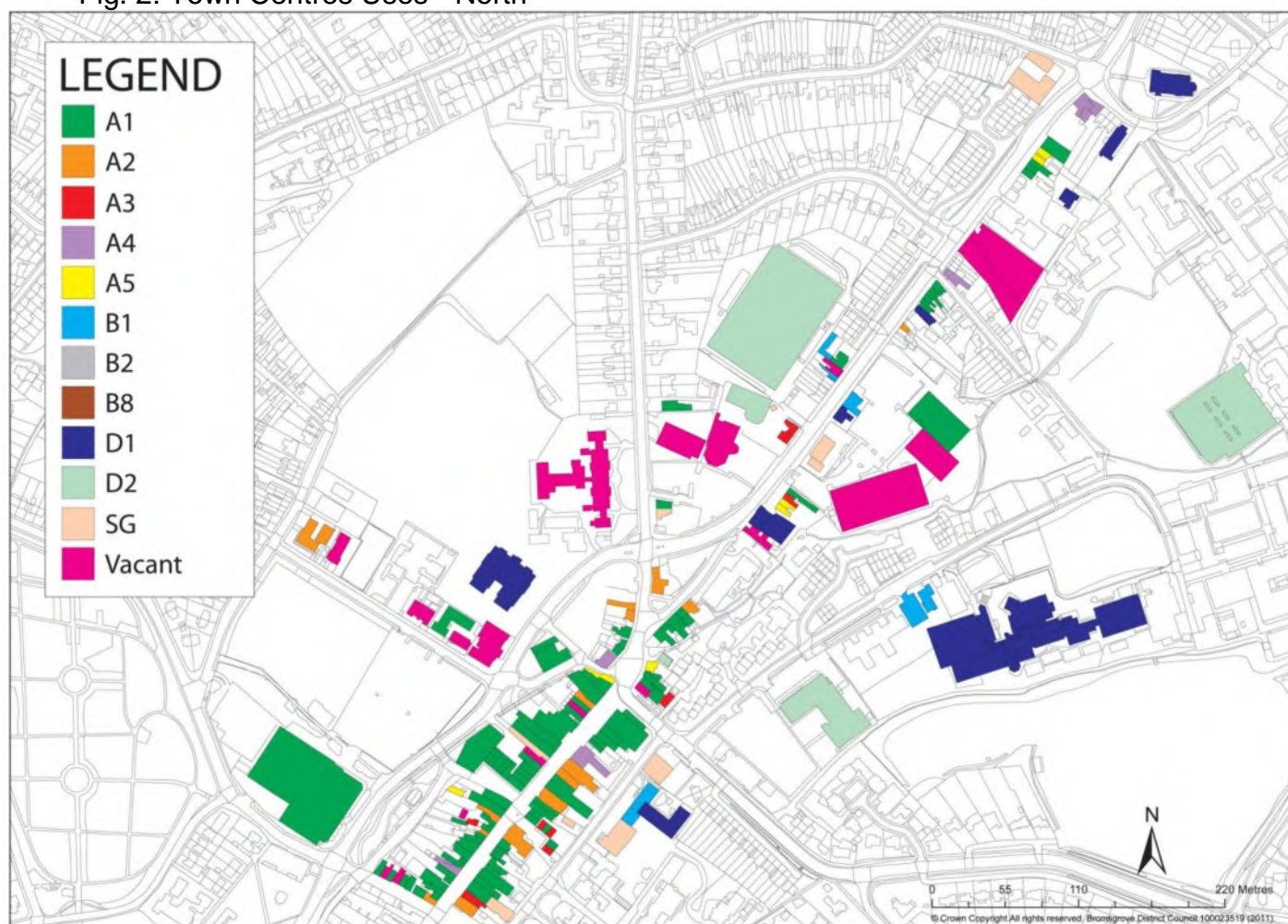
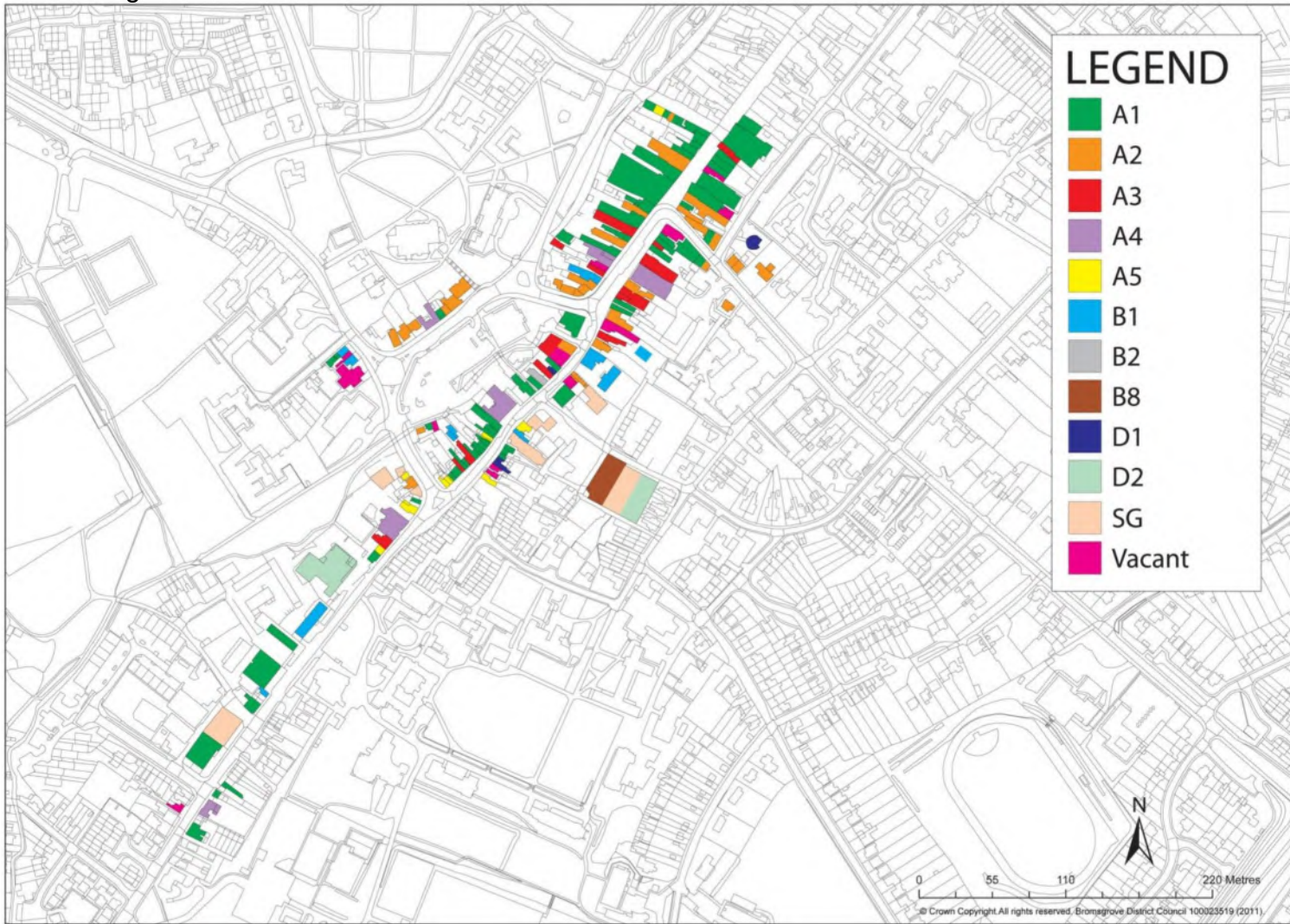


Fig. 3: Town Centre Uses - South

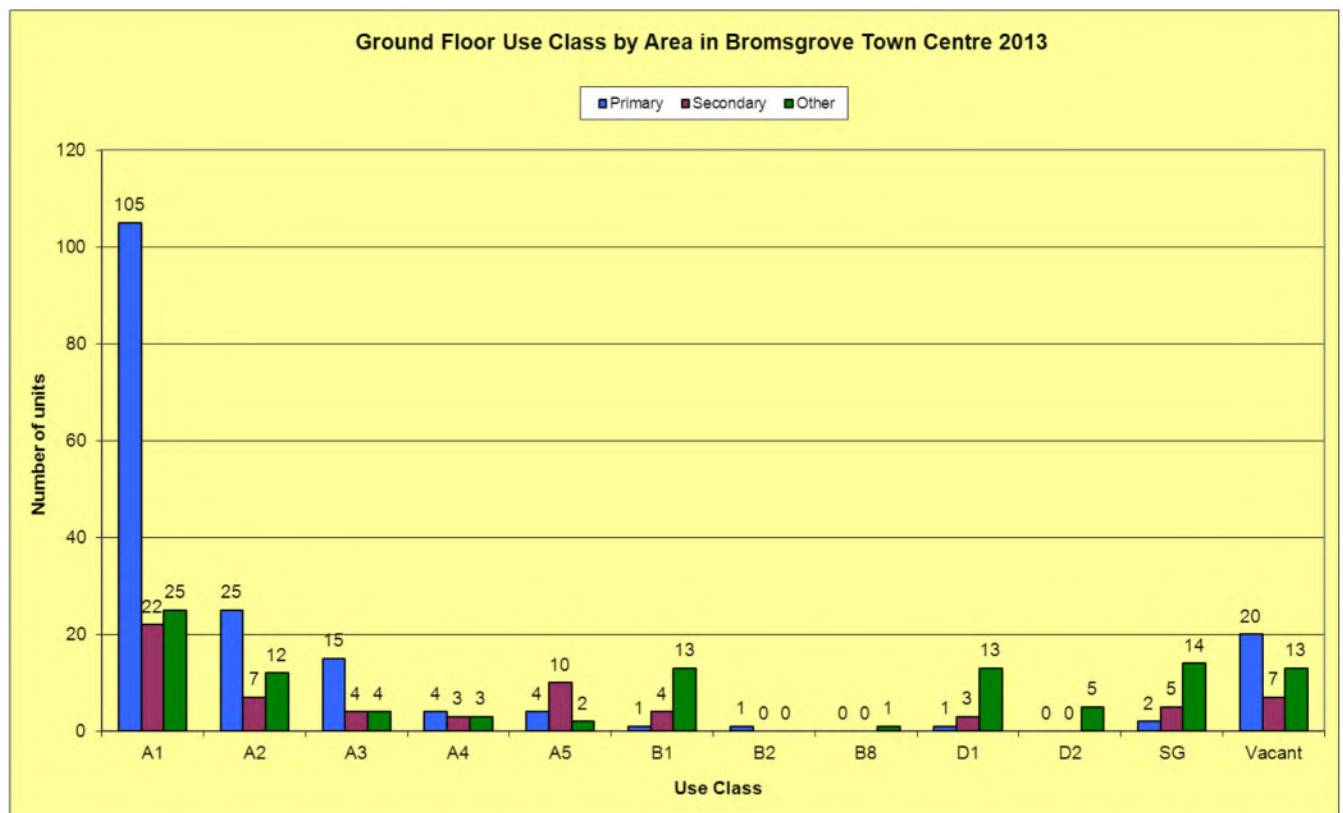


Use Class	Primary	%	Secondary	%	Other	%	Total
A1	105	69.1%	22	14.5%	25	16.4%	152
A2	25	56.8%	7	15.9%	12	27.3%	44
A3	15	65.2%	4	17.4%	4	17.4%	23
A4	4	40.0%	3	30.0%	3	30.0%	10
A5	4	25.0%	10	62.5%	2	12.5%	16
B1	1	5.6%	4	22.2%	13	72.2%	18
B2	1	100.0%	0	0.0%	0	0.0%	1
B8	0	0.0%	0	0.0%	1	100.0%	1
D1	1	5.9%	3	17.6%	13	76.5%	17
D2	0	0.0%	0	0.0%	5	100.0%	5
SG	2	9.5%	5	23.8%	14	66.7%	21
Vacant	20	50.0%	7	17.5%	13	32.5%	40
Total	178		65		105		348

4.9 Among the 348 businesses / vacant units, almost half of the shops are for retail A1 use (43.7.7% / 152 units), followed by A2 financial and professional offices use (12.6% / 44 units) and vacant shops (11.5% / 40 units). The rest are made up of uses with a considerably smaller number of units: A3 restaurants and cafes (6.6% / 23 units), sui generis (6.0% / 21 units), D1 non-residential institutions (4.9% / 17 units), B1 business use (5.2% / 18 units), A5 hot food takeaways (4.6% / 16 units), A4 drinking establishments (2.9% / 10 units), D2 amenity and leisure use (1.4% / 5 units), B2 general industry (0.3% / 1 unit) and B8 storage or distribution (0.3% / 1 unit). This information is recorded in the graph below, indicating the uses in the town centre in terms of which area of the town they are situated.

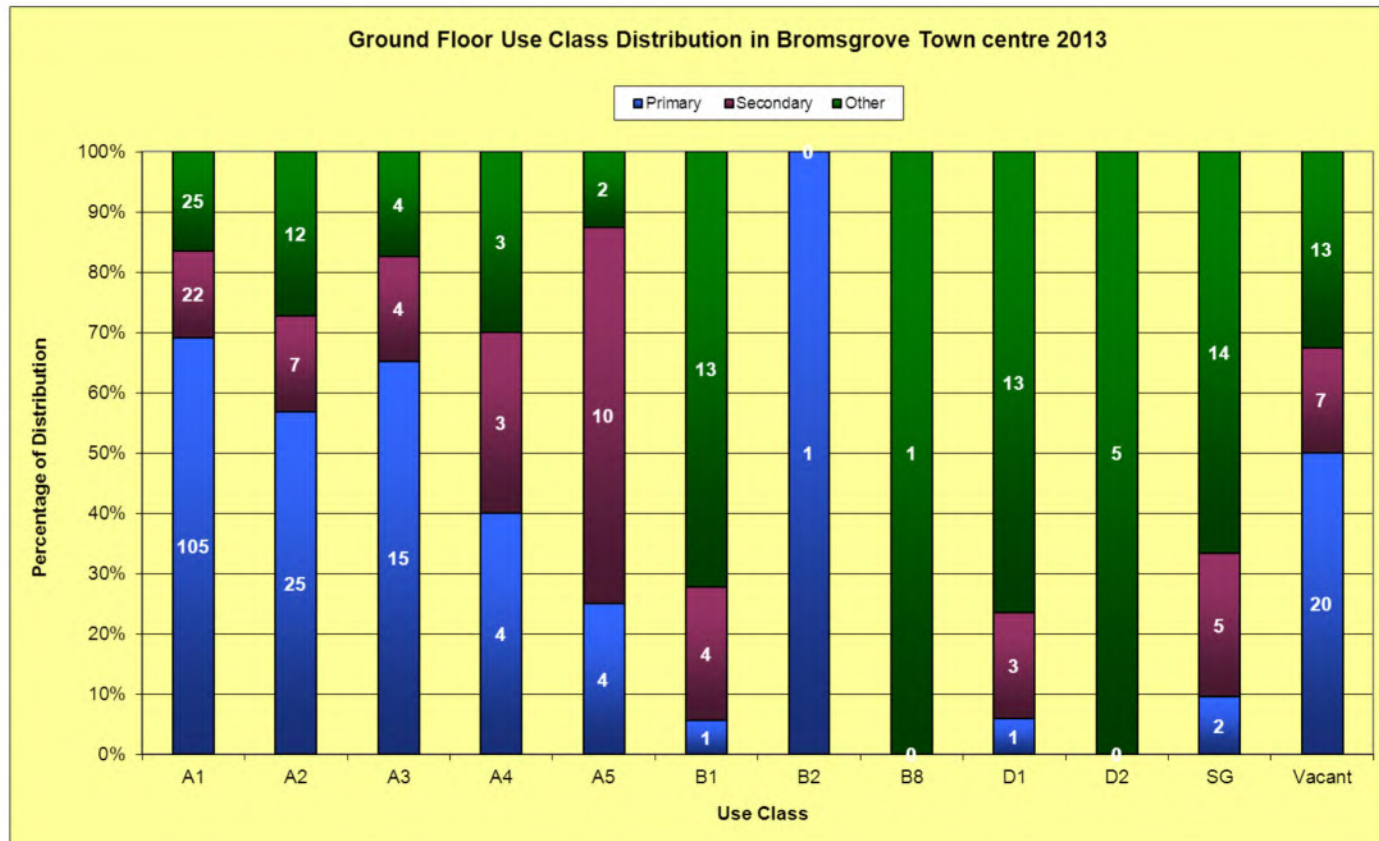
4.10 The 2013 figures have remained fairly consistent with the 2012 ground floor use class survey, with only relatively few changes, some more of concern than others. The number of retail units (A1) has reduced across the town centre by 7 units, with the largest decrease being in the Primary Shopping Zone of 4 units. The number of vacant units has increased for the first time since the Health check was conducted in 2009. There has been an increase from 38 to 40 units, representing 11.5% of all units. Other minor changes from 2012 include the number of A3 units increasing by 1 unit; A5 units increasing by 1; D1 units increasing by 2 and Sui Generis units increasing by 1.

Fig 4: Ground Floor Use Class by Area



4.11 The stacked columns below illustrate the use class by percentage of distribution in the primary, secondary and 'other' areas.

Fig 5: Ground Floor Use Class Distribution



4.12 The graph below (Fig.6) shows how the number of vacant units has changed from 2009. The vacancy rate has decreased year on year until this year where there has been an increase. The reduction reflected positively in terms of town centre regeneration, however, the increase in 2013 should be monitored in future Health Checks.

Fig 6: Vacant Units 2009 to 2013

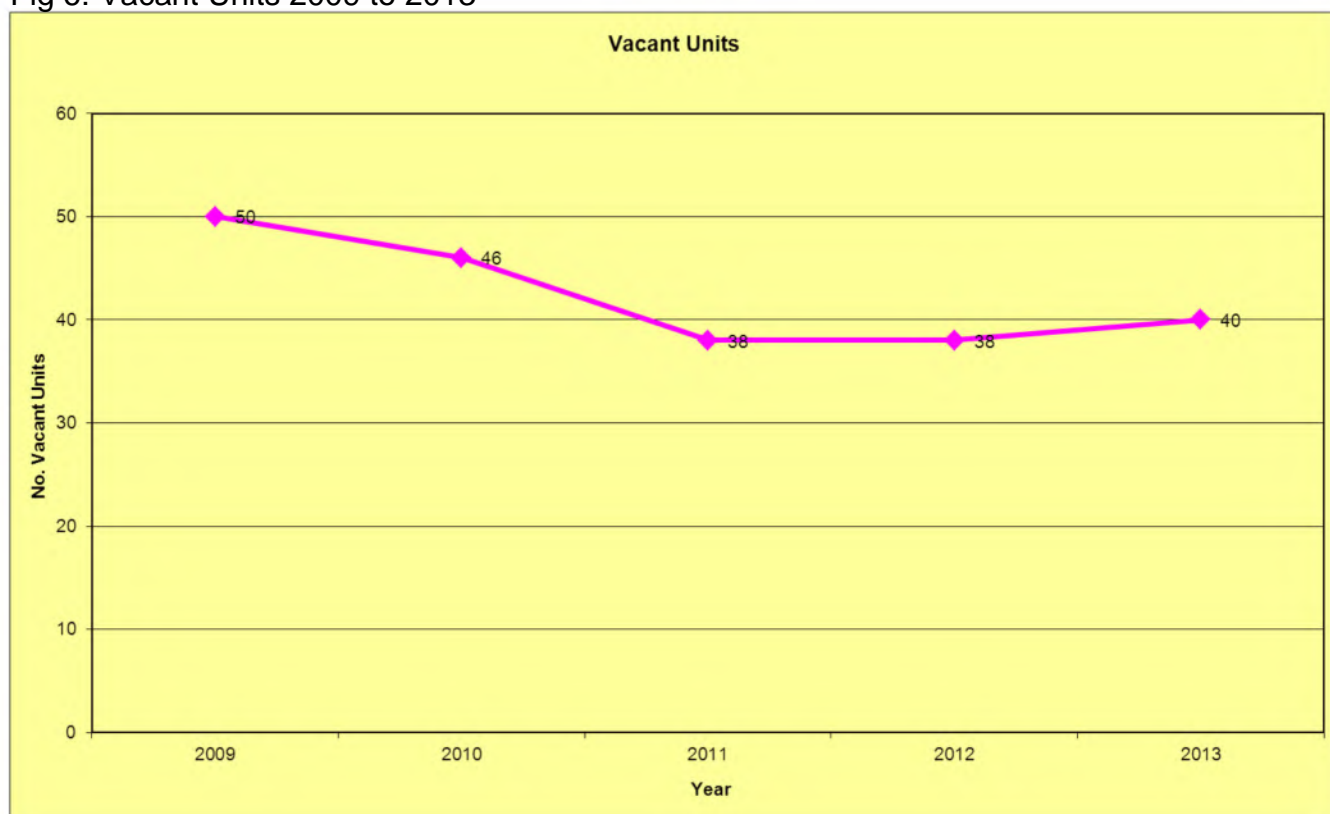


Table 12: General Uses across Bromsgrove Town Centre

	A	B	D	SG	Vacant	Total
Primary	153	2	1	2	20	178
	86.0%	1.1%	0.6%	1.1%	11.2%	100.0%
Secondary	46	4	3	5	7	65
	70.8%	6.2%	4.6%	7.7%	10.8%	100.0%
Other	46	14	18	14	13	105
	43.8%	13.3%	17.1%	13.3%	12.4%	100.0%
Total	245	20	22	21	40	348
	70.4%	5.7%	6.3%	6.0%	11.5%	100%

4.13 The NPPF states that Council’s should define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations. These areas have been established as part of the Bromsgrove District Local Plan. The primary shopping area (PSA) is the centre for retail development. The table above indicates the overall use classes and the number of units and percentage in terms of the area (Primary, secondary, or other).

- 4.15 The 2013 survey highlights that within the primary shopping area, 86.0% of its units fall within 'A' use classes. 69.1% of all A1 uses (including charity shops) in the town centre locate in this area (105 units), this is followed by A2 professional and financial services (56.8% / 25 Units) and A3 food and drink (65.2% / 15 units). Although it looks surprising that 100% of the B2 general industry use locates in the primary shopping area, the percentage figure is distorted by the fact that there is only 1 B2 use in the town centre (the Bromsgrove Printing Co. on Worcester Road). The possible explanation for the B2 use to be located in the primary shopping areas could be due to the more diverse uses of the nearby secondary shopping area. 20 vacant units (50.0% of the total vacant units) were also recorded in the primary shopping area; however, only 11.3% of the primary shopping zone was vacant units. This was a considerable increase on last year, whereby there were 15 vacant units, 8.5% of the PSA total make up.
- 4.16 In the secondary shopping area (SSA), 70.8% of its' units fall within use class A. A1 use accounts for 33.8% (22 units), A2 use 10.8% (7 units), A3 use 6.2% (4 units), A4 use 4.6% (3 units) and A5 use 15.4% (10 units). In accordance with the practical guide 'Planning for Town Centres' (2009), the secondary shopping area "*provides greater opportunity for a diversity of uses*". 6.2% (4 units) are used as B1 offices, 4.6% (3 units) are D1 use and 7.7% (5 units) are Sui Generis. There were a total of 7 vacant units recorded in the secondary area, making up 10.8% of the total units in the SSA, which was a reduction of 1 vacant unit from 2012, 3 in 2011 and 2010, and a decrease from 19% in the 2009 survey.
- 4.17 For areas outside the primary and secondary shopping areas, 43.8% of the units fall within use class A. They are A1 use 23.8% (25 units), A2 use 11.4% (12 units), A3 use 3.8% (4 units); A4 use 2.9% (3 units) and A5 use 1.9% (2 units). The rest of the units fall within use class B (13.3%), use class D (17.1%) and other uses (13.3%). There were a total of 13 vacant units (12.4% of the total units in this area recorded in the 'other' areas. The number of vacant units decreased by another 2 in this area, which is a vast improvement on the 2010 survey that indicated 23 vacant units in this area.
- 4.18 In terms of where particular uses are concentrated, as mentioned previously, the majority of A1 retail units are based in the Primary Shopping Area (PSA), with a total of 105 units, equivalent to 69.1%. The PSA is also where the majority of A2 (56.8%) and A3 (65.2%) uses are located. There are the same amount of A3 units (4) in the SSA and the 'other' areas. A4 units are similar across all areas with only a difference of 1 unit between the PSA and the SSA'. The majority of A5 uses (62.5%) are located in the SSA, compared with 25.0% in the PSA and 12.5% in the 'other' areas. The overwhelming majority of B1 offices (72.2%) are in the 'other' areas. This location is also where the most B8 (100%), D1 (76.5%), D2 (100%) and Sui Generis (66.7%) uses are located.

- 4.19 Government guidance in 'Planning for Centres' says that different but complementary uses in the town centre during the day and in the evening can reinforce each other and attract people from different age and social groups, making town centres more attractive to local residents, shoppers and visitors. Most of the night time uses in Bromsgrove town centre such as restaurants, takeaways, night clubs, and drinking establishments, locate either at the West End of the High Street and Worcester Road or outside the primary shopping areas, resulting in a quiet primary shopping area at night time. One of objectives in the emerging District Plan is to improve the range and quality of evening economy uses within the town centre, including a choice of bars, cafes and restaurants.
- 4.20 In terms of use across the town centre it is clear that there are still a number of vacant units which need to be tackled, especially as this year's survey has seen an increase for the first time since the data was collected in 2009. The town centre policy within the emerging District Plan in particular will look to address this. The vacant Market Hall site, which is currently used as a temporary car park, is proposed as a potential mixed use development. There are currently five vacant premises along Recreation Road; however this site is currently being promoted as a potential residential development. A planning application has been approved for a Sainsbury's along Birmingham Road, which would replace the current Co-Op and two vacant units. There is also a planning application that been granted regarding the vacant land at 88 to 92 Birmingham Road for a petrol garage, which would see the existing Texaco garage move from the Sainsbury's site. In October 2011 Bromsgrove District Council announced plans to move into the vacant Parkside Middle School building in the town centre. There is a current planning application pending regarding this site, which also involves the relocation of the library and the Job centre.

