

BROMSGROVE TOWN CENTRE

Retail Capacity Analysis

November 2010

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EXECUTIVE SUMMARY

1. This study examines the future capacity for new retail floorspace in Bromsgrove town centre between 2010 and 2025, taking into account projected increases in population, projected increases in expenditure per person, overtrading of existing stores and the potential for improving Bromsgrove's market share.
2. The population within the Bromsgrove zone (Zone 1) is projected to increase to 79,553 by 2025 which equates to a percentage increase of 17% (Pitney Bowes forecasts) over the study period.
3. The study identifies no quantitative capacity for additional convenience floorspace (using the static and increased retention scenarios).
4. The study identifies up to 7,910 sqm net of indicative comparison capacity by 2015, rising to 16,560 sqm net by 2025.
5. The capacity identified is indicative and based on the latest updates to forecasting. Based on this indicative capacity, there is potential to identify sites within Bromsgrove to accommodate comparison floorspace but there is no need to identify sites for convenience retail.
6. We recommend that the overall strategy for improving the quality of provision in Bromsgrove town centre should consider the comparison capacity identified and should direct any new floorspace towards the town centre.
7. The level of convenience capacity has decreased since the 2007 retail study update. This is a result of decreased growth rate projections since the last study resulting in decreased expenditure growth and the impact of commitments on the level of residual spending to support new retail floorspace. The new commitments include planning permission for the redevelopment of Bromsgrove Retail Park, Aldi at the BGW Business Park and a retail warehouse at Sherwood Road.
8. This study does not examine qualitative issues but makes recommendations on the type and size of floorspace that the Council may seek to encourage within the town centre.
9. We recommend that to accommodate the capacity for new comparison floorspace, the Council should encourage the provision of new floorspace in the centre which will appeal to mid-market retailers such as River Island and H&M, subject to demand. These retailers typically require units in the region of 280 sqm net (3,000 sqft net) to 650 sqm net (7,000 sqft net). H&M require units of between 650 sqm net (7,000 sqft net) to 1,115 sqm net (12,000 sqft net).
10. The shopping environment, the configuration of the unit and its location relative to the prime pitch and other key retailers will all play an important part. Any proposals will need to consider these factors as well as the types of retailers the Council are seeking to attract.

1.0 Introduction

PURPOSE OF REPORT

- 1.1 CB Richard Ellis has been appointed by Bromsgrove District Council to update the quantitative retail capacity element of the Town Centre Study of April 2004 and Bromsgrove Retail Capacity Study 2007.
- 1.2 The update has been commissioned to inform the emerging Bromsgrove Town Centre Area Action Plan as well as reflecting the requirements of PPS4 published in December 2009 and the advice set out in the associated companion guide.

OVERALL APPROACH

- 1.3 This update includes an assessment of both comparison and convenience goods and follows a standard step by step methodology. This is consistent with the approach set out in the PPS4 companion guide.
- 1.4 CB Richard Ellis has not carried out any further qualitative assessment of the town centre or individual sites identified for possible development, though we have highlighted key areas of the 2004 and 2007 studies that are of relevance to the updated capacity analysis.
- 1.5 We have also made brief recommendations on the size of new units that the Council should encourage in the centre.
- 1.6 The study relies on a household survey undertaken in 2004 which provides the market shares on which the retail capacity analysis is based. Although the survey was undertaken six years ago, we are advised by officers that, in their view, shopping patterns are unlikely to have changed. Nevertheless, given the age of the household survey, the outputs of the study should be used with caution.

2.0 Method

- 2.1 The key consideration in this update is the revised level of available expenditure to support convenience (food and non-alcoholic beverages, tobacco, alcoholic beverages, newspapers, non-durable household goods) and comparison (non convenience goods items including furniture, electrical household goods and medical goods) goods floorspace. This reflects the current economic climate and has factored in the latest population growth estimates from Pitney Bowes.
- 2.2 As far as possible, this update has adopted the same methodologies as the previous 2007 update study and the study area remains the same. The test dates have been revised to 2010, 2015, 2020 and 2025. When allowing for these, the 2007 retail study update and this study cannot be compared like-to-like. The emphasis should be placed on the 2010 data which takes account of the most up-to-date assumptions.
- 2.3 To summarise, the focus of this assessment is based upon quantitative need and this update is a revision based upon changes to the following:
 - Population;
 - Expenditure per head;
 - Expenditure growth;
 - Special Forms of Trading;
 - Estimated benchmark turnovers;
 - Turnover efficiency; and
 - Floorspace variations resulting from vacancies and commitments.
- 2.4 As set out on the 2004 and 2007 studies, the study area has been divided into five separate zones. This is illustrated at Appendix 1. These include:
 - Zone 1 – Bromsgrove
 - Zone 2 – Northfield
 - Zone 3 – Redditch
 - Zone 4 – Droitwich
 - Zone 5 – Kidderminster
- 2.5 The population figures for 2010 to 2019 have been calculated using a CB Richard Ellis Area Profile Report (which uses the latest population data from Pitney Bowes) based on the catchment area postcodes used in the 2004 Town Centre Study. The data provided by Pitney Bowes provides population forecasts up to 2019 and CB Richard Ellis have therefore projected the 2020 and 2025 figures based on the percentage increase over the preceding years.
- 2.6 The update relies on the household survey which was commissioned as part of the 2004 study. The market shares therefore remain consistent with the 2004 study.
- 2.7 The convenience stores in Bromsgrove¹ capture 15.8% of all available expenditure from the study area. In each zone, Bromsgrove captures:

¹ Stores in Bromsgrove are all convenience stores across Zone 1 regardless of whether they are in within, the edge of or out of centre.

- 75 % of all available convenience expenditure from residents of Zone 1;
 - 6% of all available convenience expenditure from residents of Zone 2;
 - 4 % of all available expenditure from residents of Zone 3;
 - 12 % of all available expenditure from residents of Zone 4;
 - 4 % of all available expenditure from residents of Zone 5.
- 2.8 The comparison stores in Bromsgrove capture 9.5% of all available expenditure from the study area. In each zone, Bromsgrove captures:
- 44 % of all available expenditure from residents of Zone 1;
 - 3 % of all available expenditure from residents of Zone 2;
 - 4 % of all available expenditure from residents of Zone 3;
 - 3 % of all available expenditure from residents of Zone 4;
 - 1 % of all available expenditure from residents of Zone 5;
- 2.9 Since the 2007 study, Pitney Bowes² have published their revised forecasts for expenditure which are set out in the Pitney Bowes Expenditure Guide 2010/2011. This brief sets out the latest trends in consumer retail expenditure per head on convenience and comparison goods in the United Kingdom.
- 2.10 We use the Pitney Bowes growth rates across the forecast period, set out below in Table 2.1:

Table 2.1
Growth Rates

| FORECAST PERIOD | CONVENIENCE (%) PA | COMPARISON (%) PA |
|-----------------|--------------------|-------------------|
| 2007 – 2008 | 0.4% | 2.8% |
| 2008 – 2009 | -1.5% | 3.8% |
| 2009 – 2010 | -0.1% | 1.3% |
| 2010 – 2015 | 0.4% | 3.7% |
| 2015 – 2025 | 0.4% | 3.8% |

Source: Pitney Bowes Expenditure Guide 2010/2011

- 2.11 Expenditure on Special Forms of Trading (SFT) is excluded from our capacity forecasts, as it does not generate a requirement for retail floorspace. SFT include mail order, vending machines and other non-store activity such as internet shopping. In considering SFT, we have made the deductions summarised in Table 2.2, based on the expenditure forecasts based on the Experian Retail Planner Note 8.1 (August 2010)³. This includes an allowance for ‘shelf picking’, where goods for home delivery are sourced from the shop floor rather than warehouse space.

² Pitney Bowes have incorporated MapInfo who were the previous suppliers of data for the 2004 and 2007 studies.

³ Pitney Bowes is our preferred data provider but do not provide advice on SFT across the forecast period. We therefore rely on data from Experian in this case.

Table 2.2
Special Forms of Trading

| FORECAST DATE | CONVENIENCE (%) PA | COMPARISON (%) PA |
|---------------|--------------------|-------------------|
| 2010 | 3.7% | 8.8% |
| 2015 | 4.7% | 10.4% |
| 2020 | 5% | 10.3% |
| 2025 | 5.3% | 10% |

Source: Appendix 3, Experian Retail Planner Note 8.1 (August 2010)

3.0 Capacity Findings

- 3.1 The key results of the update are summarised below, and a copy of the updated assessment tables are set out in Appendix 2.

Population – Table 1

- 3.2 Table 1 shows the forecast population across the zones up to 2025. The forecast population is based on Pitney Bowes population data. The table shows the overall population is projected to increase by 40,174 over the study period.
- 3.3 The largest increase in population is within the Bromsgrove zone (Zone 1) where the population is projected to increase to 79,553 by 2025 which equates to a percentage increase of 17%.
- 3.4 The emerging policy direction is to increase housing numbers in Bromsgrove to discourage outward migration from Bromsgrove town centre towards other areas outside the town and the District. We have reviewed the Pitney Bowes population data with the Worcestershire County Council research department and propose that the Pitney Bowes population forecasts are a broadly accurate reflection of likely future population growth including the resultant population change as a result of housing growth.