Mix of Uses

- 4.21 A New Goad Category Report was obtained for this year's Health Check as the previous data was from 2008 and therefore somewhat outdated. The baseline date for the new report was September 2012 and covers ground floor units in the primary shopping areas and part of the secondary areas identified in the Bromsgrove Proposals Map. The Goad Category Report is attached in Annex C and highlights a total of 256 units.
- 4.22 The tables below show the counts and floorspace by sector. The report illustrates that both number of units and floorspace in Bromsgrove Town Centre is dominated by comparison goods such as clothing, charity shops, electrical and other durable goods, as well as greeting cards and telephones and accessories (82 units and 32%). Although this percentage is similar to

the UK average, there is less convenience in terms of floorspace compared with the UK average. The opposite occurs in terms of convenience, with Bromsgrove having 12% less units than the average but 20% more in terms of floorspace. This is due to two large supermarkets (Co-Op and Asda) situated in the centre. Retail services are higher than the UK average (units – 18%, floorspace – 24%), which is dominated by health and beauty related uses and also six opticians. In terms of leisure facilities, there is considerably less than the UK average (units – 13%, floorspace – 19%) and mainly consists of cafes, restaurants, public houses and Hot Food Takeaways. There is a high number of financial and business services, far exceeding the UK averages (Units – 39%, floorspace – 41%). This sector is dominated by financial service business, property services and retail banks.

	Outlets	Area %	Index
Comparison	82	32.03	97
Convenience	18	7.03	88
Retail Services	41	16.02	118
Leisure Services	49	19.14	87
Financial & Business Services	39	15.23	139
Vacant Retail & Service Outlets	27	10.55	87

Source: Goad Category Report for Bromsgrove (September, 2012)

	Outlets	Area %	Index
Comparison	169,400	31.09	86
Convenience	94,600	17.36	120
Retail Services	49,000	8.99	124
Leisure Services	87,900	16.13	71
Financial & Business Services	64,100	11.76	141
Vacant Retail & Service Outlets	79,900	14.66	144

Source: Goad Category Report for Bromsgrove (September, 2012)

Edge-of-Centre and Out-of-Centre Locations

- 4.23 One of the indicators used for town centre health checks relates to the amount of retail, leisure and office floorspace in edge-of-centre and out-of-centre locations. Bromsgrove town centre area is mainly surrounded by residential use, except to the southwest which has some industrial use.

Retail

- 4.24 In terms of retail in edge-of-centre locations, there is an Asda store on Market Street, which also has a multi-storey car park, an off street car park and a recreation ground beside it. The store is physically separated from the primary shopping streets by the busy Market Street. A traffic light crossing has been installed to aid movement between the two. The pedestrian count shows that the Asda crossing is a busy one. However, it is difficult to judge whether supermarket shoppers would also spend time in the town centre as people going to the town centre may also park at the car parks by Asda and use the crossing to get to the town centre. Other well-known retailers on the edge-of-centre are Halfords on Birmingham Road and Just for Pets in Market Street.
- 4.25 On the edge-of-centre outside the primary and secondary areas, there are 25 retail (A1) units, including five hair salons, two chemists, two opticians and two DIY stores, amongst others. This area includes part of Worcester Road, Birmingham Road, Crown Close, Hanover Street, Perry Lane, Recreation Road, St John Street, Stourbridge Road and Windsor Street.
- 4.26 In terms of out-of-town retail, there are a few small convenience related businesses in close proximity to the Town Centre, namely Sidemoor and Charford, however, they are for day to day goods and unlikely to have any impact on the Town's vitality and viability. On the other hand, there are two large supermarkets (Morrisons and Aldi) situated approximately 2km to the southeast of the Centre.

Leisure

- 4.27 Approximately 200 metres from the primary shopping area in School Drive is the Dolphin Centre which includes swimming pools, fitness suites, exercise studio, sports halls and training and conference centre. There are two off street car parks by the centre which provide 164 spaces and 13 spaces for the disabled. The emerging District Plan will propose to extend the town centre boundary to include the Dolphin Centre and neighbouring car parks as well as land further along School Drive.
- 4.28 The Artrix; a versatile multi-disciplinary arts centre with a 300 seat auditorium, a spacious dance studio, meeting rooms and a visually stunning foyer/gallery is located at the end of School Drive, a short walk from the Primary shopping area and boasts an ample size free car park.
- 4.29 In close proximity to the Artrix is a David Lloyd fitness facility, with gym, swimming pool, tennis and squash courts. However, these are for use for

private members. The Ryland Centre is situated approximately 500m from the Town Centre along New Road. This facility boasts a gym, fitness classes, athletics track, football pitch, badminton, netball, as well as numerous other facilities. Although some facilities are only open to members, a considerable amount is also accessible to the public.

- 4.30 There are a number of other leisure activities on the edge of the Town Centre in regards to the evening economy. In total, there are two takeaways, three restaurants, three pubs and a café within the edge-of-centre along St. John's Street, on Worcester Road and Birmingham Road.

Office

- 4.31 St Johns Street is mainly used for professional businesses (six A2 uses), such as solicitors, accountants, architects and estate agents. Further down towards the primary shopping area on New Road are four A2 uses (an accountant and three estate agents) and an off street car park. Along Birmingham Road further down the secondary shopping area is a small business park, Holts Studio with four active independent small businesses. There are a number of other small office spaces within edge-of-centre locations.
- 4.32 Regarding out-of-town offices, there was a large B1 development completed in 2011 at Barnsley Hall Farm along the Birmingham Road (A38) which is approximately 2.5km north of the Town Centre. There are also a number industrial estates and business parks approximately 2.5km southwest of the Centre, which have numerous office facilities.

Potential Capacity for Growth

- 4.33 The land uses surrounding the town centre zone can act as a physical barrier to the future expansion of the town centre. However within the town centre zone, there are several sites / areas that may have development opportunities. The Draft Town Centre AAP published in January 2011 shows a number of potential development sites across the town centre. These sites/areas will be carried forward as part of the emerging District Plan.

Retail

- 4.34 New retail accommodation will be provided to expand the variety on offer of the Town Centre. The Draft AAP involves concentrating commercial and

retail development around the High Street and other areas of the Primary Shopping Area, which is a concept that will be carried forward within the emerging District Plan. Due to the physical space constraints of this area new additional retail accommodation will be provided as part of potential mixed use schemes in key locations. This approach will improve the quality and range of town centre shopping and help to define and distinguish Bromsgrove as a centre which contains the High Street retailers many people expect, but will also ensure that smaller boutique style independent retailers are safeguarded along with the historic shop premises which many of them occupy.

- 4.35 It is hoped existing retail sites such as the approved Sainsbury's scheme on Birmingham Road Retail Park will offer improved shopping opportunities. This is in addition to other sites proposed as part of emerging District Plan. The former Market Hall site is suitable for a high profile retailer and could provide a potential new retail led mixed use location, adding to the overall retail offer and creating an anchor at the southern end of the Town, thus ensuring active retail uses along the entire length of the Primary Shopping Area.
- 4.36 Windsor Street would provide the opportunity for larger retail and leisure units that cannot be accommodated on the High Street, preferably as part of a mixed use development. The town currently suffers from a lack of larger retail units which some high street retailer's desire. The Mill Lane 'Iceland' Site has the potential for re-development to create a large, modern, high quality High Street retail space. This will improve the retail offer in the Primary Shopping Area and allow for improved public realm, creating a more attractive route to ASDA and the Recreation Ground.

Employment/Commercial

- 4.37 The Town Centre is currently home to a variety of employers. In addition to those employed in the retail sector, significant numbers of people work in office based jobs as well as some light industrial businesses. It is important that a wide mix of employment opportunities is maintained and expanded to allow for a Town Centre that can be successful in all market conditions.
- 4.38 An important part of this will be the significant improvement in the provision of office accommodation within the Town Centre. The expected expansion and increase in the population of the District will bring with it a requirement for new employment opportunities. Whilst some of this will be provided for on existing employment sites and new development on the expansion sites, it is important that the Town Centre also offers new opportunities. Office based development within the Town is seen as important, particularly with the

increased catchment area for business and employees offered by the planned electrification of the cross city railway line and in the longer term the provision of a new train station. These improvements will make Bromsgrove even more readily accessible from Birmingham. In order to capitalise on this it is important to offer a pleasant and affordable choice for businesses and commuters choosing to relocate out of very costly city centre accommodation.

- 4.38 A significant number of people in and around the Town Centre are employed by the public sector but unfortunately the accommodation tends to be in outdated and inefficient properties. It has been recognised that a rationalization of all the public property assets could release further regeneration opportunities. As part of this rationalisation, public sector buildings such as a new Council House could be provided and this will allow the public easier access to the Council and other services in a modern and accessible environmentally friendly building. Providing new public sector facilities in the Town Centre will not only ensure the Council's ability to provide accessible services is maintained but it will also keep a significant number of employees in the Town Centre which adds to the overall vibrancy and vitality. There is currently an application pending for the Parkside School Site, which includes a new civic centre, as well as the relocation of the library and job centre.
- 4.39 The site at the Birmingham Road / Stourbridge Road Junction has been highlighted as a possible location for new office development. The site would be required to reinstate street frontages along Birmingham Road with high quality distinctive architecture at the strategically important Parkside Crossroads.

Housing

- 4.40 Town Centre residential development can be accommodated in a number of different ways although it is envisaged that capacity can be provided;
- In the conversion of vacant spaces above shops on the High Street and surrounding areas,
 - Within mixed use development schemes identified in the emerging District Plan
 - And on Recreation Road in a dedicated retirement living complex
- 4.41 Any new residential development in the town will provide a welcome addition to the overall housing offer and as such should reflect the needs of the

District. New housing should focus on the provision of smaller affordable units, and housing suitable for the elderly, although more aspirational housing will also be welcomed in appropriate schemes and locations.

Community, leisure and Cultural uses

- 4.42 Town Centres are generally considered as the principal locations for entertainment and cultural activity. In Bromsgrove, evening activity is largely limited to public houses and some restaurants. Improving the opportunities to eat and drink is important to residents and visitors to the Town Centre, although a balance is required between traditional pub and restaurant culture and other social activities. In order to accommodate other much needed social facilities, the provision of meeting places for members of the community such as the young or old, who can't or don't want to use more traditional meeting places like pubs and restaurants will be supported by the Council as potential uses on key development sites. Opportunities to encourage more active uses of public areas for street cafes will be supported as it is important that a public realm is developed which supports the creation of safe and desirable outdoor areas to enjoy throughout the year but particularly in the summer months.
- 4.42 Other evening activities will be developed such as twilight shopping or similar events and activities. A cinema is a potential use which could form part of development on the historic market site. Improvements to pavements and lighting along School Drive, as well as improved signage and lighting of the Artrix itself, will help connect it more successfully with the centre of Town. Evening parking charges will be reviewed and additional taxi and bus services instigated to improve the accessibility of the Town Centre in the evening.
- 4.43 All community groups need their Town Centre to be one that they can use and enjoy. The design of the public realm and open spaces will incorporate room for evening and day time events. These include Farmers Markets, Specialty Markets, Christmas Events, Street Theatres, and Park Programmes etc., which bring many visitors into the vicinity of the Town Centre at certain times.
- 4.44 Sites that have been identified as possible locations for leisure opportunities include the Recreation Ground, which the council wishes to revitalise to provide a space which is a real asset to the communities who live and work in the Town centre, and to also offer an additional attraction to visitors. Another leisure opportunity is along School Drive, where the Council believes the current Dolphin Centre site offers the most scope for a new

leisure centre although with a reconfigured layout including revised car parking arrangements.

Retailer Representation

- 4.45 According to the Goad Category Report (September, 2012), a multiple retailer is defined as 'being part of a network of nine or more outlets'. National multiples identified as major retailers by Goad are considered most likely to improve the consumer appeal of a centre. These national multiples are put under five categories, department stores, mixed goods retailers, supermarkets, clothing and other retailers. In Bromsgrove town centre, there are no major retailers present in the department stores and supermarkets categories, although permission has been granted for a Sainsbury's store. In the mixed goods retailers' category, Argos, Boots and WH Smith are represented. In the clothing category, Burton, Dorothy Perkins and New Look are represented. In the other retailer's category, Carphone Warehouse, Clintons, and Phones 4 U are represented.
- 4.46 Some other well-known convenience retailers which are not considered as national multiples in the Goad Category Report but are represented in Bromsgrove town centre are: Asda in Market Street with 5,360m² floorspace and Co-Op (formerly Somerfield) on Birmingham Road with 1,370m² floorspace. As previously mentioned, an application for a Sainsbury's supermarket development of 4,700m² was passed in 2010 on the current site of Co-Op, Lush Furniture and Focus on Birmingham Road.
- 4.47 Several financial and business services like national banks and housing societies also have their branches in the High Street. These include NatWest, Barclays, Santander, Lloyds, Halifax, West Bromwich Building Society and Nationwide Building Society. Other comparison and service retailers that are represented in the Bromsgrove town centre include Knights Pharmacy, Bodycare, Mothercare, F Hind, Claire's Accessories, Halfords, First Choice, Thomas Cook, Orange, Iceland, Subway, Pizza Hut, Prezzo, Pizza Express, Wetherspoon, The Slug and Lettuce and many more.
- 4.48 The GOAD retail address data indicates that approximately 56% of the Town Centre is made up of non-multiple retailers. Many of these units are occupied by local businesses. The emerging District Plan involves concentrating commercial and retail development around the high Street and the other areas of the Primary Shopping Zone. Due to the physical constraints of this area, new additional retail accommodation will be provided as part of potential mixed use schemes in key locations. This approach will improve the quality and range of Town Centre shopping and help to define and distinguish Bromsgrove as a centre which contains the High Street

retailers that people expect, but also ensure that smaller boutique style independent retailers are safeguarded along with historic shop premises which many of them occupy.

4.49 Despite the presence of all these multiple retailers, 83% of respondents in the Bromsgrove Town Centre AAP survey (2008) still considered the range of shops in Bromsgrove as very poor or poor, only 16% considered them as adequate or good and none considered it as excellent. The top choices which respondents considered would make the town centre a better place to shop are:

1. More small independent and specialist shops (63%)
2. A department store (59%)
3. More national chain stores (53%)
4. Regular farmers markets (44%)
5. A high quality national food store for the Market Hall site (39%)
6. Occasional special markets such as a French street market (39%)

4.50 The major retailer that respondents most wanted to see in Bromsgrove is Marks and Spencer (41%). In regards to the range of eating and drinking places in Bromsgrove, 61% considered it as adequate, good or excellent and 38% considered it as poor or very poor. The top choices that would be most likely to attract respondents into the town centre in the evening are:

1. A safe environment (59%)
2. Theatre or cinema (56%)
3. Restaurants and cafés (55%)

Proportion of vacant street level property

4.51 One important indicator of a town's health is the proportion of vacant shops. The distribution of vacant units and other associated uses (i.e. charity and other outlets with rate rebates) provide an indicator of the attractiveness of an area to new business, although it should be noted that vacancies in outlets occur not only when an area is economically unattractive to potential businesses, but also due to redevelopment, building renovation or changeovers between tenants.

4.52 As of May 2012 the British Retail Consortium on UK high streets showed the West Midlands have one of the worst 'shop vacancy rates' in the country. The national town centre vacancy rate in the UK was 11.1% in April 2012, whereas, the West Midlands had one of the highest vacancy rates, at 12.9%.

"Double digit declines in shopper numbers in April in almost every part of the UK and stubbornly high shop vacancy rates confirm how tough conditions are for customers and retailers. Essentially consumers' lack confidence, disposable incomes are still dropping and fewer people are shopping for anything that isn't essential." (Stephen Robertson, British Retail Consortium Director General, 2012)

4.53 The negative outlook on vacancy rates continued and was supported by The Local Data Company (LDC) who published results in May 2013 indicating the national shop vacancy rates throughout 2012, which were still at high levels. The LDC report illustrated the following facts and figures:

- There are 35,516 vacant units across the UK, out of total 278,915 units visited
- The proportion of empty units in the UK's top 650 town centres is 14.2%, up 0.1% from 2011.
- The estimated shop vacancy rate would be 17% if January's spate of administrations were added in
- 1 in 7 shops are currently empty
- The worst hit large town centre in the UK was Stockport with a vacancy rate of 28.3% followed by Walsall, Grimsby and Bolton
- The worst performing medium town centre was Dudley in West Midlands with a vacancy rate of 32.4%. This is some way above Newport, South Wales in second place with 29.8% vacancy and Hartlepool with 28.9%.
- The best performing town centre in UK was Cambridge with a vacancy rate of 6.0%, followed by Kingston-Upon-Thames, St. Albans and York
- The vacancy rate in large high streets was 13.7%
- The vacancy rate in small high streets was 9.2%
- The worst hit destinations were shopping centres with a rate of 15.6%
- The best performing destinations were retail parks with a rate of 8.8%

4.54 LDC director Matthew Hopkinson said the figures show *"increasing polarisation of performance between town centres, shopping centres and retail parks in every part of the country. Online is driving growth for a majority of retailers, and so 2013 is all about the supporting role that shops will have as 'customer experience' centres and showrooms as much as transactions through their tills. Inevitably this means fewer shops will be required...and as such one can expect this divergence in performance to grow. Secondary shopping centres are coming to the fore in this respect. The big unknown is how technology will continue to channel and mould consumer spending habits and to what effect. The pressure between online and rising costs of running a shop on the high street due to rents, rates and parking charges, is likely to become an increasingly hot topic."* (Local Data Company, 2013)

4.55 The Goad Category Report (September 2012) shows that there were 27 units (10.55%) of vacant retail & service outlets in the Bromsgrove town

centre, whereas the UK national average is 12.16%. In terms of floorspace, the total floorspace recorded vacant was 79,900 sq. ft. (14.66%), whereas the UK national average is only 10.16%. This indicates that vacancies occurred mostly in larger units. Although the Goad Report has been updated since last year's health check, it is still somewhat outdated compared to the ground floor use survey conducted in house by the strategic planning team. This was conducted in June 2013 and also covers the whole Town Centre boundary, whilst the Goad Report is confined to the Primary Shopping Zone and some parts of the Secondary Shopping Zone.

- 4.56 The in house surveys showed that number of vacant units decreased from 2009, yet remained the same in 2012 and then increased in 2013. As mentioned previously in the document, there was a decrease in vacant units from 46 to 38 units in 2011, which is equivalent to a 17.4% reduction, yet it remained at 38 units in 2012. It must be noted in the 2012 monitoring, that due to the increase in the overall number of units in the town centre, the vacancy rate actually decreased from 11.1% to 10.9%. However, the 2013 survey has shown an increase of 5.26% to 40 vacant units. This represents a vacancy rate of 11.5% across the whole town centre, which is a slight increase on the Goad report figures, but still less than the UK average.
- 4.57 The largest increase in vacant units was seen in the Primary Shopping Area where there was a rise from 15 vacant units to 20 vacant units in 2013. Although the number of vacant units in the PSA is only 11.2%, they still represent 50% of all vacant units across the Town Centre. The SSA reduced from 8 to 7 units, and also experienced a two unit reduction the previous year. The 'other' areas also saw a reduction from 15 vacant units in 2012 to 13 vacant units in 2013.

Shopping rents on non-domestic property

- 4.58 The area to the front of the shop is normally referred to as 'zone A'. Zone A rent refers to the rental value for the first 6 metres depth of floorspace in retail units from the shop window and it is the most valuable area of the shop. Normally the rate per square metre drops as it moves towards the rear of the shop. Due to commercial sensitivity, data of zone A rent is very hard to acquire.
- 4.59 Retail rents across the West Midlands have fallen by 3.4 per cent in the last year according to Colliers International's annual Midsummer Retail Report (2012). There were 33 regional shopping centres and high streets surveyed, with only one, Lichfield, experiencing a rise in rents. The biggest faller was Rugby, where rents declined by a staggering 15.4 per cent. Rents are now £55 per sq. ft. in the market town. High vacancy rates at the Swan Centre, which is anchored by ASDA, are a contributory factor.

- 4.60 In all, 17 shopping areas saw a decrease in rents, with 15 remaining stable. Overall, the average rent in the region is £90.8 per sq. ft., compared to the national average of £109.80. The top rents are being achieved in major city centres and out-of-town malls. Birmingham city centre tops the rent table in the region; at £275 per sq. ft. Merry Hill was second highest, at £240 per sq. ft., with Solihull in third at £195 per sq. ft.
- 4.61 The Black Country towns of Dudley and Stourbridge are achieving the lowest average rentals, at £30 per sq. ft. for their shopping space. Stourbridge has at least maintained its rental levels from last year, and rises are anticipated next year as a result of void space at the Ryemarket shopping centre reducing over the last couple of years and rents of £40 per sq. ft. being achieved there. Dudley has recorded a 14.3 per cent decline, second only to Rugby's, and continues to suffer from nearby Merry Hill Shopping Centre. The overall regional decline of 3.4 per cent compares with a national average of 1.2 per cent.
- 4.62 In Bromsgrove Town Centre itself the average rent is £40 per sq. ft. compared with £45 per sq. ft. in 2011, representing an 11.1% reduction. The table below shows the retail space rents across the West Midlands (Collier's international, 2012).

Table 14: Retail space rents in the West Midlands

Centre	2011 per sq. ft.	2012 per sq. ft.	%Change
Birmingham	275	275	0.0
Bromsgrove	45	40	-11.1
Burton-upon-Trent	100	95	-5.0
Cannock	55	50	-9.1
Coventry	155	150	-3.2
Droitwich	40	40	0.0
Dudley	35	30	-14.3

Evesham	50	45	-10.0
Halesowen	50	50	0.0
Hereford	100	95	-5.0
Kidderminster	60	55	-8.3
Kings Heath	60	60	0.0
Leamington Spa	120	120	0.0
Lichfield	75	80	6.7
Merry Hill	250	240	-4.0
Newcastle-under-Lyme	55	50	-9.1
Northfield (Birmingham)	45	45	0.0
Nuneaton	85	75	-11.8
Redditch	90	90	0.0
Rugby	65	55	-15.4
Shirley	45	45	0.0
Shrewsbury	110	110	0.0
Solihull	195	195	0.0
Stafford	70	65	-7.1
Stourbridge	30	30	0.0
Stratford-upon-Avon	140	130	-7.1
Sutton Coldfield	115	105	-8.7
Tamworth	75	70	-6.7
Telford	135	135	0.0

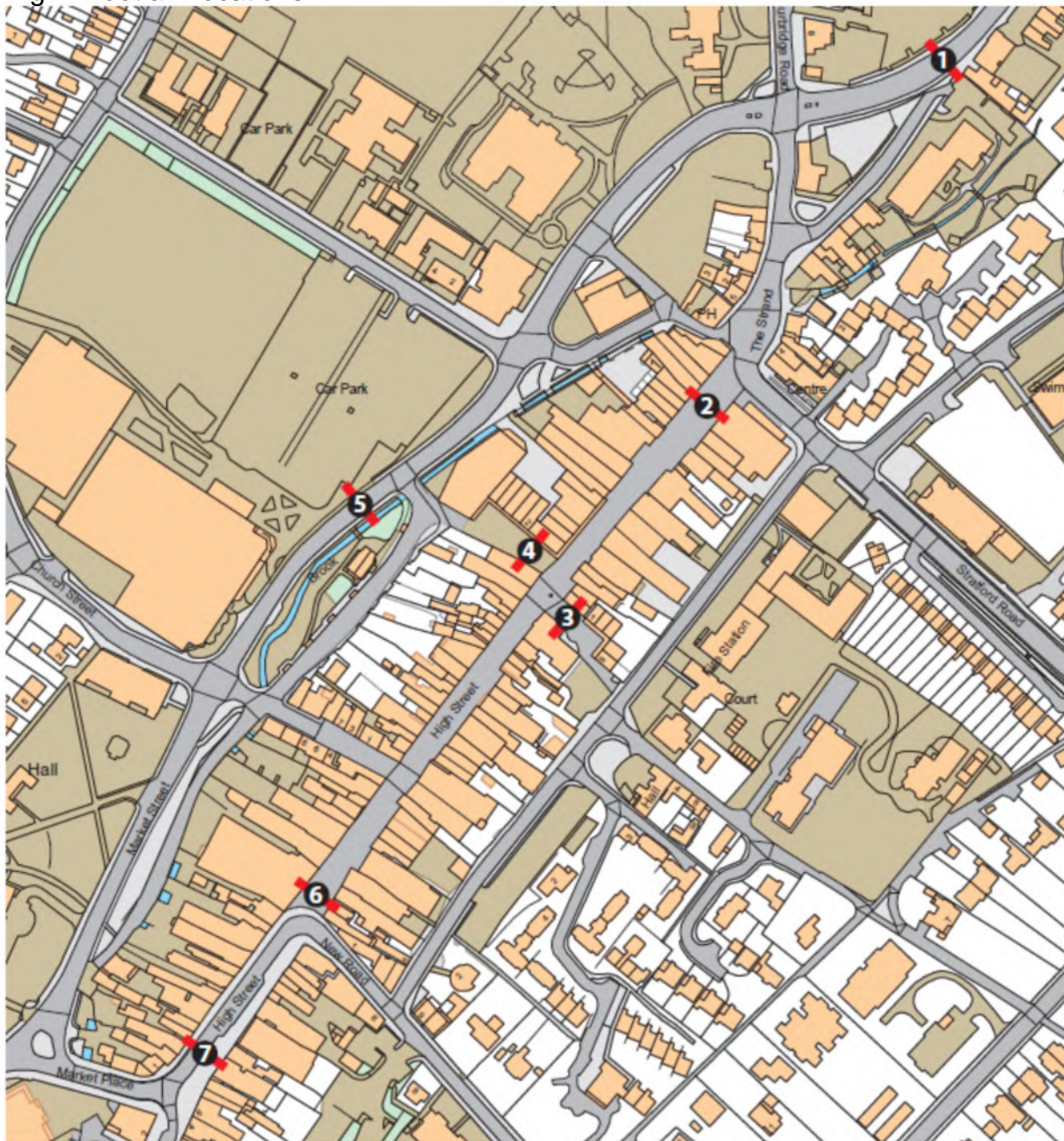
Walsall	85	80	-5.9
West Bromwich	50	50	0.0
Wolverhampton	95	95	0.0
Worcester	145	145	0.0
WEST MIDLANDS average	93.9	90.8	-3.4
ALL GB average	111.1	109.8	-1.2

Commercial yields

4.63 The commercial yields on non-domestic property shows the capital value of the non-domestic properties in relation to their expected market rents. The level of yield broadly represents the market's evaluation of the risk and the long term profitability of the centre for retail, office and other commercial developments. Broadly speaking, low yields indicate that a town is considered to be attractive and as a result be more likely to attract investment than a town with high yields. In 2009, the yield for shops in Bromsgrove is thought to be around 6%. For comparison purpose, the yield of Barnsley, Doncaster, Huddersfield, Leeds & Wakefield in 2007 were 7.25%, 5.50%, 7.00%, 4.25% & 6.75%. In other words, among these centres, Leeds centre in general was seen by investors as having the lowest market risk and higher long term profitability for retail, office and other commercial developments. Unfortunately, more recent on commercial yields was unable to be attend as part of this year's Health Check.

Pedestrian Flows (Footfall)

Fig. 7 Footfall Locations



4.64 Measuring the flow of pedestrians provides a basic measure of town centre usage and involves counting the number of people passing specific points over a particular period of time. The counts could be influenced by such factors such as location of car parks, public transport interchanges and the most popular retailers.

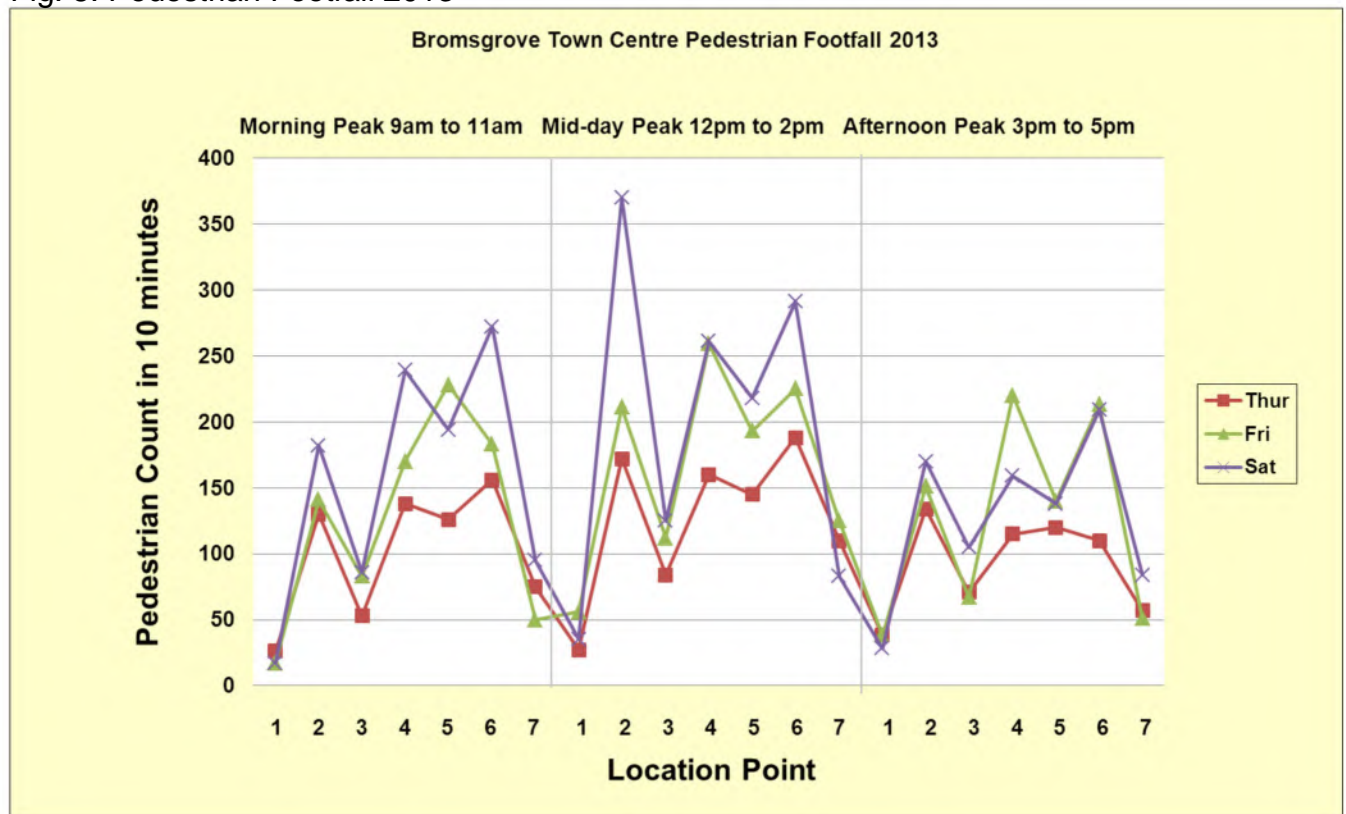
4.65 The use of this indicator is more useful over time as it can be used to identify trends both as a result of local and national influences. For example the opening of a new retail unit may encourage more people to visit a certain

area so the level of footfall rises or an area with a high proportion of vacant units may see a reduction in footfall. The pedestrian flows were first recorded in 2009, and compared with annually each year. However this year the pedestrian count has changed somewhat to include more locations and also more appropriate locations in order to obtain the best data. The new location points introduced cover a larger proportion of the Town Centre and are located near to proposed development / regeneration opportunities. As time progresses and these developments are completed it will be easier to trace whether foot fall has been affected by these developments.

- 4.66 Originally, the pedestrian count was carried out at five points in the morning, midday and afternoon peak on a non-market day, a market day in the week and a market day on a Saturday. The survey points were chosen as they are the main entry/exit points for visitors to the High Street due to the different locations of car parks and public transport stops. However, as mentioned in previous 'Health Checks' there are a number of potential developments across the town centre and further points will be considered to examine the impact of these developments. Following on from this, the timings of the counts have remained the same, as have the days, but there are now seven monitoring points as identified in the map above (Fig. X).
- 4.67 The new locations added are further north of the town centre outside the former museum and further south along the High Street outside Pizza Hut. The northern location was added to show the amount of people entering the town from the car park located at Co-Op. This location is also subject to an approved planning application for Sainsburys and the emerging District Plan intends to extend the Primary Shopping Area up to this part of the Town. The southern addition gives a better indication on people entering from Worcester Road and the car park at former Market Hall. This location is also identified for redevelopment. Once these developments are completed, the pedestrian counts in these locations will identify whether the areas are used more regularly. The other changes to the locations was location point 3, which was moved a few metres to Chapel Street to give a better indication of the use of Windsor Street car park and the number of people entering the town from here. In previous years location points 2 and 3 (old references) only counted one direction, however for the 2013 count and subsequent counts, both locations are counted in line with other locations. This is in order to give a true reflection of pedestrians passing by these areas.
- 4.68 There are numerous locations to enter the town centre, whether as a pedestrian or by driving. To the north of the High Street are 4 car parks, Parkside, Stourbridge Road, Dolphin Centre and School Drive. They provide 329 spaces and 24 spaces for the disabled. Visitors parking at these car parks will likely to enter/ leave the town at the top of the High Street and pass by counting point 1 and 2.

- 4.69 To the east of the High Street is the Windsor Street car park which provides 65 spaces and 4 spaces for the disabled people. Visitors parking here are likely to enter/ leave the town from Chapel Street and pass by counting points 3 or 4.
- 4.70 To the south of the High Street are the New Road and Hanover Street car parks. They provide 194 spaces and 13 spaces for the disabled. Visitors parking here are likely to enter/ leave the town at the bottom of the High Street and pass by counting points 6 and 7. The site that was formally Market Hall is also currently being used as a temporary car park.
- 4.71 To the west of the High Street lie the two largest car parks in the Centre. They are Recreation Road South off street car park and the Churchfields multi-storey car park by Asda. There is also a small car park further away Recreation Road North. They provide 627 spaces and 41 spaces for the disabled. Visitors parking at these car parks are likely to cross at the Asda crossing and enter/leave the town from Mill Lane, i.e. counting points 4 and 5. The bus station and taxi stand located at Clown Close near the Asda crossing, hence visitors taking public transport are also likely to enter / leave the town from Mill Lane.
- 4.72 Although it is more meaningful to compare pedestrian count over time, the surveys done on market days and non-market day could be served as a general indicator of the attractiveness of the outdoor market introduced in Bromsgrove High Street. It is important to note though, weather by itself is one of the major factors affecting pedestrian footfall. The pedestrian survey counts are attached in appendix D for 2009, 2010, 2011, 2012 and 2013.
- 4.73 The graph (Fig. 8) below highlights the Pedestrian footfall during the 2013 survey, which can be compared with the information in appendix D for the 2009, 2010, 2011 and 2012 data. Consistent with previous years, the 'lunchtime' counts exceed both morning and afternoon recordings. As mentioned previously, comparisons with previous years are more difficult as there are more location points and therefore data cannot be compared easily.

Fig. 8: Pedestrian Footfall 2013



4.74 Each year from 2009 to 2012 (as well as 2013), the pedestrian flow was surveyed on a non-market weekday, a market weekday, and a Saturday market day (which happened to be the Saturday farmers market in 2009, 2010, 2011 and this year). One of the major differences was that both the 2009 and 2010 pedestrian counts were conducted in June, whereas due to other commitments, the 2011 and 2012 survey was not conducted until July. In order to maintain comprehensive data the 2013 and all subsequent counts will be conducted in July and also include a Saturday Farmers Market. The new data will include the seven location points so comparisons can be made year on year.

4.75 There were only three locations that could be compared with previous years as the others had been relocated. These were the 'old' numbered locations 1, 4 and 5, which are now locations 2, 5, and 6. The table below shows the differences between the 2012 and 2013 surveys at these locations:

	Year	Non-Market	Market Day	Saturday Market Day	Total

Location 2	2012	540	675	77	1993
	2013	436	503	722	1661
Location 5	2012	410	472	551	1433
	2013	391	561	550	1502
Location 6	2012	462	595	811	1868
	2013	454	621	772	1847

- 4.76 The table shows that overall there has been a decrease in the number of pedestrians across the three location points compared with 2012. Although location 5 in fact had a small increase and location 6 a small decrease; Location 2 significantly reduced by 332 people. It is hard to determine exactly why this big difference occurred, but it could be partially explained by this location being 'counted' slightly later than usual as a new location point was added before it. This meant that some of the footfall in the afternoon from pupils leaving Bromsgrove North High School (which is in close proximity to this area) would be missed. However, more details can be collated and analysed in subsequent years.
- 4.77 Although it has been difficult to compare results with previous years, analysis can still be made with this year's data. In line with previous years, the market day in the week had a higher footfall than the weekday without a market. This year there were 2235 pedestrians recorded on the non-market day and 2933 on the market day in the week, indicating a 23.8%. Although there were less location points in previous years, the difference between market and non-market weekday was similar, with a difference of 23.3% between them in 2012. The difference in non-market days in contrast to market days was consistent over the five year data sets, which indicates the market has a positive effect on pedestrian numbers.
- 4.78 The 2013 survey indicates that the busiest location over the three days was location point 6 with a total of 1847 pedestrians. This point was also the busiest in 2010. The busiest point in 2011 was location 5 (Asda crossing) and in 2012 it was location point 2 (near Argos). The reason for location point 6 being the busiest this year is uncertain. When this location was busiest in 2010, this could be accounted for by the opening of Poundland in the former retail space where Woolworths was situated. This store is still actively used by pedestrians. There are also three car parks in close proximity to this location point allowing good access to the Town Centre. Now there are more location points monitored and there are a number of

potential development sites across the town, succeeding years will illustrate the locations that are more actively used as a result of regeneration.

- 4.79 Unfortunately it is difficult to tell if the Town Centre is improving and attracting more visitors solely based on these results, but as years goes by this information will be more apparent. However, based on previous year's results there appears to be a growing trend that the town centre is getting busier. The Saturday Farmers market was particularly higher as the years have progressed.
- 4.80 As the emerging District Plan progresses and more regeneration/re-development takes place, pedestrian numbers are expected to increase as Bromsgrove town becomes more appealing. The provision of new retailers will increase the range of goods/products available to the public and subsequently increase footfall as the town centre is used more frequently. The footfall survey can be a useful monitoring tool to provide evidence on the impact the Town Centre policies within the District Plan on pedestrian numbers. It is felt that from next year, the additional survey points introduced this will give a true reflection of footfall across the whole of the town centre.

Accessibility

- 4.81 Accessibility is very important if people are to be attracted to an area. This covers a number of issues including cost, frequency and proximity of parking or public transport in relation to final destination. It is also important that movement within the town centre is simple by providing a co-ordinated network of facilities that are well signposted and user friendly. Visitors can access Bromsgrove town centre via a variety of means: train, bus, taxis, on foot, bicycle and car.

Rail

- 4.82 The town is served by Bromsgrove station in Aston Fields. It is around 1 mile away from the town centre. However, connection between the town centre and the train station is quite poor. There is no frequent bus service connecting the two and normally there is no taxi waiting at the taxi rank to take passengers. The station provides passenger services to Birmingham New Street to / from Hereford calling at University (Birmingham), Droitwich Spa, Worcester Shrub Hill, Worcester Foregate Street, Malvern Link, Great Malvern, Colwall and Ledbury.
- 4.83 A new rail station in Bromsgrove is proposed. The project involves replacing the existing railway station with a new station that will be built on the former

goods yard, just to the south of the current railway station. The County Council is working in partnership with Network Rail, London Midland, Centro and Bromsgrove District Council in the relocation of Bromsgrove Station. However, the project was still only in the development stage. Phase two of the project is set to see the electrification of the line from Bromsgrove to Barnt Green by 2015. This is expected to result in an extra three trains per hour on the Cross City Line serving the new station. The County Council is also talking to the bus companies to ensure that frequent bus service to the town centre is secured in the future.

Bus

- 4.84 The bus station in Bromsgrove is located in Market Street, which is just 10 metres away from the High Street. The bus shelters were all replaced in 2009. A range of local bus services within Bromsgrove provide access to the town centre from residential areas within the town like Charford and nearby area such as Alvechurch, Barnt Green, Belbroughton, Catshill, Cofton Hackett, Fairfield, Lickey, Lickey End, Marlbrook, Rednal, Rubery, Merryhill, Halesowen, Birmingham, Redditch, Droitwich, Worcester, Cotteridge, Stourbridge, Kidderminster and Stourport. The services are provided by different bus operators: Ludlow's, Clearway, Dudleys Coaches, M.R.D. Ltd, First, Diamond, A Touch of Class and Hansons of Wordsley and the bus fares vary from operators.

Taxi

- 4.85 Currently taxis are highly concentrated around the Bus Station area, causing congestion. It has been highlighted by police in Bromsgrove District that there is currently a shortage of taxis operating in the Town Centre in the evening. The emerging District Plan will propose new ranks in suitable locations throughout the Town Centre to enable customers to arrive closer to their chosen destination and reduce waiting times. Access to taxi services at other locations such the Railway Station and business parks will also be improved to help support the movement strategy in the emerging District Plan.

Walking and Cycling

- 4.86 The town centre is readily accessible to pedestrians and cyclists as significant residential areas lie close to the town centre. The flat topography of the town (apart from area to the east) could also be considered an aid to the promotion of walking and cycling. The cycling map in Bromsgrove shows national cycle route 5 passing through the town from the southeast to

the southwest. There is also a local cycle route that leads to the town centre from the northeast near Elm Grove by the Princess of Wales Community Hospital.

- 4.87 Cycle parking are available in the Centre for free, for example at High Street (near Argos and near Wetherspoon), at Church Street and by the Market Hall. However, during the footfall surveys each year, there only appears to be a limited number of cycle stands in use. The reasons could be that the cycle stands are very basic and have no shelter. Facilities for pedestrians include benches and the public conveniences. Benches are available around the primary and secondary shopping areas and they are popular among visitors. The public toilet by the bus station was refurbished in 2009 and part of it opens 24 hours. The refurbishment was done in response to the comments received from the AAP Issues and Options consultation.
- 4.88 Market Street, St John Street, Hanover Street, New Road and the Strand all have very busy traffic. Pedestrians can only cross these roads at designated points and these roads become major physical barriers to pedestrians/ visitors. Unfortunately, the crossing facilities are poor and have not assisted substantially in alleviating the impact of the barriers.
- 4.89 Signage is only available in the town centre such as at the Strand, New Road and Market Street. Signage with estimated distance to destinations in a wider area will encourage visitors to walk/ cycle to town. With the closure of the Tourist Information Centre on Birmingham Road, signage is particularly important to help visitors get around Town.
- 4.90 In the Bromsgrove Town Centre AAP survey (2008), respondents considered that opening up, de-cluttering pedestrian routes into the High Street (57%), and improving signage and extend the network of cycle and pedestrian routes leading into the town centre (43%) would help them get around Town. The public consultation questionnaire also identified that a high proportion of shoppers walk into Town from the residential areas surrounding it. This is a very positive feature which shows the Town Centre really does serve those who live in Bromsgrove. The emerging District Plan will strive to make the Town Centre more accessible to those who live a little further away, by providing them with improved walking, cycling and bus routes into their Town Centre.
- 4.91 The large numbers of people who walk into the Town Centre will continue to be encouraged and will be complemented by a similar approach to cycling. As previous mentioned; Bromsgrove sits on the national cycle route network, with route 5 passing through the Town Centre. The County wide transport policies contain a strong aspiration to extend national route 46 from

Droitwich to Bromsgrove. These national routes are currently supplemented by local cycle routes 1 and 2, providing a strong basis for a wider network of cycle routes accessing the Town Centre.

- 4.92 The cycle path network will be designed to make all cycle trips for local residents as convenient as possible and routes will therefore be designed to be direct; continuous; of a high quality; safe for both pedestrians and cyclists and improved signage will give distance and time to the Town Centre and other key locations. On arrival anywhere in the Bromsgrove Town Centre a cyclist must be able to travel without unnecessary risk, secure their cycle and leave it without concern of theft or interference. New, safe, secure, lockable cycle storage will be provided and will be located at car parks, the Bus Station and/or other key gateways and locations within the Town Centre.

Car

- 4.93 The town centre is located approximately 1 mile from junction 1 of the M42, 3 and 4 miles from junctions 4 and 5 of M5. There are 9 pay and display car parks and 2 pay on foot car parks in the town centre zone. In total there are 500 short stay and 779 long stay parking spaces. Among them, there are 87 disabled parking spaces. They are all within a couple of minutes walking distance to the town centre and all have CCTV coverage.

	Bromsgrove		West Midlands		England	
	Count	%	Count	%	Count	%
No car or van (Households)	4,771	12.5 %	566,621	24.7 %	5,691,251	25.8 %
1 car or van (Households)	14,285	37.3 %	952,798	41.5 %	9,301,776	42.2 %
2 cars or vans (Households)	14,169	37.0 %	591,210	25.8 %	5,441,593	24.7 %
3 cars or vans (Households)	3,625	9.5%	136,201	5.9 %	1,203,865	5.5%
4 or more cars or vans (Households)	1,440	3.8%	48,079	2.1 %	424,883	1.9%
Total cars or vans (Vehicles)	60,054		2,757,999		25,696,833	
All Households (Households)	38,290		2,294,909		22,063,368	
Average number of cars/ vans per household	1.57		1.20		1.16	

Source: Office of National Statistics - Census 2011 (2012)

- 4.94 The number of cars and vans available for use by households in England and Wales increased from 23.9 million to 27.3 million between 2001 and 2011. In 2001 there were on average 11 cars per 10 households whereas in 2011 there were 12 cars per 10 households. The proportion of households with access to no cars or one car declined over the decade whereas the proportion with two or more cars rose. London was the only region where the number of cars and vans was lower than the number of households.
- 4.95 The car ownership levels in Bromsgrove are 87.5%. Among them, 37.3% have 1 car/van, 37.0% have 2 and 13.3% have 3 or more. Compared with the regional and national average, which has a car ownership of 75.3% and 74.2% respectively, Bromsgrove's car ownership is significantly higher than the regional and national average. Together with the rural nature of the district, it is therefore not surprising that car is the main mode of transport for local residents visiting the town centre.

Shop-mobility

- 4.96 Shop-mobility is a service that helps all people who consider themselves to have mobility problems (whether through disability, illness or injury) to continue to get around the town centre independently, with freedom, confidence and dignity. In the town centre, there are parking for the disabled, the main shopping streets are pedestrianised, the shops have ramps for wheelchair users, and the pedestrian crossings have special tiles for the visually impaired.
- 4.97 The emerging District Plan will highlight that those with mobility issues will be further assisted with the new public realm designed with appropriate footway surfaces that can be easily used by motorised vehicles. The scheme will also ensure adequate provision of dropped kerbs and other requisite access measures and the design will include necessary provision for those with visual impairment. Physical access to the shop mobility service will also be made easier.

Customer and residents' views and behaviour

- 4.98 Regular surveys will help the Council in monitoring and evaluating the effectiveness of town centre improvements and in setting further priorities. The last survey to collect resident's views, and form the evidence of this health check, was conducted in 2008 as part of the AAP Issue and Options consultation. There were also a number of responses to the Draft Town Centre AAP and Draft Core Strategy 2, which were analysed in the summer 2012 by the Strategic Planning Team. The 2008 survey received a total of 1198 responses and helped inform the next stage of the AAP process. Although this information is somewhat outdated, it still is a useful indicator as

to gain what the local residents think about the Town Centre. The responses to various consultations also highlight more recent views of the public.

- 4.99 From the 2008 survey, the main reason people visit the town centre is for shopping or bank/building society purposes. A total of 70% of respondents come to Bromsgrove to do High Street shopping, 60% for super market shopping and 74% to visit the bank or building society. In terms of the range of shops and the range of eating in Bromsgrove, half (51%) of the respondents considered the range of shops as very poor and 64% considered the range of eating and drinking as either poor or adequate.
- 4.100 The survey results also showed that Bromsgrove was the most popular centre for residents, with 34% shopping in Bromsgrove the most, 21% in Redditch and the remainder scattered among numerous other settlements. Bromsgrove was also the most popular place in terms of socialising, with a total of 48% of respondents socialising most in Bromsgrove, 16% in Birmingham and 10% in Worcester.
- 4.101 Respondents considered that more independent and specialist shops (63%), a department store (59%), more national chain stores (53%), regular farmers markets (44%), occasional special markets such as French Street Market (39%) and a high quality national food store for the Market Hall site (39%) would help improve the attractiveness of the town centre as a shopping location. Marks and Spencer (41%) is the retailer that most respondents want to see represented in the town.
- 4.102 In terms of the town's attraction in the evening, the most likely choices to attract respondents were a safe environment (59%), restaurants and cafes (55%) and a theatre or cinema (56%). A massive 97% of respondents stated they were more likely to shop and socialise in Bromsgrove if the changes selected were implemented.
- 4.103 Locationally, most respondents prefer to see shops and restaurants spreading along the length of the High Street. Such arrangement would improve opportunities for natural surveillance along the whole street at different times of the day, create a sense of vibrancy and reduce the possibility of crime.
- 4.104 In terms of travelling to the town centre respondents would rather use their car over any other mode of transport. Though walking was rated fairly highly, the use of bus was not; the highest figure gained was 20% of respondents using a bus to get to school. Less than one in ten would cycle to work. Taxis

are only used for socialising and eating/drinking purposes (11% and 6% respectively). Motorbikes, community transport and train are rarely used.