Expenditure – Table 2a

- 3.5 Since the 2007 retail study update was published there have been a number of revisions to the expenditure growth rate forecasts by Pitney Bowes and SFT growth by Experian.
- 3.6 Due to changes in growth rates and increase in the projected spend in SFT, total expenditure across the zones has decreased over the forecast period although it increases between 2010 and 2015. The available expenditure for 2010, i.e. the amount of spend available to support retail floorspace, is affected by two years of negative growth (2008 – 2010). The resultant increase in expenditure between 2010 and 2015 is a result of slightly positive growth in expenditure of 0.4% per year over this period. The growth in expenditure continues until 2025 but is counteracted by an increase in SFT.
- 3.7 The resultant forecast is for convenience expenditure to decrease slightly over the forecast period.
- 3.8 Over the same forecast period, there is a significant increase in comparison expenditure from £1,475m in 2010 growing to £2,019m by 2025. The growth rates for comparison goods are set out in the Growth Rates table above (Table 2.1) and show that the growth in comparison growth does not decrease over the forecast period and increases at a rate of 3.7% per annum or over from 2010 onwards.
- 3.9 The resultant forecast is for comparison expenditure to increase significantly over the forecast period.

Table 3.1

Total available expenditure 2010 - 2025

| YEAR | CONVENIENCE (£M) | COMPARISON (£M) |
|------|------------------|-----------------|
| 2010 | £802m | £1,475m |
| 2015 | £805m | £1,638m |
| 2020 | £800m | £1,816m |
| 2025 | £792m | £2,019m |

Source: Table 2a, Appendix 2

Expenditure by goods category – Table 2b

3.10 This table identifies the study area’s comparison goods expenditure by category. Whilst the level of expenditure per category has increased since the last study, the proportion spent on each comparison goods category remains approximately the same as the 2004 study. Clothing demonstrates the greatest draw over all zones at around 24%. There has been a slight increase in the proportion of expenditure for furniture, household textiles, audio-visual and chemists goods whilst there has been a decline in the percentage expenditure on DIY and other (including books, bikes and jewellery) goods.

Commitments

- 3.11 Since the 2007 Retail Study Update, there have been a number of planning permissions for new retail floorspace within Bromsgrove and, for the purposes of this study, have been considered commitments.
- 3.12 The table below provides a list of commitments within Bromsgrove and the amount of retail floorspace which will be provided (sqm net).

Table 3.2
Commitments

| PROPOSAL | CONVENIENCE FLOORSPACE (SQM NET) | COMPARISON FLOORSPACE (SQM NET) |
|---------------------------------------|----------------------------------|---------------------------------|
| Sainsbury’s, Bromsgrove Retail Park * | 3079 | -551 |
| Retail warehouse, Sherwood Road | | 3,716 |
| Aldi, BGW Business Park | 896 | 100 |
| Total | 3,975 | 3,265 |

* Convenience and comparison floorspace findings include the loss of retail floorspace from the redevelopment of the existing units within Bromsgrove Retail Park and replacement with Sainsbury’s.

Source: Planning applications submitted to Bromsgrove District Council

Scenario 1: Constant Market Share – Tables 3a – 5a(i)

- 3.13 Our starting point is to assume the current expenditure matches the current turnover of existing floorspace and is therefore in equilibrium at 2010.
- 3.14 A constant market share has been applied across the study period based upon the original household survey. This means we have projected that there will be no growth or decline in the current market share across the study period, i.e. there will be no change in shopping patterns. This is illustrated in Table 3a.
- 3.15 By applying the percentage market share for each zone (Table 3a) to the total available expenditure in that Zone (Table 2a) we have estimated the amount of residents’ spending within the study area (Table 5a) and excluded SFT which is applied throughout the forecast period.
- 3.16 At 2010, the residents within the study area have £802m to spend on convenience goods, decreasing to £792m by 2025. This is explained by low expenditure growth (including periods of expenditure decline) over the study period and growth in SFT which draws available expenditure away from retail stores.
- 3.17 Conversely, spending on comparison goods equals £1,475 m in 2010 rising to £2,019 by 2025. This is explained by reasonably high expenditure growth rate patterns over the study period.

- 3.18 By dividing the total spend by the quantity of convenience floorspace identified in the study area (10,397sqm) we estimate that the floorspace as a whole is turning over at about £12,139/sqm net.
- 3.19 Beyond 2010, after allowing for sales from existing convenience floorspace (Table 5a(i)), there is no residual spending to support new convenience floorspace over the forecast period. There is a negative residual spend of £-11.6m in 2015 decreasing to £62.8m by 2025. If an indicative company average turnover of £12,000/sqm is applied, there is no capacity during the forecast period. In other words this implies more floorspace will be provided than is required to meet the anticipated available expenditure.
- 3.20 A similar approach is taken when considering comparison capacity. The total available spending in the study area rises from £140.3m in 2010 to £202.4m in 2025. By dividing the total spend by the quantity of floorspace identified in the study area (24,168 sqm) we estimate that the floorspace as a whole is turning over at about £5,827sqm net.