- 4.105 In terms of what actions would benefit residents in getting around the town, over half (56%) desire an improved bus link between the town centre and the train station, with a third (35%) requested improved walking/cycling routes and a third (31%) requested improved signage. For car users, almost two-thirds (61%) want improvements to the junction of Stourbridge and Birmingham Roads, and almost half (47%) want more short stay car parking spaces. Almost a quarter (23%) want to see a one-way system in Windsor Street, while a fifth (20%) would like to see roads such as the Strand opened to traffic. A fifth (19%) also want to see a linking road between the town centre and the A38. Approximately a sixth of consultees (16%) want new multi-storey car parks, while less than one in ten (7%) want to see traffic reinstated on the High Street.
- 4.106 Over half (57%) stated that the pedestrian routes into the High Street should be de-cluttered, while almost half (43%) want extensions to existing walking/cycling routes and signage improved. A third (35%) want to see traffic calming measures within the town centre, but only one in nine (15%) want to see Market Street closed, with just one in ten (11%) stating that car parking spaces should be reduced. Approximately a half (52%) want bus stops retained in their current location, while a fifth (19%) would like to see the bus station move to Windsor Street.
- 4.107 The survey also highlighted what people highlighted as actions to make the town centre a nicer environment to visit. Prioritising works to enhance the historical heritage of Bromsgrove was the most popular response; namely shop frontages blending with local architecture (65%) and improving the appearance of historic buildings (55%). Half of the respondents (52%) selected new paving and landscaping, and half again (50%) chose more frequent litter patrols. Also factoring highly was the removal of bollards (42%), improved seating (38%) and more squares and open spaces (37%). Respondents did not consider improved lighting and increased public art to be a priority.
- 4.108 In regards to working and living in the town centre; over three quarters of respondents (80%) desired more people living in Bromsgrove and the majority of consultees (88%) desired more people working in Bromsgrove. 74% of respondents stated that they wanted to see several smaller new employment sites compared to 26% preferring larger employment sites.
- 4.109 There were numerous responses to the both the Draft Town Centre AAP and the Town Centre Regeneration policy within the Draft Core Strategy 2. There was widespread support for the regeneration of the town centre with very few

changes actually sought to the policies. Overall support for the naturalisation of the Spadesbourne Brook was noted with some respondents concerned it would impact the trading access to businesses in the town centre. The policy seeks to encourage the naturalisation of specific parts of the Spadesbourne Brook especially in areas that will allow for greater use by local residents whilst not to the detriment of local businesses.

- 4.110 Some respondents felt the DCS2 policy should go into greater detail on the evening economy with others suggesting that a specific housing target for the town centre would be beneficial. The emerging District Plan intends to include references on the evening economy and will provide adequate support to allow such development to take place within the Town Centre. In addition an Evening Economy Group was established so that local businesses and interested parties could directly influence the economic potential of Bromsgrove Town Centre in the evening.
- 4.111 In terms of housing numbers it is difficult at this stage to anticipate numbers that could be achieved, partly due to the mixed use opportunities at certain sites and the uncertainties linked to viability and it is considered that any Town Centre housing would provide a windfall gain. The rationale for not incorporating a specific number of residential units in the Town Centre is that it is very difficult to estimate what capacity each site could contain. At this stage specific targets are almost impossible to determine and once developers seek to progress with the sites, only then will a realistic target be known and worth referencing.
- 4.112 Some respondents wanted to encourage independent retailers whilst others recognised the potential to attract a large retailer to the Town Centre. The emerging District Plan will recognise the importance of small and independent businesses to Bromsgrove and their role to play in Bromsgrove in offering alternative shopping choices to the large retailers. In addition it will seek a balanced approach in terms of providing the physical space for nationally established retailers whilst also safeguarding the smaller boutique style independent retailers. It is important for Bromsgrove Town Centre to adapt to the modern requirements for retail so that Bromsgrove Town Centre is a positive environment for retailers.
- 4.113 Several respondents to the DCS2 referred to specific development sites with some seeking improvements to the existing sports hall and support for the Sainsbury's development. In terms of specific sites and in line with the Draft AAP, the emerging District Plan will incorporate the 10 development sites within the Town Centre to emphasize the Councils support of Town Centre regeneration. This includes School Drive site which encourages a new leisure centre and the proposal for a Sainsbury's supermarket on the Birmingham Road Retail Park which received planning permission on 28 June 2010.

Perception of safety and occurrence of crime

4.114 Bromsgrove town centre lies within the St. Johns ward and is served by the Bromsgrove St. Johns Local Policing Team of West Mercia Constabulary North Worcestershire Division.

4.115 Compared to the crime figures of Bromsgrove town centre in 2008-09, there was an overall reduction in the total number of crimes committed across the town centre. Total crime is made up of the seven comparator crime types, e.g. criminal damage and any other miscellaneous crime categories such as arson and shoplifting. As the table below shows, there was a fall in criminal damage and theft from a vehicle, but a rise in most other offences. Anti-social behaviour is recorded on separately from the other crime types by West Mercia Constabulary's OIS database, and shows a significant reduction since 2008-09. St. Johns ward has remained the worse (rank 1) ward in terms of total crimes across the District. This is fully expected as this is the most urban and frequently used ward, especially late at night where people go to socialise and are subjected to alcohol.

	2008-09 (Count)	2009-10 (Count)	2010-11 (Count)	Change in % (2008-11)
Criminal Damage	186	145	130	-30%
Assault w/o injury	32	46	52	62%
Assault with injury	120	123	151	26%
Burglary Dwelling	15	8	21	40%
Burglary Other	34	36	47	38%
Theft from vehicle	27	22	23	-15%
Theft of vehicle	2	6	6	300%
Drugs	28	20	38	36%
Total Crime	874	770	831	-5%
Rank in Bromsgrove (Wards)	1	1	1	0%
Anti-social behaviour	1155	339	803	-31%

Source: West Mercia Constabulary (2011)

4.116 The July 2013 monthly crime report (Worcestershire County Council, 2013) shows all the offences per ward throughout the District, which includes burglary, criminal damage, vehicle crime and assault. There were 47 offences recorded in July 2013 in St. John's ward, followed by 33 in Charford and 27 in Whitford. There were also 72 anti-social behaviour incidents reported in St. John's ward, followed by 30 in Charford and 29 in Sidemoor.

- 4.117 There are 20 CCTV cameras in the town centre area and they operate 24 hours. The cameras are designed to create a “net” over the centre in which they operate. The idea is that a person cannot enter or leave the main shopping areas without passing at least one camera. They record and are monitored 24 hours a day, 365 days a year. They have the ability to identify an offender by their face and by their clothes at a fair distance. The police can view incidents as they occur, track a person’s movement and direct officers to the location of an incident.
- 4.118 The cameras play a vital role against crime by addressing specific problems such as alcohol related violence in the town centre, acting as a deterrent to potential offenders and by reducing the fear of crime amongst the local community. The cameras are a real time colour system and operate in conjunction with radio link projects such as Shop Watch, Pub Watch and we have direct links to West Mercia Police both on the ground as well as their Central Operation Room in Hindlip
- 4.119 All car parks run by the Council in Bromsgrove town centre are also covered by CCTV cameras and this helps reduce the risk of car related crime. All CCTV cameras are governed by very strict operating guidelines that work in line with the latest data protection code to prevent breaches of privacy and civil liberties. Even though there is already a good use of CCTV across the town centre the regeneration opportunities identified in the emerging District Plan will provide opportunities to maximise the safety of the Town Centre by encouraging active uses, natural surveillance, and the creation of an effective CCTV network within public realm proposals.
- 4.120 The High Street in Bromsgrove town centre is a pedestrianised area and it creates a strong sense of enclosure. Although this creates a nice shopping environment, it affects the perception of safety to pedestrians after dark. The high enclosure means that pass-by traffic is unlikely to see what is going on in the street. The upper floors of shops currently are mainly used as shop storage or offices and there is a lack of natural surveillance outside shops’ trading hours and office hours.
- 4.121 In the Bromsgrove Town Centre AAP survey (2008), respondents (59%) considered that a safe environment is the most important thing that will attract them into Bromsgrove Town Centre in the evening.

State of the town centre environmental quality

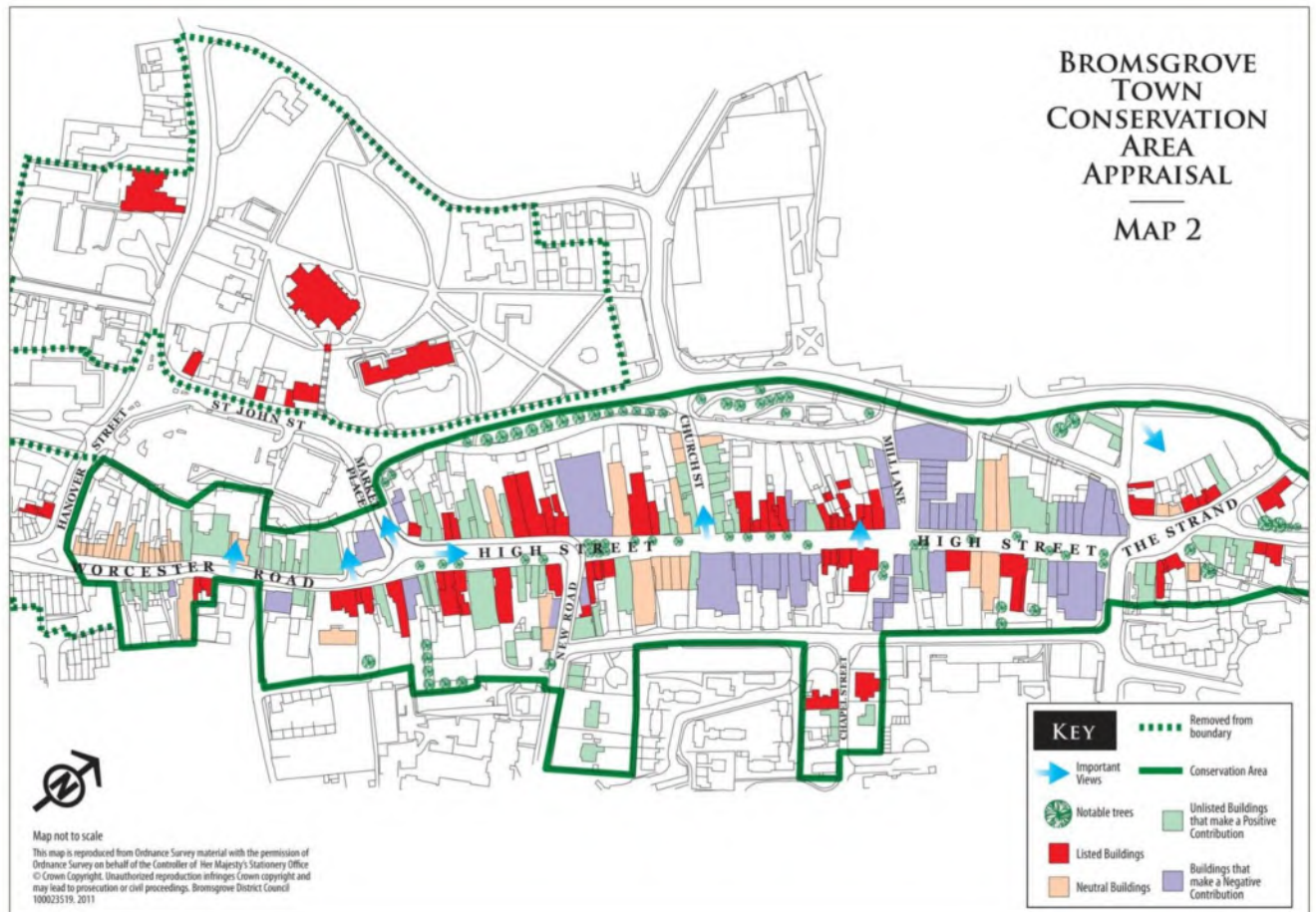
Environment

- 4.122 The major transport routes such as Birmingham Road, Kidderminster Road, Worcester Road, Stourbridge Road entering Bromsgrove are all poorly defined. There are no gateway features to inform people their entrance to Bromsgrove town centre. The image of the town to passing traffic is bad. It is dominated by the rear views of the High Street such as Crown Close and Windsor Street. These areas are mainly the backs of buildings used for parking and have poor boundary treatment. Similarly, there is a lack of enclosure to the town centre car parks and the streetscape is often left open and poorly defined. The connecting routes that link the car parks and surrounding roads to the High Street are enclosed by poor quality buildings and blank side elevations.
- 4.123 The traditional High Street with deep plots and narrow commercial frontages contribute to a strong character in the town centre. Whilst this character is typically at odds to the scale and form of development sought by many modern retailers, it is this character that is one of the town's core and key strengths, contributing strongly to the attractiveness of the town.
- 4.124 In the Bromsgrove Town Centre AAP survey (2008), the top five choices of respondents that would make the town centre a nicer environment to visit are: 1) making the look of shop fronts and signs in keeping with historic architecture (56%); 2) New paving (54%); 3) more frequent litter patrols (52%); 4) more landscaping and trees in the High Street (48%); and 5) improved appearance of historic buildings (47%). In regards of The Recreation Ground in front of Asda, respondents would like to see the landscaping, planting and facilities on the site be improved (42%).
- 4.125 Following on from these respondent views, some works are already underway to improve the Town Centre. The Bromsgrove Townscape Heritage Initiative (THI) is a new £1.6 million scheme which aims to regenerate the town centre by working in partnership with local businesses and other partners to repair and enhance historic properties on High Street and Worcester Road. The scheme is jointly funded by the Heritage Lottery Fund, Worcestershire County Council and Bromsgrove District Council. It has already seen some shopfronts restored to look like they originally did, which improves the appearance of the area. There are currently more premises enquiring about this scheme. There has also been public realm works started at the southern end of the High Street towards Worcester Road, where new paving has been put down.

The Historic Environment

4.126 The town centre has a variety of building styles, with no one style dominating. All of these add to the character of the town. The following map is extracted from the Bromsgrove Town Conservation Area Appraisal 2011. It outlines the boundary of the town centre conservation area and buildings that are protected, or are making positive/negative contribution to the area.

Fig. 8: Bromsgrove Town Conservation Area



4.127 A new St. John's Conservation Area was designated on 1st June 2011 by the Council's Cabinet incorporating part of the Bromsgrove Town Conservation Area, Bromsgrove Cemetery and some additional properties on Church Lane, Church Road and Crown Close. Formal amendments were also made to the Bromsgrove Town Conservation Area boundary to remove properties to the west of Hanover Place and the section of St. Johns which was transferred to the new St. Johns area.

4.128 Bromsgrove town centre contains an assortment of notable historic buildings dating from predominantly the 18th and 19th centuries but with some earlier surviving timber framed buildings. A range of architectural styles is

represented from English vernacular, to restrained Georgian and more elaborate Victorian Gothic buildings. This variety of elevational treatments and styles demonstrate high quality construction and craftsmanship, giving a rich texture to the town centre, and are tangible reminders of the town's past prosperity.

4.129 The High Street and immediate vicinity clearly exhibit a number of medieval elements. The churchyard lies immediately to the West of the town on an area of raised ground overlooking the main road. This area may have been the site of an earlier Anglo Saxon Church, but the earliest remnants in the existing Church date from the 12th century. The street system in and around the High Street is very clearly medieval, consisting of the main South West /North East route between Worcester and Birmingham which is the High Street itself. From this road two roads go off to the West (Kidderminster Road and Stourbridge Road) and one to the East (Stratford Road). These roads are probably of medieval date along with Hanover Street and St John Street, which lead to the Church.

4.120 The elongated pattern of development within the town centre means that it is not possible to view the Conservation Area in its entirety from any one point. Views of the Grade I listed St John's Church are also possible from gaps between the buildings on Worcester Road and from the Market Place. Unfortunately, the poorly landscaped area on Mill Lane detracts from views through to the Spadesbourne Brook. The view from High Street to Market Place has been spoilt by the loss of the old Town Hall in the 1930s and its replacement with a bulky modern office building.

4.121 The original medieval burgage plots resulted in a number of narrow units, with significant ancillary accommodation to the rear, some now in unconnected uses. The rear workshops were originally part of the nail-making industry in Bromsgrove. The upper floors of some buildings (particularly at the Southern end of the High Street) are relatively grand indicating that they were originally constructed as houses for wealthy merchants. Unfortunately many of the ground floors have been altered extensively and often unsympathetically to accommodate modern retail uses. The buildings within the Bromsgrove Town Conservation Area are now predominately in retail use with a mixture of A1, A2, A3, A4 and A5 uses - traditional retail, financial institutions and some pubs and cafes. Some upper floors are in ancillary use, office space and storage; many others are vacant which has led to some condition and maintenance problems. Worcester Road is very much a secondary street to the High Street, with smaller local retail units.

4.122 Three other areas within the Conservation Area boundary are notable for their amenity value as a result of their possession of both some tree cover

together with seating areas. These are the area adjacent to Strand House and Cupitts Jewellers, a small area on the corner of Market Place and Market Street, and the High Street itself. At the two sites at The Strand and the Market Place, the presence of large mature trees provides a contrast with the built environment and shading and cooling effect on hot summer days. The trees also contribute significantly to improved local air quality. The amenity of all three sites suffers considerably however, from traffic noise & dust as a result of their close proximity to major roads through the town centre.

- 4.123 Along the High Street itself, a number of trees were planted over the last 30 years as part of past improvements. Although earlier in 2012 they were all removed, in order for pedestrian improvements to take place. New trees will be planted in more strategic locations so they can contribute to the amenity of the area by providing shading and improved air quality in summer, a medium for Christmas lights in winter, and visual amenity all year round. The trees that have been removed caused a number of problems, such as the obscuring of sight lines for both amenity value and CCTV purposes, maintenance and issues of encroachment close to nearby buildings, and the effects of roots on paving and surfacing. For the most part, these problems are the consequence of poor planning, design and tree species selection in previous years which has resulted in incompatible positioning of trees, CCTV cameras and other street furniture. Unsuitable positioning and surfacing around trees has directly led to trees damaging paving and also tree loss. All of these problems can be reduced or avoided by correct selection, siting and design of new replacement trees, which are expected when the pedestrian improvements take place.

Trees and landscaping

- 4.124 The town centre only has one significant green space around the Bus Station area and the adjacent section running along Crown Close/Market Street to the Market Place junction. Whilst this area is of considerable amenity value relative to the built environment of the rest of the town centre, the effect is reduced considerably at times due to the close proximity of the busy traffic running along Market Street and the considerable noise and dust that results.
- 4.125 The Spadesbourne Brook runs along the whole length of the Conservation Area from the rear of properties on The Strand down to Hanover Street in the South-East. The larger part of the brook course has been heavily canalised and culverted with several sections disappearing completely. Despite this, the brook still retains considerable value for biodiversity and provides an essential wildlife corridor through the town centre for a number of species including Brown Trout and Water Voles, both of which have been recorded where the course passes through the Bus Station site.

4.126 Only about 10% of the channel within the town centre is naturalized and of both wildlife and amenity value. 30% of the course is hidden within closed culverts beneath roads & buildings and 60% in steep sided canal sections providing little opportunity for wildlife habitat other than that 'passing through'. Within this, the naturalized area at the Bus Station site provides an important 'stepping stone' for wildlife using the corridor but this 1km section still forms fairly hostile territory for most species. Naturalization of additional sections of the brook course would greatly improve this situation and increase the biodiversity value both locally and for wildlife habitats further up and down the brook. In particular, aiding and allowing Water Vole colonies to intermix can be a vital factor in their survival.

Air pollution

4.127 The Council has been monitoring the air quality in the District against several health based air quality objectives. As of June 2011, there are now a total of four Air Quality Management Areas (AQMAs) across Bromsgrove. The first is located at Junction 1 of the M42 at Lickey End in Bromsgrove, the second is located at Kidderminster Road, Hagley and the third is located at Redditch Road, Stoke Heath. Each of these AQMAs has been declared as a result of measured or predicted exceedences of the annual mean objective for nitrogen dioxide due to road traffic emissions. Other pollution sources, including commercial, industrial and domestic sources, also make a contribution to background pollution concentrations.

4.128 The fourth and most recent AQMA is designated within the town centre and stretches from Hanover Place at the bottom of the centre along Worcester Road (as evident in Fig. X). A 2008 progress report identified exceedences in nitrogen dioxide in a number of areas across the town centre. As a result of the report findings a continuous monitoring site was installed at Worcester Road and a detailed traffic survey within Bromsgrove town centre was undertaken.

Fig. 9: Worcester Road AQMA



4.129 The Detailed Assessment was completed in July 2010 and concluded that the air quality objective for nitrogen dioxide was being exceeded in Worcester Road. The report has been accepted by the Department for Environment, Food and Rural Affairs (DEFRA) as satisfactory. The Detailed Assessment concluded that there are predicted exceedances of the annual mean nitrogen dioxide Air Quality Strategy objective of $40\mu\text{g}/\text{m}^3$ at sensitive ground floor and first floor receptors along the Worcester Road. The maximum modelled annual mean nitrogen dioxide concentration in 2009 was $51.5\mu\text{g}/\text{m}^3$. Annual mean nitrogen dioxide contour plots show that where receptors fall outside of the $40\mu\text{g}/\text{m}^3$ contour at ground-floor level, they tend to fall within the $36\mu\text{g}/\text{m}^3$ contour. There is some uncertainty surrounding both the measured and modelled concentrations. An AQMA was then declared to include, as a minimum, those residential properties that lie within the $36\mu\text{g}/\text{m}^3$ contour to be precautionary, and approved by members in June 2011.

4.130 Birmingham Road in Bromsgrove town centre is a potential location for future Detailed Assessment. However, the Council has been monitoring nitrogen dioxide using diffusion tubes at three worst-case locations on Birmingham Road. The results show that the annual mean objective for nitrogen dioxide has been met there for the last three years. Bromsgrove District Council will continue to monitor nitrogen dioxide concentrations on Birmingham Road and will proceed to a Detailed Assessment if exceedances of the annual mean objective are measured in the future.

5. Conclusion

- 5.1 The 2013 Bromsgrove Town Centre Health Check follows on from the 2009, 2010, 2011 and 2012 documents, monitoring vitality and viability through the consideration of economic, environmental and social factors. Bromsgrove District Council has identified that a holistic approach to the redevelopment of the town centre is required, that takes into account the prime sites for regeneration and includes systematic consideration of other opportunities. The annual Town Centre Health Checks are a vital component to this regeneration process and a useful evidence based tool for the emerging Bromsgrove District Plan.
- 5.2 In 2011, the Council published a draft Town Centre Area Action Plan (AAP), as well as a draft Core Strategy 2, which had a policy dedicated to the Bromsgrove Town Centre. These documents combined gave a clear insight in to the Council's spatial plan for the town centre identifying not only the long term vision for future regeneration but also provided detailed policies to guide smaller scale development in the town centre. Clear aims and objectives were set, including the type and scope of developments; enhancements to the public realm, the economy, public services and transport initiatives. The Council no longer intends to publish an AAP and instead will put the more detailed elements of this document into a town centre based policy within the emerging District Plan. This is in order to give maximum weight to the regeneration process and be more beneficial in terms of improving vitality and viability. The annual Health Check will be used to monitor the progress of this policy.
- 5.3 In the town centre, 152 (43.7%) of the groundfloor use is for retail (A1) purposes, which is the predominant use in the centre. These figures have remained high since the first Health check survey in 2009, which is a generally positive notion across the town centre, although it must be noted that there were 7 A1 use units lost in comparison to the 2012 survey. Despite the high percentage of the amount of retail floorspace, half of Bromsgrove's respondents to the 2008 survey, considered the range of shops as very poor but the range of eating as adequate/good. This survey also showed that Bromsgrove was the most popular destination for residents with a third using Bromsgrove as their main shopping centre.
- 5.4 Respondents considered that more independent and specialist shops, a department store, more national chain stores, regular farmers markets, occasional special markets such as French Street Market and a high quality national food store for the Market Hall site would help improve the attractiveness of the town centre as a shopping location. Marks and Spencer is the retailer that most respondents want to see represented in the town. The farmers market now occurs in Bromsgrove on the second Saturday of each month and has done for a number of years. It is clear from the pedestrian footfall that these markets have a significant impact on increasing pedestrian numbers.

- 5.5 The use in the town centre has only seen minor changes since last year's survey. The number of retail units (A1) is the most notable as mentioned with a decrease of 7 units; D1 units increased by 2 units; A3 and A5 increased by 1 unit, as did Sui Generis units. All remaining uses stayed the same number of units. Vacant units increased from 38 to 40 units. This is the first year since 2009 that vacancy rates have increased, however the number of vacant units is significantly better than they were in 2009 at 50. The Goad Category Report (September 2012) indicates Bromsgrove to have a vacancy rate of 10.55% and the in house survey (which covers a larger area) indicates a vacancy rate of 11.5%. The Shop Vacancy Report published by the Local Data Company in May 2013 shows some alarming figures on the state of the country's town centres. The proportion of empty units in the UK's top 650 town centres is 14.2% and there are a number of West Midland towns that are particularly suffering. The Goad Category Report also highlights the National average is 12.16%. Bromsgrove's rate is considerably lower than other centres nationally and particularly the region. Although this is encouraging and a negative correlation exists from the baseline survey in 2009 until it went up slightly this year; there are still a number of vacant units which need to be put in to constructive use. The emerging District Plan will be a fundamental tool in achieving this. A worrying figure stemming from the Goad Category Report was that vacancies mainly occur in larger units, indicating that the vacancy rate in terms of floorspace is actually higher than the UK national average.
- 5.6 The publication of the Draft Town Centre AAP in 2011 highlighted the potential capacity for growth across Bromsgrove Town. A total of ten sites were proposed as development opportunities, whether they were retail prospects, employment, housing or community, leisure and cultural uses. Overall, a number of regeneration possibilities exist which can improve Bromsgrove. These sites are going to be carried forward as part of the Town Centre Policy within the emerging District Plan.
- 5.7 There were changes made this year to the recording of pedestrian movement (footfall), which made comparisons with previous year's results difficult. The number of locations where footfall was recorded includes more locations and also more appropriate locations in order to obtain the best data. The new location points introduced cover a larger proportion of the Town Centre and are located near to proposed development / regeneration opportunities. As time progresses and these developments are completed it will be easier to trace whether foot fall has been affected by these developments. There were only three locations that could be compared with previous results, which showed there was a decrease in the number of pedestrians compared with 2012. Although location 5 in fact had a small increase and location 6 a small decrease; Location 2 significantly reduced by 332 people. It is hard to determine exactly why this big difference occurred, but it could be partially explained by this location being 'counted' slightly later than usual as a new location point was added before it. This meant that some of the footfall in the afternoon from pupils leaving Bromsgrove North High School (which is in close proximity to this area) would be missed. However, more details can be collated and analysed in subsequent years.

- 5.8 In line with previous years, the market day in the week had a higher footfall than the weekday without a market. This year there were 2235 pedestrians recorded on the non-market day and 2933 on the market day in the week, indicating a 23.8%. The difference in non-market days in contrast to market days was consistent over the five year data sets, which indicates the market has a positive effect on pedestrian numbers. The 2013 survey indicates that the busiest location over the three days was location point 6 with a total of 1847 pedestrians. This point was also the busiest in 2010. The busiest point in 2011 was location 5 (Asda crossing) and in 2012 it was location point 2 (near Argos). The reason for location point 6 being the busiest this year is uncertain. When this location was busiest in 2010, this could be accounted for by the opening of Poundland in the former retail space where Woolworths was situated. This store is still actively used by pedestrians. There are also three car parks in close proximity to this location point allowing good access to the Town Centre. Now there are more location points monitored and there are a number of potential development sites across the town, succeeding years will illustrate the locations that are more actively used as a result of regeneration.
- 5.9 Unfortunately it is difficult to tell if the Town Centre is improving and attracting more visitors solely based on these results, but as years go by this information will be more apparent. However, based on previous year's results there appears to be a growing trend that the town centre is getting busier. The Saturday Farmers market was particularly higher as the years have progressed.
- 5.10 Bromsgrove remains an accessible location by as visitors can access the town centre via train, bus, taxis, on foot, bicycle and car. The proposed new railway station and more frequent services will enhance the numbers of people accessing the centre, especially with improved links from the centre to the station as illustrated in the Draft AAP. These proposals will be incorporated into the emerging District Plan with the aspiration to make the Town Centre more accessible to those who live a little further away, by providing them with improved walking, cycling and bus routes into their Town Centre.
- 5.11 Since 2008/09 there has been an improvement in terms of crime and perception of safety across the town centre, as the number of crimes has reduced. St. Johns ward (which covers the Town Centre) has remained the worst (rank 1) ward in terms of total crimes across the District. This is fully expected as this is the most urban and frequently used ward, especially late at night where people go to socialise and are subjected to alcohol.
- 5.12 Although there was an increase in the number of vacant units, overall, the Town Centre Health Check 2013 has a very positive outlook on the town centre and is showing progressive improvement year on year. This is specifically relevant for the potential development sites, which highlight where perspective regeneration and improvements can be made. Due to changes in the footfall monitoring comparisons could not be made, so this indicator can be observed in

subsequent years. Obviously a centre with more people means businesses make more and other businesses are attracted to Bromsgrove.

5.13 Other notable outcomes of the 2013 Health Check were the town centre remains dominated by A Class Uses, as they make up 86% of all uses. A1 use is the predominant use accounting for 43.7% (152 out of 348 units) of all uses, especially in the Primary Shopping Area where it accounts for 69.1% (105 out of 152 units). However, there was a reduction of seven A1 units in 2012, four of which were in the PSA. Marginal changes occurred elsewhere within other uses. Comparison goods make up 32% of all sectors, with leisure in second place with 19%. A number of multiple retailers exist within Bromsgrove, however, only a small number of major retailers (as defined by the Goad Category Report) exist, none of which are department stores or supermarkets. It must be noted that planning permission has been granted for a Sainsbury's, although construction work is yet to begin. A negative outcome derived from this year's Health Check is the reduction in shopping rents. Rents reduced across most of the West Midlands in line with the current state of the economy. However, Bromsgrove has one of the largest reductions in terms of percentage (11.1%) with a reduction in shopping rents from £45 per sq. ft. in 2011 to £40 per sq. ft. in 2012

5.14 The Town Centre Health Check demonstrates that Bromsgrove is still a reasonably vital and viable town centre and has growth potential. Nevertheless, Bromsgrove is a strong competing sub-regional centre which should be able to successfully attract and accommodate retailers. The ongoing regeneration opportunities across the town centre, including the BHI Parkside Medical Centre, and plans for a new civic centre and relocated library will assist with this, although further development is also required in order to improve the town centre's performance. At the moment discussions are underway for elderly housing opportunities across Recreation Road and a mixed use scheme at the former Market Hall site. The local planning authority and its regeneration partners have provided a very good starting point for this process within the suite of projects outlined in the emerging District plan. The previous chapter also gives more of an insight into the potential regeneration opportunities that exist.

5.15 From the indicators established and reviewed regarding vitality and viability, the strengths, weaknesses, opportunities and threats are identified in a SWOT analysis for Bromsgrove town centre:

Strengths

- National multiples present (mixed goods, clothing and other retailers) - although limited
- Good bus station location
- Pedestrianisation of the main shopping areas
- Town centre Conservation Areas

- Regular street markets (including monthly farmer's market)
- Good network of CCTVs
- Relatively flat topography of the town
- Draft Town Centre AAP published (will subsequently be incorporated into the emerging District Plan)
- Shopmobility scheme
- Improved Car Parking methods at ASDA car park
- Leisure Facilities at Dolphin Centre
- Access to schools
- Low unemployment levels

Weaknesses

- Limited retail and food offer (compared to other centres)
- Closure of the Tourist Information Centre
- Insufficient short stay parking
- Poor and irregular connections to the train station
- Busy and poor crossings to the main shopping areas
- Poor facilities for cyclists
- Busy traffic at the Stourbridge Road and Birmingham Road junction
- Littering
- Poor quality façades, especially shops on Worcester Road
- Poor rear view and function of High Street
- Poor image of town centre to pass-by traffic
- Limited natural surveillance at night time
- Limited focal points across centre
- Lack of residential accommodation in town centre

- Number of vacant units
- State of Public realm

Opportunities

- National multiples (department store and supermarket) and retail and food offer at the potential development sites
- More frequent farmers' or specialised markets
- Pedestrianisation of Market Street
- New link road to connect the town centre and A38
- New train station
- Regular connections with the new train station
- Improved signage and walking/cycling network to encourage sustainable travel
- Environmental improvement at the Spadebourne Brook and High Street
- More frequent litter patrols
- Night time economy
- Efficient use of rear areas of main shopping areas
- More quality shops to meet the potential demand of the relatively high income residents
- To build on the strong services growth in the region
- New shop frontages
- Town Heritage Initiative
- Close proximity to Sanders Park
- Number of vacant units
- Potential development sites identified in emerging District Plan
- Re-opening of Bromsgrove Museum and tourist information
- Public realm improvements

- Involve young people in developing and improving services

Threats

- Town Centre AQMA designation
- Potential increase of crime levels
- Number of A5 uses concentrated around Worcester Road
- Funding mechanisms
- Proximity and competition from other centres
- Insensitive development
- Strain on infrastructure
- Traffic congestion
- Out-of-centre development

6. Recommendations

- 6.1 The Bromsgrove town centre health checks are scheduled to be carried out annually and there are various recommendations that would ensure that the next report improves and builds upon the initial 2009, 2010, 2011, 2012 and 2013 'baseline' reports. In subsequent years, comparisons will be able to be made within Bromsgrove over a period of time.
- 6.2 One of the survey data, diversity of uses, focused on the different uses of commercial properties in and around the town centre. The data analysed property use class, however, this data was only based on the ground floor of properties and did not take into consideration any businesses that were situated on the upper floors. In order to give a more accurate picture of the use class of the town centre, these other floors would have to be considered, although in previous years it has been very difficult obtaining this data. Many floors above shops are in different ownership or simply used for storage and/or is vacant. Another area that would benefit the Health Check report would be the location and quantity of residential properties in the town, although this may be difficult to monitor, especially above existing commercial uses.
- 6.3 The Health Check should be used as an informed evidence base document for the emerging District Plan and should where possible update the majority of information on a yearly basis. However, some statistics and data are difficult to obtain annually, or have large costs to acquire, such as the town Goad Plan. Where possible, surveys should be conducted as frequently as possible to ensure the most relevant and up to date evidence to inform the District Plan and other strategic planning documents. This year it was agreed to purchase the most recent Goad Plan as the original was somewhat outdated and based on figures recorded in 2008. As the Health Check should be informed by up-to-date information a Goad Plan with a survey date of September 2012 was used to give a true representation of the Town Centre.
- 6.4 Pedestrian flows analysed the footfall counts that had taken place within the town. As they had taken place on a 'normal' weekday, a market day and a Saturday market day, it was not possible to estimate a weekly footfall count without including a footfall on a Sunday, which could be considered next time. However, due to the majority of retail units being closed on Sunday's it may not be a valuable exercise. There is also the possibility of assessing footfall in the evening to determine the main uses of the town during the night-time economy. In the past, other strategic planning commitments meant footfall was recorded at different times of the year, albeit only one month, but this could still produce discrepancies. For consistency the surveys should be carried out at the same time annually to provide more comparable data, which was the intention in 2013. It is envisaged that July will be the month that surveys are conducted, also including a Saturday farmers market for reliable comparisons.
- 6.5 As recommended in previous editions of the Health Check it was recommended that alterations to the pedestrian counts, particularly regarding

location to incorporate a number of regeneration opportunities across the Town. New locations further up Birmingham Road and towards the start of Worcester Road were added in order to get a true representation of footfall across the centre. Points 3 and 4 were changed as they were only counted in one direction in the past and to include both directions created greater consistency with other location points. These two areas are extremely busy, but previously appeared to have fewer pedestrians than other points as only one direction is counted. Now that these improvements have taken place, no further recommendations are expected as comprehensive comparisons will be able to take place in future surveys.

- 6.6 There could also be more in depth information acquired concerning the accessibility of the town centre. This could include more information on public transport links, especially bus frequencies and locations. Possible maps could indicate the main access points of the centre. In the past it has been difficult obtaining recent data regarding shopping rents and commercial yields. In future Health Checks it could be beneficial to find this data as both data sets are useful tools in measuring the performance of the Town Centre.
- 6.7 As investment and regeneration takes place across Bromsgrove town centre, details of future proposals and developments can be analysed. The perception of town centre shoppers should be reviewed during updates to this report in order to see if their opinions indicate positive changes to the area. The current 2008 survey is becoming outdated and should be revised to indicate how residents/shoppers perception of Bromsgrove Town Centre Changes over time. Although consultations on the emerging District Plan give a clear insight into resident's opinions, the results are less structured than a survey which provides quantitative data which is easily analysed.

Appendix A: Glossary

Term	Definition
Commercial yield	The commercial yields on non-domestic property shows the capital value of the non-domestic properties in relation to their expected market rents. Broadly speaking, low yields indicate that a town is considered to be attractive and as a result be more likely to attract investment than a town with high yields.
Comparison shopping	Comparison retailing is the provision of items not obtained on a frequent basis. These include clothing, footwear, household and recreational goods.
Convenience shopping	Convenience retailing is the provision of everyday essential items, including food, drinks, newspapers/magazines and confectionery.
Economically active	People are considered to be economically active if they are aged 16 and over and are either in work or actively looking for work.
Edge of centre	For retail purposes, a location that is well connected to and within easy walking distance (i.e. up to 300 metres) of the primary shopping area.
Gross value added (GVA)	Gross value added is the value of goods and services produced by an area, sector or producer minus the cost of the raw materials and other inputs used to produce them.
Heritage Asset	A building, monument, site, place, area or landscape identified as having a degree of significance meriting consideration in planning decisions, because of its heritage interest. Heritage asset includes designated heritage assets and assets identified by the local planning authority (including local listing).
House affordability	The house affordability ratio is a measurement of the average annual income to the average house price.
Index of multiple deprivation	The Index of Multiple Deprivation combines a number of indicators, chosen to cover a range of economic, social and housing issues, into a single deprivation score for each small area in England. This allows each area to be ranked relative to one another according to their level of deprivation.
Listed Building	A building of special architectural or historic interest, graded I, II* or II with grade I being the highest. Listing includes the interior as well as the exterior of the building and any permanent structures (e.g. walls within its curtilage).
Major retailer	Among all the multiple outlets, Goad has further identified 30 retailers that are most likely to improve the consumer appeal of a centre and named them as Major Retailers.
Multiple retailer / national multiple	A multiple retailer/ national multiple is defined as being part of a network of nine or more outlets. The presence of multiple outlets can greatly enhance the appeal of a centre to local consumers.
Primary shopping area (PSA)	The defined area where retail development is concentrated. It is likely to include a high proportion of retail uses.

Term	Definition
Secondary shopping area (SSA)	Secondary shopping area is usually contiguous and closely related to the primary shopping area. It provides greater opportunities for a diversity of uses.
Shop-mobility	Shop-mobility is a service that helps all people who consider themselves to have mobility problems (whether through disability, illness or injury) to continue to get around the town centre independently, with freedom, confidence and dignity.
Sustainable Development	<p>A widely used definition drawn up by the World Commission on Environment and Development in 1987: <i>“Development that meets the needs of the present without compromising the ability of future generations to meet their own needs”</i>. The Government’s four aims, to be achieved simultaneously are:</p> <ul style="list-style-type: none"> • Social progress which recognises the needs of everyone • Effective protection of the environment • Prudent use of natural resources • Maintenance of high and stable levels of economic growth and employment.
Use Class	The Town and Country Planning (Use Classes) Order 1987 puts uses of land and buildings into various categories by the way in which land or buildings are used. Planning permission is not needed for changes of use within the same use class.
Viability	To be capable of existing or surviving in a successful manner. The term is often used in the context of whether town centres are able to exist as viable retail centres. Financial viability is about being able to generate sufficient income to meet overheads and allow growth whilst still being able to maintain service levels.
Vitality	Used to describe the liveliness of an area, which may be measured by particular local features, the general environment or the quality of life for local residents. In the context of town centres, this term can be used to describe the capacity of a centre to grow or develop.
Zone A rent	Zone A rent refers to the rental value for the first 6 metres depth of floorspace in retail units from the shop window and it is the most valuable area of the shop. Normally the rate per square metre drops as it moves towards the rear of the shop.

Appendix B: Street surveys record of Bromsgrove Town Centre (2013)

Primary shopping area			
Business Name	No	Street	Class
Phone Club	3	Chapel Street	A1
Scruples salon	7	Chapel Street	A1
Bromsgrove Sports	1	Church Street	A1
Spex 4 U	1	Church Street	A1
Cartridge World	3	Church Street	A1
Clippers salon	4	Church Street	A1
The Bromsgrove Cobbler	6	Church Street	A1
Aubrey Bernard salon	7	Church Street	A1
K Bassam Jewellery	8	Church Street	A1
Country Kasuals	11	Church Street	A1
M & M's hair Shack	11	Church Street	A1
The Korner Kitchen	12	Church Street	A1
School Days	13 to 15	Church Street	A1
Bromsgrove Advertiser	5	High Street	A1
Urban Angel	10	High Street	A1
Primrose Hospice	12	High Street	A1
Holland & Barrett	15	High Street	A1
Poundland	37 to 41	High Street	A1
UK Barber Shop	42	High Street	A1
Bromsgrove Standard	44	High Street	A1
Eyedeals Eye Care	46	High Street	A1
British Heart Foundation	50	High Street	A1
Hallmark	51	High Street	A1
Leigh Jones Butchers & Delicatessen	53	High Street	A1
W H Smith	54 to 56	High Street	A1
Smash n Grab	55	High Street	A1
Twenty One	58 to 60	High Street	A1
F Hinds	59	High Street	A1
Max Spielman	63	High Street	A1
Boots Optician	64	High Street	A1
Lesley Ashworth Accessories	65	High Street	A1
Oswald Bailey	67	High Street	A1
Phones 4 U	69	High Street	A1
Clares	71	High Street	A1
Blunts	75	High Street	A1
Betel International Furniture	76	High Street	A1
Card Factory	77 to 79	High Street	A1
Boots	78	High Street	A1

Carphone Warehouse	80	High Street	A1
Edinburgh Woollen Mill	81 to 83	High Street	A1
Elements Fashion Jewellery	85	High Street	A1
French Connection Baguette	87	High Street	A1
Clinton Cards	88 to 90	High Street	A1
Nails 4 U	89b	High Street	A1
Thomson	91	High Street	A1
Bromsgrove Menswear	91a	High Street	A1
Thomas Cook	92	High Street	A1
The Works	94	High Street	A1
Ryman Stationery	95	High Street	A1
Martin's local shop	96	High Street	A1
New Look	97	High Street	A1
Card Party	99	High Street	A1
Oxfam book shop	101	High Street	A1
Greggs	102 to 104	High Street	A1
Chapmans opticians	103	High Street	A1
Savers	105 to 107	High Street	A1
The Peer Group	106	High Street	A1
Madaboutsweets	108	High Street	A1
Acorns	109	High Street	A1
Hoyti-Toyti	110	High Street	A1
Sporting Barbers	112a	High Street	A1
Timpsons	112a	High Street	A1
Dorothy Perkins (Burtons on first floor)	113	High Street	A1
EE	114	High Street	A1
M & Co	115	High Street	A1
Post Office	117 to 121	High Street	A1
Foto Factory	123	High Street	A1
PDSA	125	High Street	A1
The Blue Cross	127	High Street	A1
Specsavers	131	High Street	A1
Subway	131a	High Street	A1
Imperial Cancer Research	132 to 136	High Street	A1
Chapters Hair	133	High Street	A1
Mothercare	138	High Street	A1
Sports Direct	138 - 140	High Street	A1
Argos	140	High Street	A1
Sweetz	140	High Street	A1
Peacocks	120,120a	High Street	A1
YMCA shop	27 to 29	High Street	A1
Salvation Army	33,35	High Street	A1
Bodycare	43 to 45	High Street	A1

Midlands Co-op Travel	2	Mill Lane	A1
Fresh Flowers	4	Mill Lane	A1
Thompsons	6	Mill Lane	A1
Extra Care	8	Mill Lane	A1
Johns Fruit & Veg	10	Mill Lane	A1
Iceland	12	Mill Lane	A1
Spains	2	New Road	A1
GB hairdressing	4	New Road	A1
Alberto Policarpo Hair Salon	5	New Road	A1
Cupitts	16	The Strand	A1
Michael Stewart Photography	16	The Strand	A1
Hair Art	16	The Strand	A1
Arty Facts Studio	18	The Strand	A1
Midland Water Life	20 to 24	The Strand	A1
Vintage Cottage	2 to 4	The Strand, The Strand Centre	A1
Strand Nails	2 to 4	The Strand, The Strand Centre	A1
Phone Locker	2 to 4	The Strand, The Strand Centre	A1
Bromsgrove Computer Centre	2 to 4	The Strand, The Strand Centre	A1
Babies Town	2 to 4	The Strand, The Strand Centre	A1
Block 98	4	Worcester Road	A1
KR Solar	6	Worcester Road	A1
Loopy Ladies Craft	8	Worcester Road	A1
K K Mart	16	Worcester Road	A1
KSH O Carpet & Flooring	18	Worcester Road	A1
CV Firminger & Co financial advisor	6a	Church Street	A2
Cheque Centre	9	Church Street	A2
A Plan Insurance	6 to 8	High Street	A2
Betfred	17 to 21	High Street	A2
Allan Morris	18	High Street	A2
Dixons Countrywide	31	High Street	A2
HSBC	47	High Street	A2
West Bromwich Building Society	48	High Street	A2
Nationwide	52	High Street	A2
Robert Oulsnam & Co	61	High Street	A2
Ladbrokes	82	High Street	A2
Santander	93	High Street	A2
Lloyds TSB	112	High Street	A2
The Money Shop	116	High Street	A2
Barclays	118	High Street	A2
Natwest Bank	124	High Street	A2
Premiere People	129	High Street	A2
Halifax	122,122a	High Street	A2

William Hill	140	High Street	A2
MFC solicitors	1	High Street (& 2 to 6 Market Place)	A2
Your Move	1 to 3	New Road	A2
Andrew Grant	5	New Road	A2
Hansons estate agent	6	New Road	A2
Arden Estate Agents	2 to 4	The Strand, The Strand Centre	A2
Ladbrokes	3	Worcester Road	A2
Lemon tree café	1	Chapel Street	A3
Plaza Coffee	5	Chapel Street	A3
The Art Café	9	Chapel Street	A3
Shimla Peppers	1	George Street	A3
Indian Spice	7	High Street	A3
Pizza Express	25	High Street	A3
The Regency	40	High Street	A3
Pizza Hut	14 to 16	High Street	A3
Prezzo	22 to 24	High Street	A3
Coffee 2	74	High Street	A3
Costa	84 to 86	High Street	A3
Courtyard Café & Bistro	89a	High Street	A3
Café Brazil	2 to 4	The Strand, The Strand Centre	A3
Bujon Indian	1	Worcester Road	A3
Maekong Thai	12	Worcester Road	A3
Golden Cross Hotel Wetherspoon	20	High Street	A4
The Red Lion	73	High Street	A4
The Grape Vine	11 to 13	High Street	A4
The Slug and Lettuce	128 to 130	High Street	A4
Dominos	133a	High Street	A5
Market Place Fish Bar	26	Market Street	A5
Wok Kitchen	10	Church Street	A5
Ocean Fish Bar	12	The Strand	A5
Careforce Ltd	12a Holland House	High Street	B1
Bromsgrove Printing Co	14	Worcester Road	B2
Bromsgrove Community Hall	14	The Strand	D1
Touch of Beauty	6 and 10	The Strand	SG
Shipleys	111	High Street	SG
Judith Hitchin Vacant	26,26a	The Strand	Vacant
Vacant	2 to 4	High Street	Vacant
Vacant	9	High Street	Vacant
Vacant	23	High Street	Vacant
Vacant	49	High Street	Vacant

Blockbuster (Vacant)	2	Worcester Road	Vacant
Vacant	62	High Street	Vacant
Vacant	87a	High Street	Vacant
Vacant	The Coach House	High Street	Vacant
Happy Feet (vacant)	2 to 4	The Strand, The Strand Centre	Vacant
Vacant (Planet Tattoo)	2 to 4	The Strand, The Strand Centre	Vacant
Vacant	2 to 4	The Strand, The Strand Centre	Vacant
Vacant	2 to 4	The Strand, The Strand Centre	Vacant
Vacant	2 to 4	The Strand, The Strand Centre	Vacant
Vacant	2 to 4	The Strand, The Strand Centre	Vacant
Vacant	3	High Street	Vacant
Vacant	98 to 100	High Street	Vacant
Greggs (Vacant)	112b	High Street	Vacant
Eyedeals Eye Care (vacant)	38	High Street	Vacant
Waterstones (vacant)	66 to 68	High Street	Vacant

Secondary shopping area			
Business Name	No	Street	Class
Knights Chemist	36	Birmingham Road	A1
YMCA Furniture	54a	Birmingham Road	A1
Co-Op	54b	Birmingham Road	A1
Kash Kwik	17	The Strand	A1
Strand Barbers	19	The Strand	A1
Cake Magic	21	The Strand	A1
Ann Marie	17	Worcester Road	A1
Hairs & Graces	19	Worcester Road	A1
Manhattan nails & spa	40	Worcester Road	A1
Capillago	41-43	Worcester Road	A1
The sandwich lady and sons	42	Worcester Road	A1
Eileen Bicknell Interiors	48	Worcester Road	A1
The Sugarcraft Emporium	56	Worcester Road	A1
Snipz	59	Worcester Road	A1
Parkes Hair & Beauty	62	Worcester Road	A1
Instruments for You	64	Worcester Road	A1
Denise Lesley salon	78	Worcester Road	A1
Bromsgrove Carpets & bedding warehouse	28 to 32	Worcester Road	A1
Zig-Zag Hair	42a	Worcester Road	A1
X-Change	13 to 15	Worcester Road	A1
Gadget Clinic	51	Worcester Road	A1
Worcester Road News	52 to 54	Worcester Road	A1
Oakley Independent Mortgage Advisors	48	Birmingham Road	A2

Citizens Advice Bureau	50 to 52	Birmingham Road	A2
Ormerod Rutter accountants	25	The Strand	A2
Mitre House financial planning	27	The Strand	A2
Thomas Holton Solicitors office	The Strand House	The Strand	A2
Simply Lets	11	Worcester Road	A2
Pinfields Accountants	57 & 61	Worcester Road	A2
On the Rocks	44	Worcester Road	A3
Coffee Ole	50	Worcester Road	A3
Spice Valley Balti	74	Worcester Road	A3
The Rovers Cafe	34	Birmingham Road	A3
Queen's Head	1	The Strand	A4
Dog & Pheasant pub	24 to 26	Worcester Road	A4
Ye Olde Black Cross	70 to 72	Worcester Road	A4
Papa Johns	32	Birmingham Road	A5
China Wok	30	Birmingham Road	A5
Wing Lee	3,3a,3c	Hanover Street	A5
DJ's Chips	Rear 24 to 26	Worcester Road	A5
Antonio's pizza	34	Worcester Road	A5
Anarkali Indian Takeaway	55	Worcester Road	A5
Charlies Kebabs	58	Worcester Road	A5
New Orient	60	Worcester Road	A5
Darr's fish & Chips	66-68	Worcester Road	A5
Ruby	76	Worcester Road	A5
Gough Allen Stanley Marketing	5	Worcester Road	B1
Commercial Credit Service Group	7	Worcester Road	B1
Bromsgrove Conservative Association	37	Worcester Road	B1
BYHF The Basement Project	1	Hanover Street	B1
School of Music	10	Worcester Road	D1
Adrian Kriss & Associates	47 to 49	Worcester Road	D1
Davenal House Surgery	28	Birmingham Road	D1
Texaco petrol station and auxillary shop	38 to 46	Birmingham Road	SG
Hi Q Autos	3a,3c	Hanover Street	SG
Neales Garage - Hyundai	2 to 12	Station Street	SG
The Maxx (Tattooists & Body Peircing)	36	Worcester Road	SG
Love 2 Love	39	Worcester Road	SG
Vacant	54	Birmingham Road	Vacant
Drive Safe (Vacant)	21	Worcester Road	Vacant
Bombay Mix (Vacant)	33-35	Worcester Road	Vacant
The cork screw wine (Vacant)	38	Worcester Road	Vacant

The Sweet Shop (Vacant)	45	Worcester Road	Vacant
Serendipity Flowers (Vacant)	46	Worcester Road	Vacant
Vacant	53	Worcester Road	Vacant

Other areas			
Business Name	No	Street	Class
Benesseie hair & beauty	68	Birmingham Road	A1
Geeves dry cleaner	104	Birmingham Road	A1
Costello	106	Birmingham Road	A1
The Wine Cabin	108	Birmingham Road	A1
Halfords	114	Birmingham Road	A1
Speeds	70,72,72a	Birmingham Road	A1
Townsend Textiles	74 to 76	Birmingham Road	A1
Wills Wigs hairdresser	49	Birmingham Road	A1
Hamptons Optical Ltd.	9	Crown Close	A1
BSS Office Supplies	12	Hanover Street	A1
Knights Pharmacy	18	Market Street	A1
Asda Stores Ltd.	21	Market Street	A1
Just for pets	20 to 22	Market Street	A1
Harveys	The Well House	Market Street	A1
George Davis salon	14	St John Street	A1
Bromsgrove Fireplaces	8	Stourbridge Road	A1
Jame Giles & Sons Funerals	22a	Stourbridge Road	A1
Lloyds Pharmacy	BHI Parkside	Stourbridge Road	A1
Eyecare Opticians	BHI Parkside	Stourbridge Road	A1
Handy Print	118	Worcester Road	A1
Bromsgrove Domestic	124	Worcester Road	A1
Broadstreet DIY	128	Worcester Road	A1
Jewsons DIY	106 to 116a	Worcester Road	A1
Phoenix Carpet & Bed Sales	94 to 96	Worcester Road	A1
Britannia House Hair & Beauty	165	Worcester Road	A1
Hollies Solicitor	60	Birmingham Road	A2
G R Brickstock & Assocaites - accountant	10	Hanover Street	A2
Fisher German Estate Agent	8	New Road	A2
Charles Howell Estate Agent	13	New Road	A2
JP Dillon	13	New Road	A2
Kenneth Morris Accountants	9 to 11	New Road	A2
Holt & Sellars - Solicitors	10	St John Street	A2
A Victor Powell	12	St John Street	A2
Robert Fearon & Co	18	St John Street	A2

S Haskey Architects	20	St John Street	A2
Harrison Priddy & Co - accountants	22	St John Street	A2
Holt & Sellars - Solicitors	12a	St John Street	A2
Mint Lounge	31 to 33	Birmingham Road	A3
Tandoori	11	Crown Close	A3
Big Daves Café	141 to 143	Worcester Road	A3
Thai Lotus	147a	Worcester Road	A3
Hop Pole	78	Birmingham Road	A4
The Crabmill Inn	116 to 122	Birmingham Road	A4
The Turk's Head	147	Worcester Road	A4
Ideal	110	Birmingham Road	A5
Oriental Royal	112	Birmingham Road	A5
Popup Software	49,49a	Birmingham Road (4 & 5 Holt Studios)	B1
Independent	49,49a	Birmingham Road (1, 2, 3, 7 & 8 Holt Studios)	B1
Independent	49,49a	Birmingham Road (1, 2, 3, 7 & 8 Holt Studios)	B1
Pale Purple	49,49a	Birmingham Road (1, 2, 3, 7 & 8 Holt Studios)	B1
Office	14	Hanover Street	B1
Mark England Garden Design	11	Kidderminster Road	B1
Office	Shire House	Paradise Row	B1
Register Office		School Drive	B1
J Turner Associates	20	St John Street	B1
Bromsgrove Allergy & Nutrition	18	St John Street	B1
Worcestershire County Council		Windsor Street	B1
Vinci Construction	86	Worcester Road	B1
Office	122	Worcester Road	B1
Kay-Bee engineering	Unit 4	Station Street	B8
Elisa Smile Centre	66	Birmingham Road	D1
Clent Hills Vetinary Group	5	Kidderminster Road	D1
St Johns Counselling	9	Kidderminster Road	D1
All saints church		Burcot Lane	D1
Nursery		Shenstone Close	D1
St John's Street Surgery	BHI Parkside	Stourbridge Road	D1
Churchfields Surgery	BHI Parkside	Stourbridge Road	D1
Parkside Dental Practice	BHI Parkside	Stourbridge Road	D1
Catherine Adam's Physiotherapy	BHI Parkside	Stourbridge Road	D1
Castle Nursery	BHI Parkside	Stourbridge Road	D1

The Dolphin Centre		School Drive	D1
North Bromsgrove High School		School Drive	D1
Library		Windsor Street	D1
Bromsgrove Football Club		Birmingham Road	D2
The Artrix		School Drive	D2
Well Fit	Unit 8	Station Street	D2
Altered Images fitness	80	Worcester Road	D2
Imagination Street	29	Birmingham Road	D2
All Saints Garage (Vauxhall)	125 to 137	Birmingham Road	SG
Bromsgrove car & commercial sales	container office by 31	Birmingham Road	SG
Tan & Tone Centre	Rear of 43	High Street	SG
Bromsgrove Dog Beauticians	1	Little Lane	SG
Neales Garage	Garage	Station Street	SG
KW Autos	Unit 6	Station Street	SG
Parkside Motors	8	Stourbridge Road	SG
Tyre Centre	2	Stratford Road	SG
Meridian health & beauty clinic	2	Windsor Street	SG
Age Concern	51	Windsor Street	SG
Tyrecare (Midlands) Ltd.	NN	Windsor Street	SG
Fire Station		Windsor Street	SG
Police		Windsor Street	SG
Kwik-fit	126	Worcester Road	SG
Vacant	26	Birmingham Road	Vacant
Vacant	29	Birmingham Road	Vacant
Vacant	49,49a	Birmingham Road (4 & 5 Holt Studios)	Vacant
Vacant land	88 to 92	Birmingham Road	Vacant
The Wishing Well (Vacant)	16	St John Street	Vacant
Vacant	7	Kidderminster Road	Vacant
Vacant (Dragon Paradise)	2 to 4	Recreation Road	Vacant
Vacant	The Clinic	Recreation Road	Vacant
Vacant	Drill Hall	Recreation Road / Market Street	Vacant
Vacant	Basby House	Recreation Road	Vacant
Parkside Middle School	1,1a	Stourbridge Road	Vacant
Vacant	14 to 22	Stourbridge Road	Vacant
Vacant	5	Windsor Street	Vacant

Appendix C: Goad Category Report (2012)



Goad Category Report

Bromsgrove

Survey Date: 18/09/2012



GETTING THE MOST FROM YOUR GOAD CATEGORY REPORT

Each shopping centre has its own unique mix of multiple outlets, independent shops, convenience and comparison stores, food outlets and vacant premises.

Understanding the retail composition of a centre and its effect on local consumers is crucial to the success of any business. By studying the information in the report, you will be able to examine site quality, evaluate threats opportunities, and assess the vitality and viability of the centre. However, you will only achieve this if you are aware of the various implications of the data that you see. This guide is designed to help you interpret the information you see on the Goad Category Report.

1. The Local Area

When evaluating the quality of a site, it is often beneficial to compare it with other local shopping centres. Category Reports are available for the majority of retail centre that we map.

2. The Indexing System

A simple indexing system appears throughout the report. This illustrates the difference between a percentage figure for the centre and the UK average. An index of 100 represents an exact match, anything less than 100 indicates a below average count for the centre, and a figure over 100 represents an above average count.

For example, if restaurants accounted for 10% of a centre's outlets and the UK average was also 10%, the index would be 100. If however, the UK average was 8%, the index would be 125.

The index is an effective gap analysis tool and can be used to identify areas that are under and over represented within a centre. A retail category that is heavily under represented could indicate poor local demand. On the other hand, it could show that there is an untapped market waiting to be serviced. Either way, it provides a strong indication that the site will need to be examined further.

3. Floor Space

The floor space figures shown on the report are derived from the relevant Goad Plan, but only show the footprint floorspace, and the site area without the building lines. They should not therefore be read as a definitive report of floor space, but do provide a useful means of

comparison between centres, as all outlets are measured in a consistent manner.

4. Vacant Outlets

Comparing the number of vacant outlets with the GB average provides a useful insight into the current economic status of a centre. For example, a high index generally represents under-development or decay, while a low index shows a strong retail presence.

5. Multiple Outlets/Major Retailers

A multiple retailer is defined as being part of a network of nine or more outlets. The presence of multiple outlets can greatly enhance the appeal of a centre to local consumers. The strong branding and comprehensive product mix of retailers such as Marks & Spencer, Boots and HMV are often sufficient in itself to attract consumers to a centre. 30 national multiples have been identified as Major Retailers, (i.e. those retailers most likely to improve the consumer appeal of a centre).

The presence of multiple outlets and major retailers can have a significant impact on neighbouring outlets. While other retailers will undoubtedly benefit from increased pedestrian traffic, (and therefore increased sales opportunities), multiples provide fierce competition for rivals in their retail categories.

Also available from Experian

The Goad Centre Report

This defines the retail extent and composition of a centre, showing the number of premises in over 27 retail categories and detailing the space allocation across each of them. A comparison of these figures with the national average illustrates under or over representation by category, allowing you to assess the degree of competition or opportunity within the centre.

The Goad Distribution Report

Goad Distribution Reports provides a top-level analysis of the total retail mix and composition of a centre. It shows the number of premises in 16 categories and details the space allocation across each of them.

Retail Planner

Retail Planner is a service for retail planners, property consultants and retailers, providing comprehensive, up-to-date information for retail planning related decisions. Specifically we provide data for three different types of expenditure: Comparison, Convenience and Leisure. Each category is broken down into the European standard COICOP (Classification of Individual Consumption by Purpose) classification. Data is available at output area and postal sector levels. We can also provide data for predefined areas such as Local Authority District Boundaries.

Goad Paper Plans

These provide a bird's eye view of over 1,250 UK retail centres. The name, retail category, floor space and exact location of all outlets and vacant premises is recorded and mapped. Key location factors such as pedestrian zones, road crossings, bus stops and car parks are also featured. There are also over 800 retail park plans available

Goad Digital Plans

Digital plans are available online through our Goad Network system. This enables the user to View, Interrogate Edit & Print plans to their own requirements. For a demonstration logon to <http://www.goadnetwork.co.uk/demologin.asp>

Tailored Plans and Extracts

We are able to provide tailored plans and extracts which highlight the information most relevant to your enquiry.

The Retail Address Database

An extensive database covering the addresses of 360,000 retail outlets across the UK, this is a highly effective tool for site evaluation and competitor analysis.

For further details on these products or if you have any queries regarding your Goad Category Report, please contact Experian on: Tel: 0845 601 6011

Fax: 0115 968 5003 E-mail: goad.sales@uk.experian.com

Nearest Centres and Major Retailers

Bromsgrove



Nearest Location	Distance KM
Rubery	7.08
Redditch	8.69
Droitwich	9.55
Birmingham - Northfield	10.83
Hagley	10.99

Major Retailers Present			
Department Stores			
BHS	0	Burton	1
Debenhams	0	Dorothy Perkins	1
House of Fraser	0	H & M	0
John Lewis	0	New Look	1
Marks & Spencer	0	Next	0
		Primark	0
Mixed Goods Retailers			
Argos	1	River Island	0
Boots the Chemist	1	Topman	0
T K Maxx	0	Topshop	0
W H Smith	1		
Wilkinson	0	Other Retailers	
		Carphone Warehouse	1
Supermarkets			
Sainsbury's	0	Clarks	0
Tesco	0	Clintons	1
Waitrose	0	H M V	0
		O2	0
		Superdrug	0
		Phones 4 U	1
		Vodafone	0
		Waterstones	0

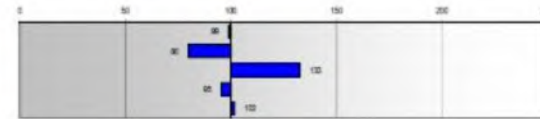
Multiple Counts & Floorspace by Sector

Counts	Outlets	Area %	Base %	Index
Comparison	39	42.66	43.29	99
Convenience	8	8.79	10.99	80
Retail Service	12	13.19	9.94	133
Leisure Services	17	18.68	19.56	95
Financial & Business Services	15	16.48	16.21	102

Total Multiple Outlets 91

Floorspace Sq Ft	Outlets	Area %	Base %	Index
Comparison	115,200	38.27	47.97	80
Convenience	86,300	28.67	22.41	128
Retail Service	21,500	7.14	5.01	143
Leisure Services	42,900	14.25	15.58	91
Financial & Business Services	35,100	11.66	9.03	129

Total Multiple Floorspace 301,000

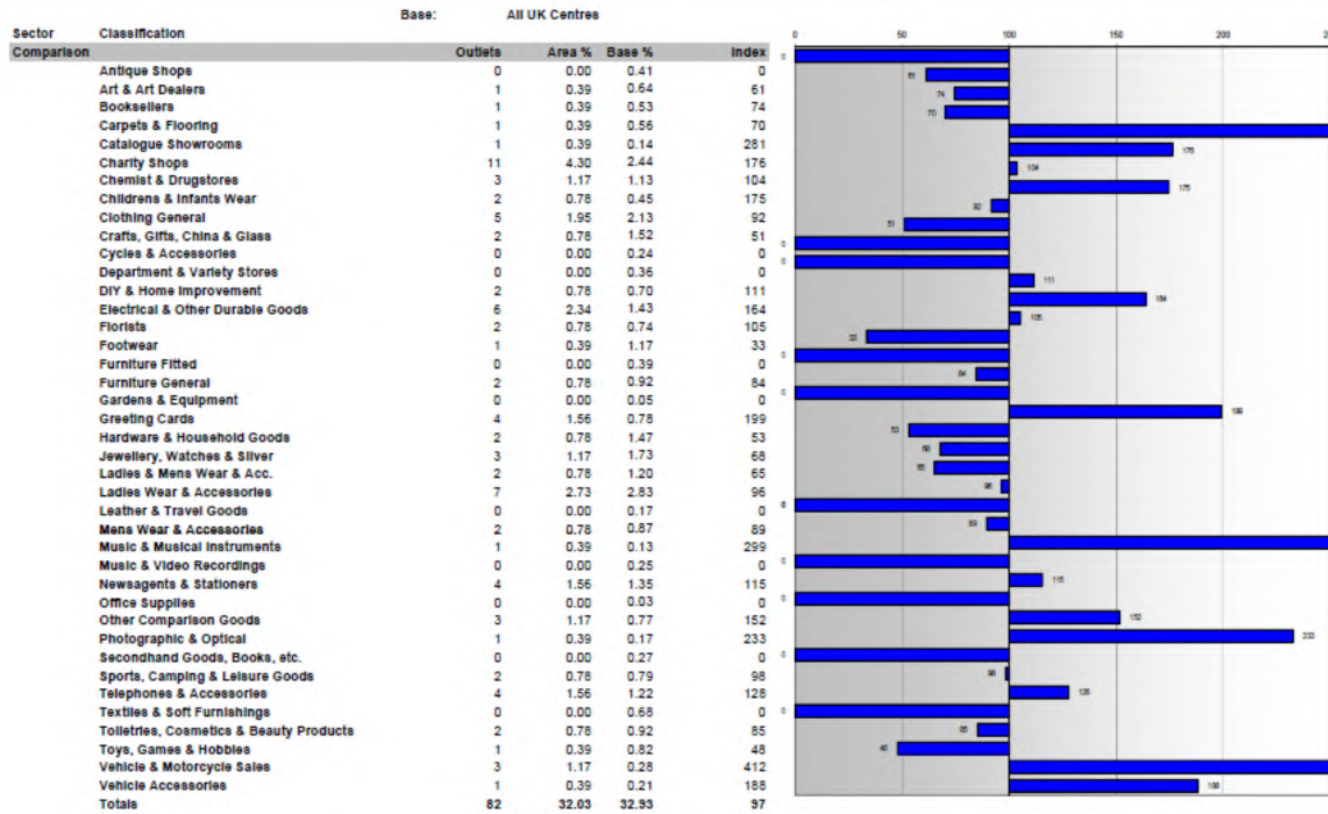


Outlet Counts

Centre:

Bromsgrove

Survey Date: 18/09/2012



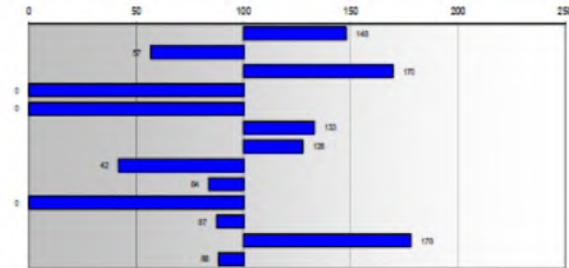
Outlet Counts

Centre:

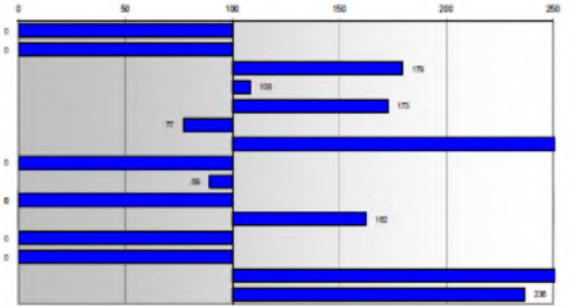
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Survey Date: 18/09/2012

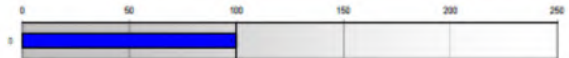
Convenience	Outlets	Area %	Base %	Index
Bakers & Confectioners	7	2.73	1.85	148
Butchers	1	0.39	0.69	57
CTN	1	0.39	0.23	170
Convenience Stores	0	0.00	1.26	0
Fishmongers	0	0.00	0.12	0
Frozen Foods	1	0.39	0.29	133
Greengrocers	1	0.39	0.31	128
Grocers & Delicatessens	1	0.39	0.94	42
Health Foods	1	0.39	0.47	84
Markets	0	0.00	0.11	0
Off Licences	1	0.39	0.45	87
Shoe Repairs Etc	2	0.78	0.44	178
Supermarkets	2	0.78	0.88	88
Total Convenience	18	7.63	8.03	88



Retail Service	Outlets	Area %	Base %	Index
Clothing & Fancy Dress Hire	0	0.00	0.08	0
Dry Cleaners & Laundrettes	0	0.00	0.83	0
Filling Stations	1	0.39	0.22	179
Health & Beauty	22	8.59	7.95	108
Opticians	6	2.34	1.36	173
Other Retail Services	1	0.39	0.51	77
Photo Processing	1	0.39	0.15	261
Photo Studio	0	0.00	0.18	0
Post Offices	1	0.39	0.44	89
Repairs, Alterations & Restoration	0	0.00	0.22	0
Travel Agents	4	1.56	0.96	162
TV, Cable & Video Rental	0	0.00	0.02	0
Vehicle Rental	0	0.00	0.06	0
Vehicle Repairs & Services	4	1.56	0.50	314
Video Tape Rental	1	0.39	0.17	236
Totals	41	16.02	13.63	118



Other Retail	Outlets	Area %	Base %	Index
Other Retail Outlets	0	0.00	0.16	0



Outlet Counts

Centre:

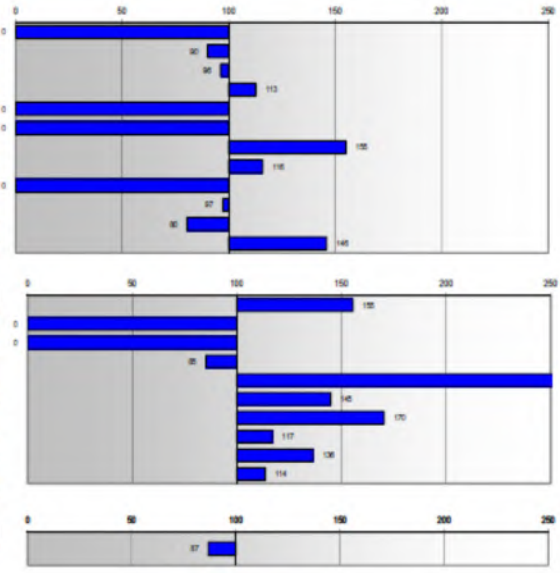
Bromsgrove

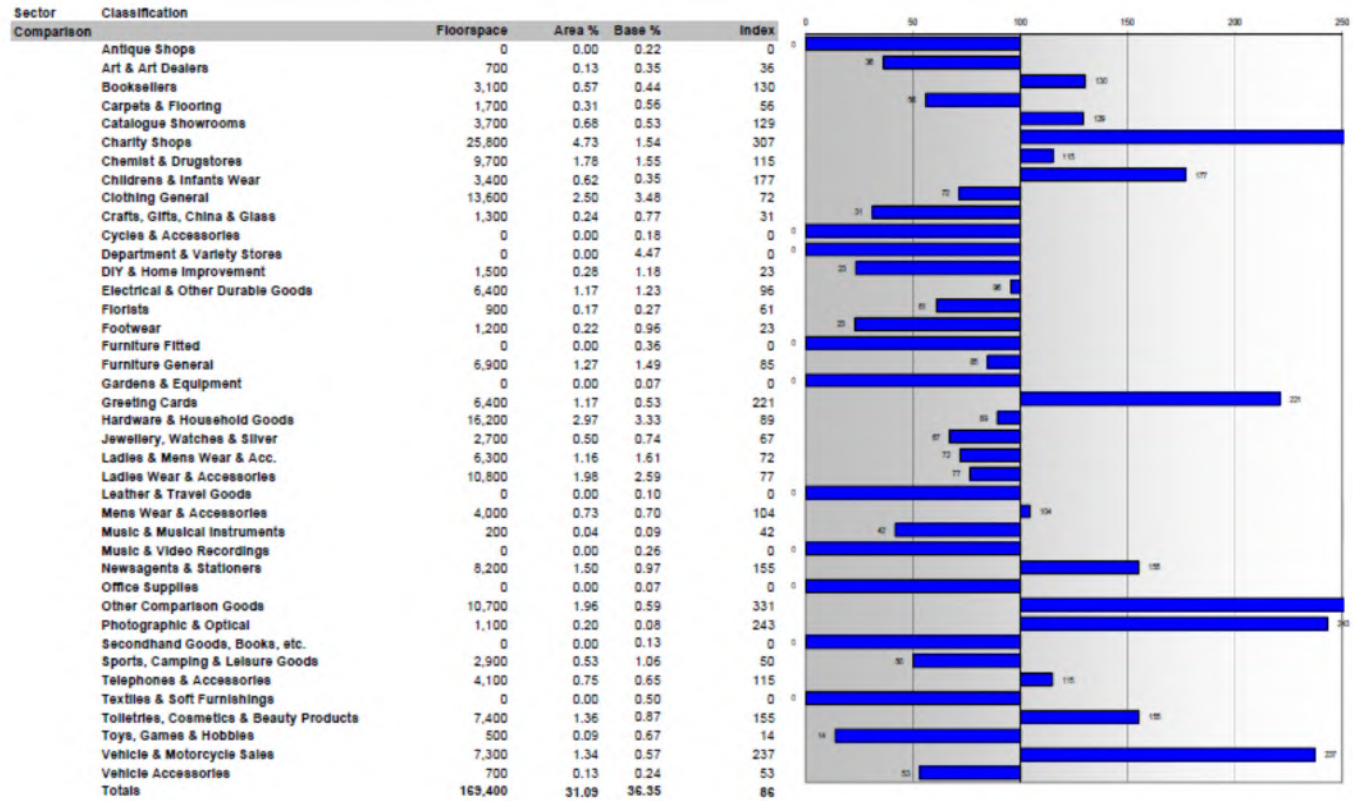
Survey Date: 18/09/2012

Leisure Services	Outlets	Area %	Base %	Index
Bars & Wine Bars	0	0.00	1.43	0
Bingo & Amusements	1	0.39	0.43	90
Cafes	10	3.91	4.06	96
Casinos & Betting Offices	4	1.56	1.39	113
Cinemas, Theatres & Concert Halls	0	0.00	0.25	0
Clubs	0	0.00	0.68	0
Disco, Dance & Nightclubs	1	0.39	0.25	155
Fast Food & Take Away	16	6.25	5.40	116
Hotels & Guest Houses	0	0.00	0.63	0
Public Houses	7	2.73	2.81	97
Restaurants	9	3.52	4.37	80
Sports & Leisure Facilities	1	0.39	0.27	146
Totals	49	19.14	21.96	87

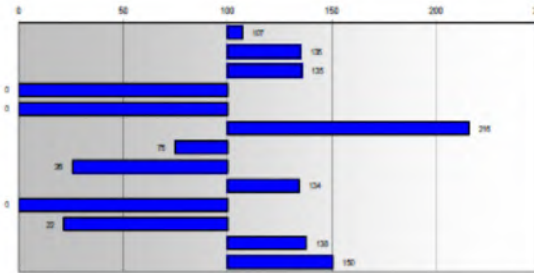
Financial & Business Services	Outlets	Area %	Base %	Index
Building Societies	2	0.78	0.50	155
Building Supplies & Services	0	0.00	0.52	0
Business Goods & Services	0	0.00	0.03	0
Employment & Careers	1	0.39	0.46	85
Financial Services	9	3.52	1.39	253
Legal Services	4	1.56	1.08	145
Other Business Services	2	0.78	0.46	170
Printing & Copying	1	0.39	0.33	117
Property Services	12	4.69	3.44	136
Retail Banks	8	3.13	2.75	114
Totals	39	15.23	10.96	139

Vacant Outlets	Outlets	Area %	Base %	Index
Vacant Retail & Service Outlets	27	10.55	12.16	87
Total Number of Outlets	256			

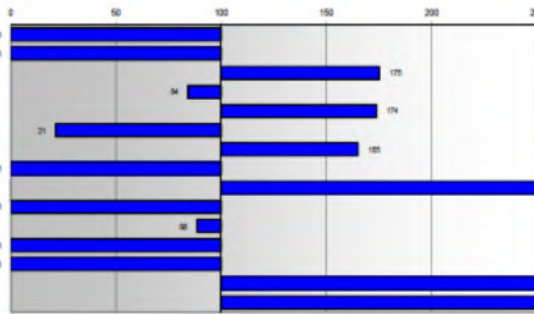




Convenience	Floorspace	Area %	Base %	Index
Bakers & Confectioners	5,100	0.94	0.87	107
Butchers	2,500	0.46	0.34	135
CTN	900	0.17	0.12	135
Convenience Stores	0	0.00	1.25	0
Flashmongers	0	0.00	0.05	0
Frozen Foods	9,200	1.69	0.78	216
Greengrocers	600	0.11	0.15	75
Grocers & Delicatessens	700	0.13	0.50	26
Health Foods	1,900	0.35	0.26	134
Markets	0	0.00	0.88	0
Off Licences	300	0.06	0.26	22
Shoe Repairs Etc	900	0.17	0.12	138
Supermarkets	72,500	13.31	8.85	150
Total Convenience	94,600	17.36	14.43	120



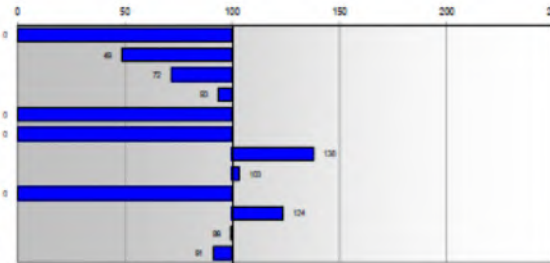
Retail Service	Floorspace	Area %	Base %	Index
Clothing & Fancy Dress Hire	0	0.00	0.04	0
Dry Cleaners & Laundrettes	0	0.00	0.35	0
Filling Stations	1,100	0.20	0.12	175
Health & Beauty	16,300	2.99	3.55	84
Opticians	7,400	1.36	0.78	174
Other Retail Services	400	0.07	0.34	21
Photo Processing	500	0.09	0.06	165
Photo Studio	0	0.00	0.08	0
Post Offices	8,200	1.50	0.48	313
Repairs, Alterations & Restoration	0	0.00	0.08	0
Travel Agents	2,500	0.46	0.52	88
TV, Cable & Video Rental	0	0.00	0.00	0
Vehicle Rental	0	0.00	0.05	0
Vehicle Repairs & Services	9,600	1.76	0.64	275
Video Tape Rental	3,000	0.55	0.16	353
Totals	49,000	8.99	7.25	124



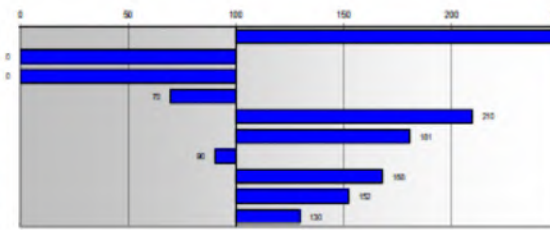
Other Retail	Floorspace	Area %	Base %	Index
Other Retail Outlets	0	0.00	0.11	0



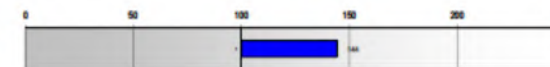
Lelure Services	Floorspace	Area %	Base %	Index
Bars & Wine Bars	0	0.00	1.80	0
Bingo & Amusements	2,400	0.44	0.91	49
Cafes	8,200	1.50	2.10	72
Casinos & Betting Offices	5,400	0.99	1.06	93
Cinemas, Theatres & Concert Halls	0	0.00	1.64	0
Clubs	0	0.00	1.16	0
Disco, Dance & Nightclubs	4,100	0.75	0.55	138
Fast Food & Take Away	14,500	2.66	2.58	103
Hotels & Guest Houses	0	0.00	1.90	0
Public Houses	25,100	4.61	3.73	124
Restaurants	20,500	3.76	3.79	99
Sports & Lelure Facilities	7,700	1.41	1.55	91
Totals	87,900	16.13	22.76	71



Financial & Business Services	Floorspace	Area %	Base %	Index
Building Societies	5,300	0.97	0.39	252
Building Supplies & Services	0	0.00	0.47	0
Business Goods & Services	0	0.00	0.01	0
Employment & Careers	1,100	0.20	0.29	70
Financial Services	8,900	1.63	0.78	210
Legal Services	7,600	1.39	0.77	181
Other Business Services	2,500	0.46	0.51	90
Printing & Copying	1,800	0.33	0.20	168
Property Services	14,800	2.72	1.78	152
Retail Banks	22,100	4.06	3.13	130
Totals	64,100	11.76	8.34	141



Vacant Outlets	Floorspace	Area %	Base %	Index
Vacant Retail & Service Outlets	79,900	14.66	10.16	144
Total Floorspace	544,900			



TERMS AND CONDITIONS

1. DEFINITIONS

"This agreement" means the terms and conditions hereunder and the correspondence between the parties attached hereto.
"Experian" means Experian Group Limited.
"the Client" means the person, firm or limited company to whom the Services are to be provided.
"the Information" means any information (in whatever form) provided to the Client by Experian in connection with the Services.
"the Media" means the records, tapes or other materials and documents by which the information is communicated to the Client.
"the Services" means the services to be provided by Experian to the Client more particularly described in the correspondence between the parties attached hereto.

2. CONTRACT TERMS

Subject to Clause 14 hereunder this Agreement shall be on the terms and conditions set out below to the exclusion of any other terms and conditions whether or not the same are endorsed upon, delivered with or referred to in any document delivered or sent by the Client to Experian.

3. PAYMENT OF CHARGES

3.1 The charges for the Services ("the Charges") shall be specified by Experian to the Client.
3.2 The Client shall pay the Charges within 28 days of the date of Experian's invoice thereof.
3.3 Interest at an annual rate of 5% above Barclays Bank plc's base rate from time to time shall accrue daily and be calculated on a daily basis on any sum overdue from the date of invoice until payment in full of the Charges.
3.4 Unless expressly stated otherwise the Charges shall be exclusive of VAT (or any other duty chargeable in respect thereof) (which for the avoidance of doubt shall be payable by the Client in accordance with the terms and conditions hereof).

4. PROVISION OF THE SERVICES

4.1 Experian shall use all reasonable endeavours to ensure that the information is accurate in all material respects.
4.2 Save as provided in sub-clause 4.1 above or otherwise expressly provided in this Agreement or to the extent that it is unlawful for any such representations and warranties to be excluded Experian makes no representations or warranties whether express or implied (by statute or otherwise) in connection with the Services or use thereof by the Client or otherwise in connection with this Agreement.
4.3 The parties hereto agree that the time for the performance of Experian's obligations in connection with the Services shall not be of the essence in this Agreement.

5. LIMITATION OF LIABILITY

Notwithstanding anything to the contrary contained in this Agreement:
5.1 Experian shall not be liable (whether in contract or in negligence (other than the liability in respect of death or personal injury arising out of the negligence of Experian (its servants or agents) or other tort or otherwise) for any indirect or consequential loss of any kind whatsoever (including without limitation loss of profit or loss of business) suffered by the Client in connection with the Services.
5.2 Without prejudice to the provisions of sub-clause 4.1 above Experian's maximum aggregate liability hereunder (other than liability in respect of death or personal injury arising out of the negligence of Experian (its servants or agents) whether for breach of this Agreement or otherwise and whether or not arising from the negligence of Experian or any other person involved directly or indirectly in the provision of the Services) shall not exceed an amount equal to the Charges (exclusive of VAT) payable to Experian hereunder.

6. COPYRIGHT

Property and the copyright (and all other intellectual property rights) in the Media and the Information (other than any information which has passed to Experian by the Client in connection with the Services or which has been obtained from any third party by Experian) which copyright and all other intellectual property rights as appropriate shall remain vested in such third party) shall at all times remain vested in Experian.

7. CONFIDENTIALITY

7.1 The Client undertakes that it shall use the Information solely for the purpose of its own business and shall not (without the prior written consent of Experian) copy, reproduce, publish or transmit any part of the Information in any manner whatsoever and the media shall be returned to Experian upon demand.
7.2 The Client undertakes with Experian that the Client shall permit access to the Information only to those of its authorized officers or employees who need to know or use the Information and that the Client shall procure that its offices and employees shall maintain in strictest confidence and not divulge, communicate or permit access to any third party any confidential information relating to Experian.
7.3 For the purpose of sub-clause 7.2 hereof the expression "confidential information" shall mean (as the context may require)
7.3.1 the Information; and/or
7.3.2 any information concerning Experian's trade secrets or business dealings, transactions or affairs which may come to the notice of the Client; and/or
7.3.3 any information and/or know how relating to the methods or techniques used by Experian in devising and developing the Services and any tapes, documents or other materials comprising any part of such information and/or know how made available by Experian hereunder.
7.4 The provisions of sub-clause 7.2 hereof shall not apply to any confidential information to the extent that:
7.4.1 the Client is required to divulge the same by a Court tribunal or government authority with competent jurisdiction
7.4.2 it has already come within the public domain
7.4.3 it was already known to the Client prior to the date of disclosure by Experian (as evidence by written records)

8. INDEMNITY

The Client shall indemnify and keep indemnified Experian from and against any and all liability loss claims demands costs or expenses of any kind whatsoever which shall at any time suffer or incur and which arise out of or in connection with the services provided that this indemnity shall not apply to the extent that any such liability arises of the default of Experian.

9. DATA PROTECTION ACT 1984

The Client undertakes that at all times they shall comply fully with the provisions of the Data Protection Act 1984 and any subsequent amendments thereto or re-enactments thereof.

10. TERMINATION

10.1 Experian shall be entitled to terminate this Agreement immediately by written notice to the Client if:
10.1.1 The Client is guilty of any material breach of the provisions of this Agreement and such breach if capable of remedy is not remedied within twenty one working days of written notice having been given to remedy such breach.
10.1.2 The Client has had a bankruptcy order made against it or has made an arrangement or composition with its creditors or (being a body corporate) has had convened a meeting of creditors (whether formal or informal) or has entered into liquidation (whether voluntary or compulsory) except a solvent voluntary liquidation for the purpose only of reconstruction or amalgamation or has a receiver manager administrator or administrative receiver appointed of its undertaking or any part thereof or a resolution has been passed or a petition presented to any Court for the winding-up of the Client or for the granting of an administration order in respect of the Client or any proceedings have been commenced relating to the insolvency of the Client.
10.2 The termination of this Agreement shall be without prejudice to the rights of Experian accrued prior to such termination.

11. FORCE MAJEURE

Notwithstanding anything herein contained neither party shall be under any liability to the other in respect of any failure to perform or delay in performing any of the obligations hereunder which is due to any cause of whatever nature beyond its reasonable control and no such failure or delay shall be deemed for any purposes to be a breach of this Agreement.

12. ASSIGNMENT

The rights granted to the Client hereunder are personal to it and the Client shall not assign or grant any rights in respect of or otherwise deal in the same.

13. WAIVER

Failure by either party to enforce any of the provisions of this Agreement shall not operate as a waiver of any of its rights hereunder or operate so as to bar the exercise or enforcement thereof at any time or times.

14. VARIATIONS

This Agreement constitutes the whole of the terms agreed between the parties hereto in respect of the subject matter hereof and supersedes all previous negotiations, understandings or representations and shall be capable of being varied only by an instrument in writing signed by a duly authorized representative of each of the parties hereto.

15. NOTICE

Any notice to be given hereunder by either party to the other may be given by first class mail addressed to the party of the address herein specified or such other address as such party may from time to time nominate for the purpose hereof or by telex or telefax and shall be deemed to have been served:
15.1 if given by mail seventy-two hours after the same shall have been despatched and
15.2 if given by telex or telefax one hour after transmission (if transmitted during normal business hours) and twelve hours after transmission (if transmitted outside normal business hours).

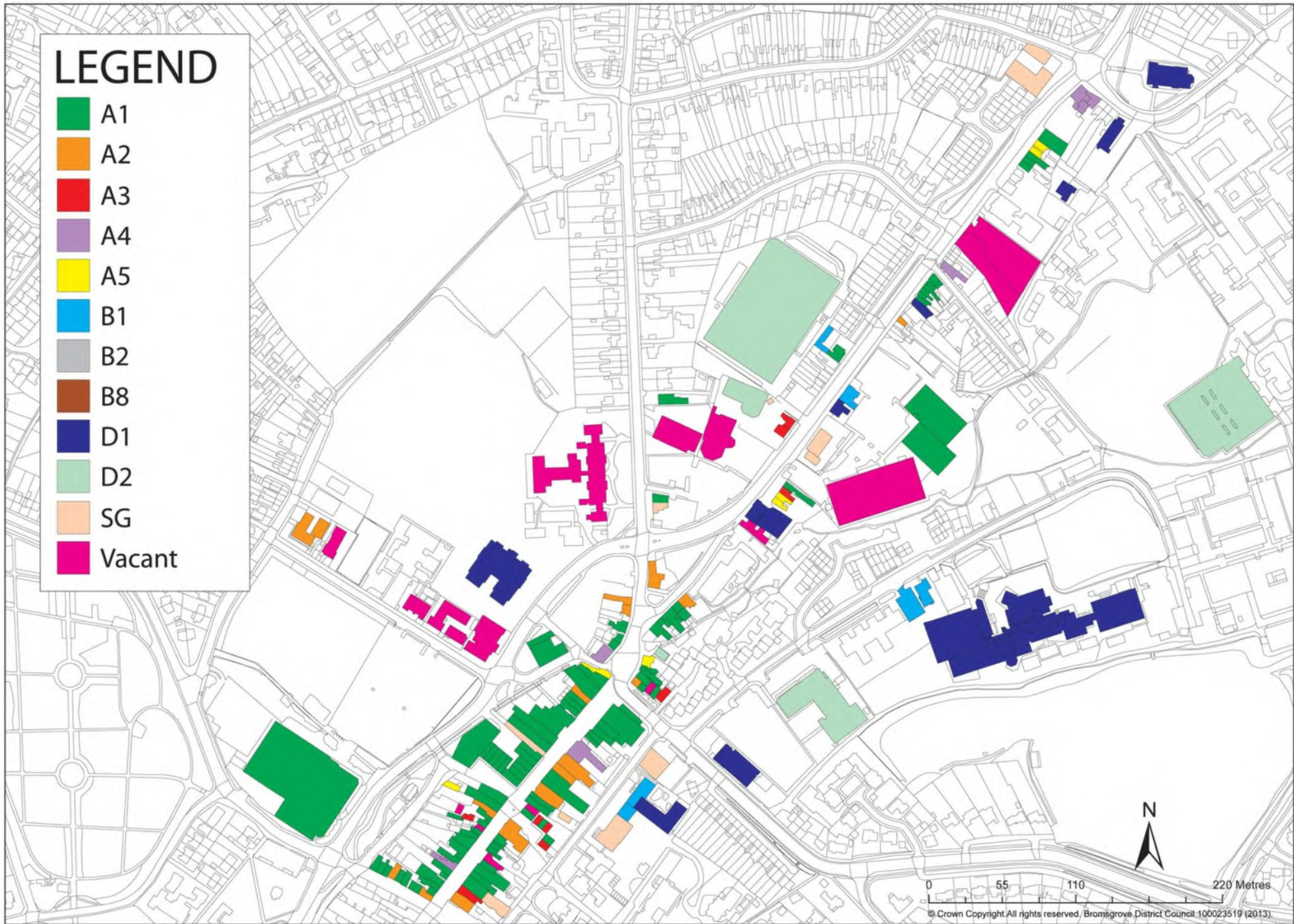
16. SEVERANCE

This Agreement is severable in that if any provision hereof is determined to be illegal or unenforceable by any Court or competent jurisdiction such provision shall be deemed to have been deleted without affecting the remaining provisions of this Agreement.

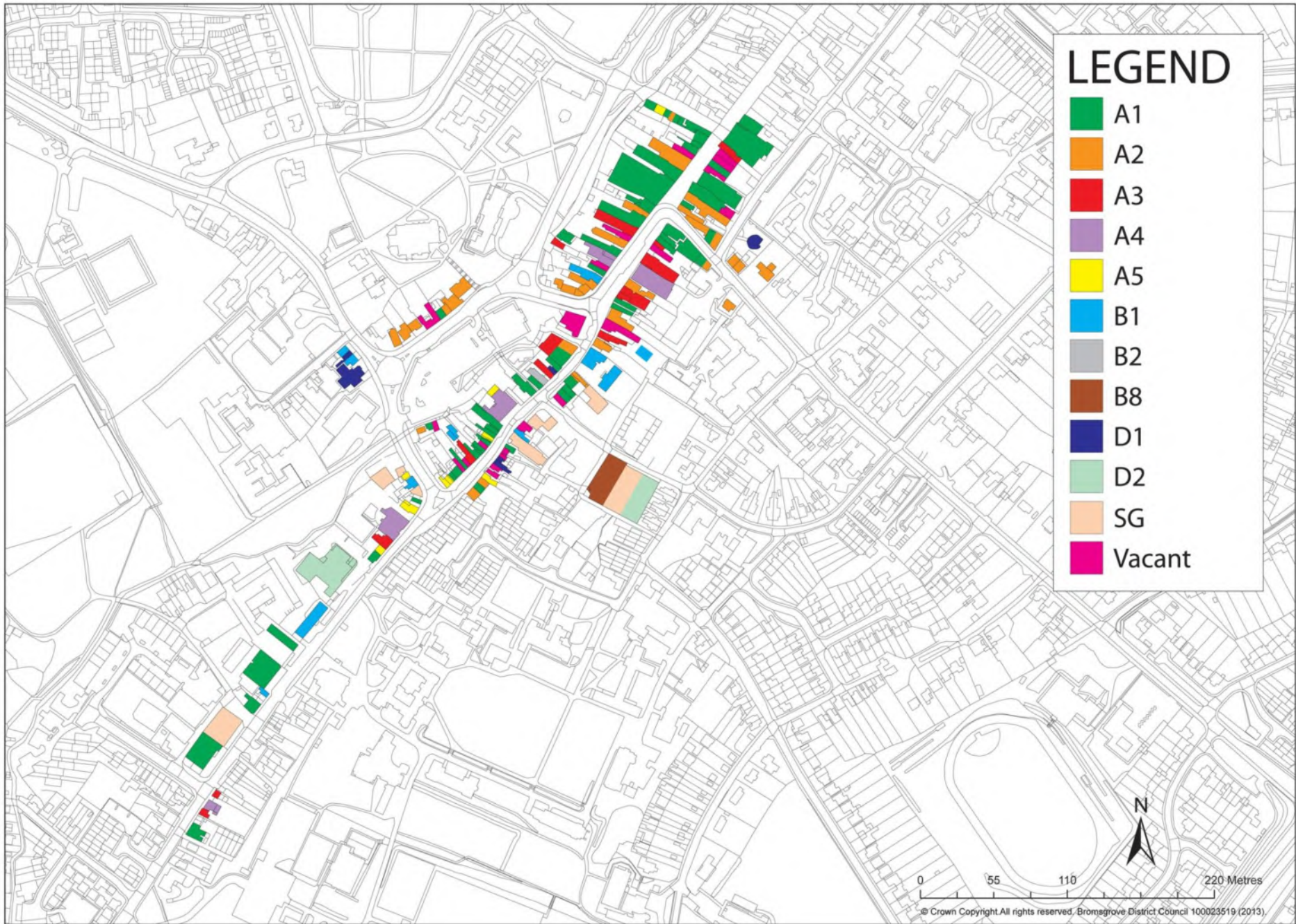
17. LAW

This Agreement shall be governed by and construed in accordance with English Law and the parties hereto agree that the English Courts shall have exclusive jurisdiction.

**Appendix D: Town Centre Use Maps
North**



South



Appendix E: Pedestrian Footfall

June 2009

Date	Day	Time	Weather	Location	Count from Top to Bottom	Count from Bottom to Top	Total
11.6.09	Thursday, non-market	0913 to 0923	Sunny	1	64	51	115
11.6.09	Thursday, non-market	0930 to 0940	Sunny	3	191	N/A	191
11.6.09	Thursday, non-market	0930 to 0940	Sunny	2	125	N/A	125
11.6.09	Thursday, non-market	0944 to 0954	Sunny	4	69	63	132
11.6.09	Thursday, non-market	0958 to 1008	Sunny	5	65	76	141
11.6.09	Thursday, non-market	1220 to 1230	Rain	4	44	24	68
11.6.09	Thursday, non-market	1233 to 1243	Rain	3	86	N/A	86
11.6.09	Thursday, non-market	1233 to 1243	Rain	2	142	N/A	142
11.6.09	Thursday, non-market	1244 to 1254	Light Rain	1	70	81	151
11.6.09	Thursday, non-market	1256 to 1306	Sunny	5	60	55	115
11.6.09	Thursday, non-market	1533 to 1543	Sunny	1	88	86	174
11.6.09	Thursday, non-market	1544 to 1554	Sunny	3	94	N/A	94
11.6.09	Thursday, non-market	1544 to 1554	Sunny	2	129	N/A	129
11.6.09	Thursday, non-market	1557 to 1607	Sunny	4	68	96	164
11.6.09	Thursday, non-market	1608 to 1618	Sunny	5	66	37	103
13.6.09	Saturday, market day	0925 to 0935	Sunny	1	103	67	170
13.6.09	Saturday, market day	0936 to 0946	Sunny	2	197	N/A	197
13.6.09	Saturday, market day	0936 to 0946	Sunny	3	199	N/A	199
13.6.09	Saturday, market day	0949 to 0959	Sunny	5	78	122	200
13.6.09	Saturday, market day	1004 to 1014	Sunny	4	114	94	208
13.6.09	Saturday, market day	1206 to 1216	Sunny	1	220	176	396
13.6.09	Saturday, market day	1218 to 1228	Sunny	3	345	N/A	345
13.6.09	Saturday, market day	1218 to 1228	Sunny	2	341	N/A	341
13.6.09	Saturday, market day	1237 to 1247	Sunny	4	158	143	301
13.6.09	Saturday, market day	1253 to 1303	Sunny	5	213	187	400
13.6.09	Saturday, market day	1502 to 1512	Sunny	1	128	103	231
13.6.09	Saturday, market day	1513 to 1523	Sunny	3	174	N/A	174
13.6.09	Saturday, market day	1513 to 1523	Sunny	2	173	N/A	173
13.6.09	Saturday, market day	1524 to 1534	Sunny	5	93	69	162
13.6.09	Saturday, market day	1537 to 1547	Sunny	4	104	85	189
26.6.09	Friday, market day	0907 to 0917	Cloudy	1	60	36	96
26.6.09	Friday, market day	0918 to 0928	Cloudy	3	150	N/A	150
26.6.09	Friday, market day	0918 to 0928	Cloudy	2	109	N/A	109
26.6.09	Friday, market day	0943 to 0953	Cloudy	4	61	65	126
26.6.09	Friday, market day	0930 to 0940	Cloudy	5	82	82	164
26.6.09	Friday, market day	1258 to 1308	Rain	4	89	63	152
26.6.09	Friday, market day	1225 to 1235	Heavy rain	3	76	N/A	76
26.6.09	Friday, market day	1225 to 1235	Heavy rain	2	104	N/A	104
26.6.09	Friday, market day	1200 to 1210	Cloudy	1	134	119	253
26.6.09	Friday, market day	1213 to 1223	Cloudy	5	117	80	197
26.6.09	Friday, market day	1515 to 1525	Cloudy, Music band	1	267	93	360
26.6.09	Friday, market day	1529 to 1539	Cloudy	3	125	N/A	125
26.6.09	Friday, market day	1529 to 1539	Cloudy	2	151	N/A	151

26.6.09	Friday, market day	1555 to 1605	Cloudy	4	98	98	196
26.6.09	Friday, market day	1541 to 1551	Cloudy	5	74	84	158

June 2010

Date	Day	Time	Weather	Location	Count from Top to Bottom	Count from Bottom to Top	Total
11.06.2010	Friday, market day	0920 to 0930	Cloudy	1	59	58	117
11.06.2010	Friday, market day	0933 to 0943	Cloudy	2	90	N/A	90
11.06.2010	Friday, market day	0933 to 0943	Cloudy	3	144	N/A	144
11.06.2010	Friday, market day	0945 to 0955	Cloudy	4	104	92	196
11.06.2010	Friday, market day	0957 to 1007	Cloudy	5	105	121	226
11.06.2010	Friday, market day	1201 to 1211	Cloudy	1	106	144	250
11.06.2010	Friday, market day	1213 to 1223	Cloudy	2	128	N/A	128
11.06.2010	Friday, market day	1213 to 1223	Cloudy	3	231	N/A	231
11.06.2010	Friday, market day	1224 to 1234	Cloudy	4	113	76	189
11.06.2010	Friday, market day	1237 to 1247	Cloudy	5	138	157	295
11.06.2010	Friday, market day	1506 to 1516	Cloudy	1	92	88	180
11.06.2010	Friday, market day	1517 to 1527	Cloudy	2	88	N/A	88
11.06.2010	Friday, market day	1517 to 1527	Cloudy	3	211	N/A	211
11.06.2010	Friday, market day	1529 to 1539	Cloudy	4	105	83	188
11.06.2010	Friday, market day	1542 to 1552	Cloudy	5	95	113	208
12.06.2010	Saturday, market day	0922 to 932	Cloudy	1	59	96	155
12.06.2010	Saturday, market day	0934 to 0944	Cloudy	2	131	N/A	131
12.06.2010	Saturday, market day	0934 to 0944	Cloudy	3	179	N/A	179
12.06.2010	Saturday, market day	0946 to 0956	Cloudy	4	124	80	204
12.06.2010	Saturday, market day	1000 to 1010	Cloudy	5	147	154	301
12.06.2010	Saturday, market day	1214 to 1224	Cloudy	1	185	181	366
12.06.2010	Saturday, market day	1225 to 1235	Cloudy	2	182	N/A	182
12.06.2010	Saturday, market day	1225 to 1235	Cloudy	3	291	N/A	291
12.06.2010	Saturday, market day	1237 to 1247	Cloudy	4	137	112	249
12.06.2010	Saturday, market day	1250 to 1300	Cloudy	5	139	163	302
12.06.2010	Saturday, market day	1507 to 1517	Sunny	1	97	143	240
12.06.2010	Saturday, market day	1519 to 1529	Sunny	2	142	N/A	142
12.06.2010	Saturday, market day	1519 to 1529	Sunny	3	210	N/A	210
12.06.2010	Saturday, market day	1534 to 1544	Sunny	4	88	102	190
12.06.2010	Saturday, market day	1547 to 1557	Sunny	5	138	198	336
16.06.2010	Wednesday, non-market	0907 to 0917	Sunny	1	48	56	104
16.06.2010	Wednesday, non-market	0919 to 0929	Sunny	2	117	N/A	117
16.06.2010	Wednesday, non-market	0919 to 0929	Sunny	3	121	N/A	121
16.06.2010	Wednesday, non-market	0933 to 0943	Sunny	4	72	42	114
16.06.2010	Wednesday, non-market	0947 to 0957	Sunny	5	121	101	222
16.06.2010	Wednesday, non-market	1214 to 1224	Sunny	1	83	118	201
16.06.2010	Wednesday, non-market	1225 to 1235	Sunny	2	112	N/A	112
16.06.2010	Wednesday, non-market	1225 to 1235	Sunny	3	156	N/A	156
16.06.2010	Wednesday, non-market	1238 to 1248	Sunny	4	97	118	215
16.06.2010	Wednesday, non-market	1253 to 1303	Sunny	5	102	137	239
16.06.2010	Wednesday, non-market	1514 to 1524	Sunny	1	46	252	298
16.06.2010	Wednesday, non-market	1526 to 1536	Sunny	2	70	N/A	70

16.06.2010	Wednesday, non-market	1526 to 1536	Sunny	3	126	N/A	126
16.06.2010	Wednesday, non-market	1538 to 1548	Sunny	4	52	64	116
16.06.2010	Wednesday, non-market	1551 to 1601	Sunny	5	103	92	195

July 2011

Date	Day	Time	Weather	Location	Count from Top to Bottom	Count from Bottom to Top	Total
13.07.11	Wednesday, non-market	0900 to 0910	Cloudy	1	24	43	67
13.07.11	Wednesday, non-market	0913 to 0923	Cloudy	2	91	N/A	91
13.07.11	Wednesday, non-market	0913 to 0923	Cloudy	3	59	N/A	59
13.07.11	Wednesday, non-market	0925 to 0935	Cloudy	4	83	66	149
13.07.11	Wednesday, non-market	0938 to 0948	Cloudy	5	53	19	72
13.07.11	Wednesday, non-market	1214 to 1224	Cloudy	1	79	75	154
13.07.11	Wednesday, non-market	1226 to 1236	Cloudy	2	201	N/A	201
13.07.11	Wednesday, non-market	1226 to 1236	Cloudy	3	170	N/A	170
13.07.11	Wednesday, non-market	1238 to 1248	Cloudy	4	94	119	213
13.07.11	Wednesday, non-market	1254 to 1304	Cloudy	5	91	89	180
13.07.11	Wednesday, non-market	1513 to 1523	Cloudy	1	68	208	276
13.07.11	Wednesday, non-market	1525 to 1535	Cloudy	2	104	N/A	104
13.07.11	Wednesday, non-market	1525 to 1535	Cloudy	3	114	N/A	114
13.07.11	Wednesday, non-market	1537 to 1547	Cloudy	4	79	88	157
13.07.11	Wednesday, non-market	1553 to 1603	Cloudy	5	68	72	140
15.07.11	Friday, market day	0904 to 0914	Cloudy	1	55	58	113
15.07.11	Friday, market day	0917 to 0927	Cloudy	2	178	N/A	178
15.07.11	Friday, market day	0917 to 0927	Cloudy	3	156	N/A	156
15.07.11	Friday, market day	0935 to 0945	Cloudy	4	110	133	243
15.07.11	Friday, market day	0950 to 1000	Cloudy	5	142	70	212
15.07.11	Friday, market day	1210 to 1220	Cloudy	1	113	140	253
15.07.11	Friday, market day	1222 to 1232	Sunny	2	219	N/A	219
15.07.11	Friday, market day	1222 to 1232	Sunny	3	202	N/A	202
15.07.11	Friday, market day	1235 to 1245	Sunny	4	92	129	221
15.07.11	Friday, market day	1250 to 1300	Cloudy	5	119	88	207
15.07.11	Friday, market day	1500 to 1510	Cloudy	1	66	119	185
15.07.11	Friday, market day	1512 to 1522	Cloudy	2	184	N/A	184
15.07.11	Friday, market day	1512 to 1522	Cloudy	3	163	N/A	163
15.07.11	Friday, market day	1525 to 1535	Cloudy	4	99	111	210
15.07.11	Friday, market day	1539 to 1545	Cloudy	5	69	120	189
16.07.11	Saturday, market day	0918 to 0928	Heavy Rain	1	50	70	120
16.07.11	Saturday, market day	0931 to 0941	Heavy Rain	2	118	N/A	118
16.07.11	Saturday, market day	0931 to 0941	Heavy Rain	3	81	N/A	81
16.07.11	Saturday, market day	0944 to 0954	Rain	4	53	53	106
16.07.11	Saturday, market day	0953 to 1003	Rain	5	58	51	109
16.07.11	Saturday, market day	1208 to 1218	Cloudy	1	123	154	277
16.07.11	Saturday, market day	1220 to 1230	Sunny	2	217	N/A	217
16.07.11	Saturday, market day	1220 to 1230	Sunny	3	216	N/A	216
16.07.11	Saturday, market day	1232 to 1242	Sunny	4	109	202	311

16.07.11	Saturday, market day	1247 to 1257	Cloudy	5	77	88	165
16.07.11	Saturday, market day	1501 to 1511	Light Rain	1	101	105	206
16.07.11	Saturday, market day	1515 to 1525	Cloudy	2	132	N/A	132
16.07.11	Saturday, market day	1515 to 1525	Cloudy	3	136	N/A	136
16.07.11	Saturday, market day	1527 to 1537	Light Rain	4	98	127	225
16.07.11	Saturday, market day	1542 to 1552	Sunny	5	59	79	138

July 2012

Date	Day	Time	Weather	Location	Count from Top to Bottom	Count from Bottom to Top	Total
12.07.12	Wednesday, non-market	0912 to 0922	Sunny	1	58	41	99
12.07.12	Wednesday, non-market	0924 to 0934	Sunny	2	116	N/A	116
12.07.12	Wednesday, non-market	0925 to 0934	Sunny	3	110	N/A	110
12.07.12	Wednesday, non-market	0936 to 0946	Sunny	4	59	41	100
12.07.12	Wednesday, non-market	0950 to 1000	Sunny	5	51	47	98
12.07.12	Wednesday, non-market	1223 to 1233	Cloudy	1	95	74	169
12.07.12	Wednesday, non-market	1236 to 1246	Sunny	2	158	N/A	158
12.07.12	Wednesday, non-market	1236 to 1246	Sunny	3	155	N/A	155
12.07.12	Wednesday, non-market	1249 to 1259	Sunny	4	99	73	172
12.07.12	Wednesday, non-market	1306 to 1316	Sunny	5	107	117	224
12.07.12	Wednesday, non-market	1522 to 1532	Cloudy	1	79	193	272
12.07.12	Wednesday, non-market	1534 to 1544	Cloudy	2	138	N/A	138
12.07.12	Wednesday, non-market	1534 to 1544	Cloudy	3	154	N/A	154
12.07.12	Wednesday, non-market	1547 to 1557	Cloudy	4	67	71	138
12.07.12	Wednesday, non-market	1601 to 1611	Light Rain	5	81	59	140
13.07.12	Friday, market day	0924 to 0934	Light Rain	1	97	50	147
13.07.12	Friday, market day	0937 to 0947	Cloudy	2	164	N/A	164
13.07.12	Friday, market day	0937 to 0947	Cloudy	3	115	N/A	115
13.07.12	Friday, market day	0950 to 1000	Cloudy	4	79	55	134
13.07.12	Friday, market day	1005 to 1015	Cloudy	5	90	92	182
13.07.12	Friday, market day	1232 to 1242	Cloudy	1	134	106	240
13.07.12	Friday, market day	1244 to 1254	Cloudy	2	208	N/A	208
13.07.12	Friday, market day	1244 to 1254	Cloudy	3	203	N/A	203
13.07.12	Friday, market day	1257 to 1307	Cloudy	4	80	78	158
13.07.12	Friday, market day	1312 to 1322	Cloudy	5	82	147	229
13.07.12	Friday, market day	1522 to 1532	Cloudy	1	184	104	288
13.07.12	Friday, market day	1535 to 1545	Sunny	2	155	N/A	155
13.07.12	Friday, market day	1535 to 1545	Sunny	3	178	N/A	178
13.07.12	Friday, market day	1548 to 1558	Cloudy	4	95	85	180
13.07.12	Friday, market day	1602 to 1612	Cloudy	5	78	106	184
14.07.12	Saturday, market day	0933 to 0943	Cloudy	1	98	76	174
14.07.12	Saturday, market day	0948 to 0958	Cloudy	2	154	N/A	154
14.07.12	Saturday, market day	0948 to 0958	Cloudy	3	236	N/A	236
14.07.12	Saturday, market day	1000 to 1010	Cloudy	4	63	75	138
14.07.12	Saturday, market day	1012 to 1022	Cloudy	5	79	98	177
14.07.12	Saturday, market day	1242 to 1252	Sunny	1	157	222	379
14.07.12	Saturday, market day	1254 to 1304	Sunny	2	365	N/A	365

Date	Day	Time	Weather	Location	Count from Top to Bottom	Count from Bottom to Top	Total
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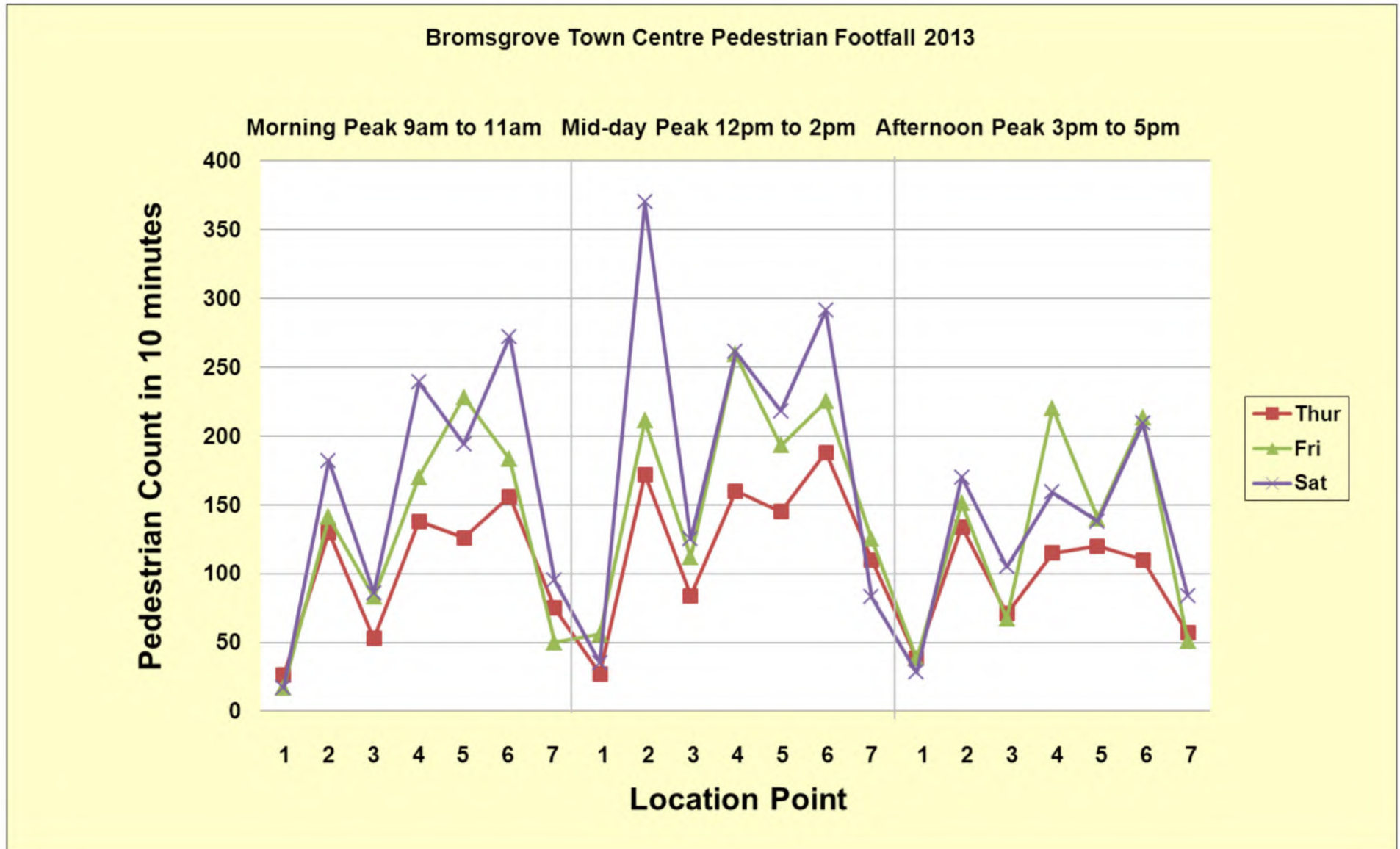
14.07.12	Saturday, market day	1254 to 1304	Sunny	3	353	N/A	353
14.07.12	Saturday, market day	1307 to 1317	Cloudy	4	85	108	193
14.07.12	Saturday, market day	1323 to 1333	Cloudy	5	125	188	313
14.07.12	Saturday, market day	1500 to 1510	Cloudy	1	88	137	225
14.07.12	Saturday, market day	1512 to 1522	Cloudy	2	184	N/A	184
14.07.12	Saturday, market day	1512 to 1522	Cloudy	3	254	N/A	254
14.07.12	Saturday, market day	1524 to 1534	Cloudy	4	123	97	220
14.07.12	Saturday, market day	1539 to 1549	Cloudy	5	130	191	321

July 2013

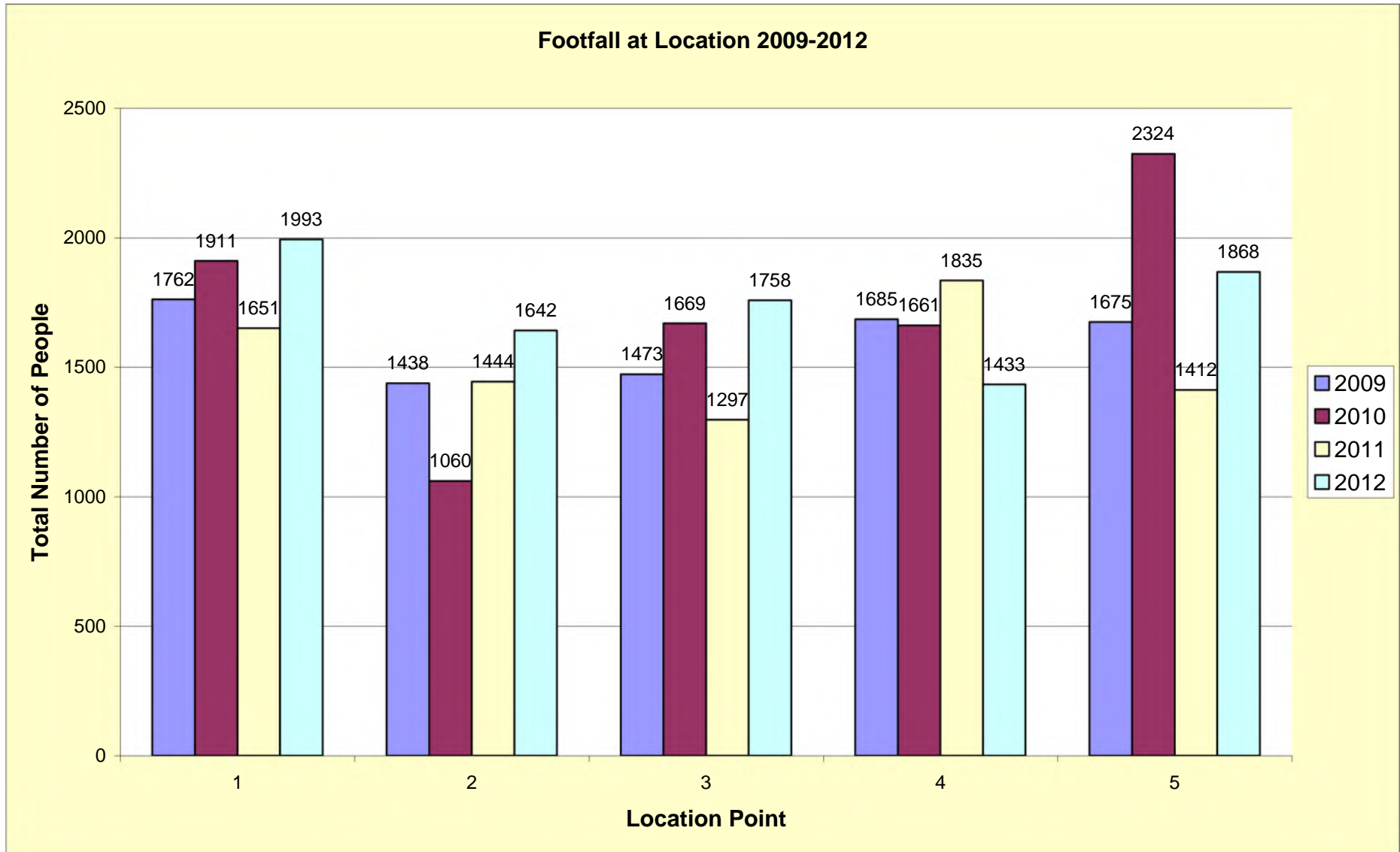
11.07.2013	Thursday, non-market day	0910 - 0920	Sunny	1	17	9	26
11.07.2013	Thursday, non-market day	0924 - 0934	Sunny	2	84	46	130
11.07.2013	Thursday, non-market day	0936 - 0946	Sunny	3	23	30	53
11.07.2013	Thursday, non-market day	0947 - 0957	Sunny	4	62	76	138
11.07.2013	Thursday, non-market day	1000 - 1010	Sunny	5	75	51	126
11.07.2013	Thursday, non-market day	1015 - 1025	Sunny	6	96	60	156
11.07.2013	Thursday, non-market day	1027 - 1037	Sunny	7	19	56	75
11.07.2013	Thursday, non-market day	1206 - 1216	Sunny	1	13	14	27
11.07.2013	Thursday, non-market day	1220 - 1230	Sunny	2	81	91	172
11.07.2013	Thursday, non-market day	1234 - 1244	Sunny	3	37	47	84
11.07.2013	Thursday, non-market day	1245 - 1255	Sunny	4	85	75	160
11.07.2013	Thursday, non-market day	1257 - 1307	Sunny	5	72	73	145
11.07.2013	Thursday, non-market day	1312 - 1322	Sunny	6	106	82	188
11.07.2013	Thursday, non-market day	1225 - 1235	Sunny	7	39	71	110
11.07.2013	Thursday, non-market day	1521 - 1531	Sunny	1	18	20	38
11.07.2013	Thursday, non-market day	1534 - 1544	Sunny	2	56	78	134
11.07.2013	Thursday, non-market day	1546 - 1556	Sunny	3	41	30	71
11.07.2013	Thursday, non-market day	1557 - 1607	Sunny	4	71	44	115
11.07.2013	Thursday, non-market day	1608 - 1618	Sunny	5	57	63	120
11.07.2013	Thursday, non-market day	1622 - 1632	Sunny	6	68	42	110
11.07.2013	Thursday, non-market day	1633 - 1643	Sunny	7	26	31	57
05.07.2013	Friday, market day	0907 - 0917	Sunny	1	3	14	17
05.07.2013	Friday, market day	0919 - 0929	Sunny	2	89	52	141
05.07.2013	Friday, market day	0934 - 0944	Sunny	3	44	39	83
05.07.2013	Friday, market day	0945 - 0955	Sunny	4	83	87	170
05.07.2013	Friday, market day	0958 - 1008	Sunny	5	111	117	228
05.07.2013	Friday, market day	1013 - 1023	Sunny	6	103	80	183
05.07.2013	Friday, market day	1026 - 1036	Sunny	7	25	25	50
05.07.2013	Friday, market day	1205 - 1215	Sunny	1	21	35	56
05.07.2013	Friday, market day	1219 - 1229	Sunny	2	126	85	211
05.07.2013	Friday, market day	1232 - 1242	Sunny	3	60	52	112
05.07.2013	Friday, market day	1244 - 1254	Sunny	4	148	111	259
05.07.2013	Friday, market day	1256 - 1306	Sunny	5	87	106	193
05.07.2013	Friday, market day	1311 - 1321	Sunny	6	103	122	225
05.07.2013	Friday, market day	1324 - 1334	Sunny	7	62	63	125
05.07.2013	Friday, market day	1500 - 1510	Sunny	1	22	16	38
05.07.2013	Friday, market day	1520 - 1530	Sunny	2	80	71	151
05.07.2013	Friday, market day	1534 - 1544	Sunny	3	31	36	67
05.07.2013	Friday, market day	1545 - 1555	Sunny	4	106	114	220
05.07.2013	Friday, market day	1557 - 1607	Sunny	5	64	76	140
05.07.2013	Friday, market day	1612 - 1622	Sunny	6	136	77	213
05.07.2013	Friday, market day	1624 - 1634	Sunny	7	32	19	51
13.07.2013	Saturday, market day	0906 - 0916	Sunny	1	4	13	17
13.07.2013	Saturday, market day	0920 - 0930	Sunny	2	101	81	182
13.07.2013	Saturday, market day	0932 - 0942	Sunny	3	28	58	86

13.07.2013	Saturday, market day	0945 - 0955	Sunny	4	104	135	239
13.07.2013	Saturday, market day	0958 - 1008	Sunny	5	94	100	194
13.07.2013	Saturday, market day	1012 - 1022	Sunny	6	146	126	272
13.07.2013	Saturday, market day	1024 - 1034	Sunny	7	63	32	95
13.07.2013	Saturday, market day	1201 - 1211	Sunny	1	20	15	35
13.07.2013	Saturday, market day	1215 - 1125	Sunny	2	167	203	370
13.07.2013	Saturday, market day	1228 - 1238	Sunny	3	66	59	125
13.07.2013	Saturday, market day	1242 - 1252	Sunny	4	157	104	261
13.07.2013	Saturday, market day	1254 - 1304	Sunny	5	113	105	218
13.07.2013	Saturday, market day	1308 - 1318	Sunny	6	158	133	291
13.07.2013	Saturday, market day	1323 - 1333	Sunny	7	38	45	83
13.07.2013	Saturday, market day	1501 - 1511	Sunny	1	10	18	28
13.07.2013	Saturday, market day	1515 - 1525	Sunny	2	69	101	170
13.07.2013	Saturday, market day	1528 - 1638	Sunny	3	49	56	105
13.07.2013	Saturday, market day	1539 - 1549	Sunny	4	84	75	159
13.07.2013	Saturday, market day	1552 - 1604	Sunny	5	74	64	138
13.07.2013	Saturday, market day	1606 - 1616	Sunny	6	127	82	209
13.07.2013	Saturday, market day	1623 - 1633	Sunny	7	42	42	84

Pedestrian Footfall 2013



Pedestrian Footfall at Location from 2009 to 2012





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Bromsgrove
District Council

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