Turnover efficiency

- 3.21 Turnover efficiency assumes that there is a realistic prospect that the efficiency of the floorspace will improve over time through a variety of measures such as an increase in productivity resulting from longer opening hours, more efficient use of floorspace and change in the type of goods retailed.
- 3.22 The study has used the Experian Retail Planner Note 8.1 to grow the existing convenience turnover for convenience and comparison goods by a given percentage per annum. The convenience turnover floorspace efficiency starts at 0% for 2010 and rises to 0.5% by 2025. The comparison turnover floorspace efficiency starts at 0.4% for 2010 and rises to 2.3% by 2025.

Capacity

- 3.23 The headline results for convenience and comparison goods are summarised in the table below, and the full analysis is presented at Appendix 2 (Scenario 1). The most relevant values are the residual spending figures to support new shops in monetary terms, as the exact volume of supportable floorspace will always be subject to assumptions made in terms of the sales density used for conversion.

Table 3.3
Indicative capacity for new retail floorspace (Scenario 1)

| | 2015 | 2020 | 2025 |
|---|-------|-------|--------|
| Convenience Goods | | | |
| Residual spending to support new retail floorspace (£m) | 11.6 | 11 | 10.5 |
| Indicative capacity for new floorspace (sqm net) | -970 | -920 | -880 |
| Comparison Goods | | | |
| Residual spending to support new retail floorspace (£m) | 29.1 | 49 | 70.1 |
| Indicative capacity for new floorspace (sqm net) | 4,860 | 8,170 | 11,680 |

Source: Table 5a & 5b, Appendix 2.

- 3.24 As you can see from the table above, there is no quantitative capacity for new convenience floorspace within the forecast period. This is largely as a result of the large quantum of committed convenience floorspace including new Sainsbury’s and Aldi foodstores.
- 3.25 There is quantitative capacity to support 4,860sqm of comparison floorspace at 2015. By 2020, there is £49m of residual spend by 2020 rising to £70.1m by 2025. This results in an indicative capacity of 11,680sqm net of comparison floorspace by 2025.

Scenario 2: Increase in market share – tables 3b – 5b (i)

- 3.26 As explained at paragraph 2.9, we assume under this scenario that stores within Zone 1 secure more of Zone 1’s expenditure than at present. This would be based on attracting more shoppers through an enhanced retail offer in Bromsgrove town centre and public realm improvements.
- 3.27 We have therefore applied a modest increased market share across the study period from 2015. This is illustrated at Table 3b.
- 3.28 The market share has been increased in 2015 to 80% (+5%) for convenience and 50% (+5%) for comparison goods. In our view this is the maximum level of retention we would expect for the town centre based on the improvements proposed. However, in regards to comparison retailing, the extent to which the market share can be increased is limited by the fact there are competing higher order centres in the retail hierarchy which may also look to improve their retail offers.
- 3.29 The same approach is then applied as set out in Scenario 1 and the increase in residual spending, i.e. expenditure available to support new floorspace and capacity is set out in the table below.

Table 3.4
Indicative capacity for new retail floorspace (Scenario 2)

| | 2015 | 2020 | 2025 |
|---|-------|--------|--------|
| Convenience Goods | | | |
| Residual spending to support new retail floorspace (£m) | 6.4 | 5.6 | -4.6 |
| Indicative capacity for new floorspace (sq m net) | -530 | -470 | -380 |
| Comparison Goods | | | |
| Residual spending to support new retail floorspace (£m) | 47.4 | 65.1 | 9.4 |
| Indicative capacity for new floorspace (sq m net) | 7,910 | 10,850 | 16,560 |

- 3.30 The capacity table shows that with an increased market share, the level of residual spending to support new comparison retail floorspace increases over the forecast period and provides a comparison capacity of 7,910 sq m net by 2010, rising to 16,560 sq m net by 2025.
- 3.31 Although the market share has increased, there is still not enough residual spend to support capacity for new convenience floorspace.
- 3.32 The capacity figures calculated for both scenarios should be regarded as indicative of the order of supportable floorspace within Bromsgrove and is based on the 2003 household survey and, as such, trading patterns may have changed and the results should be treated with some caution.

4.0 Conclusions

OVERALL ASSESSMENT

- 4.1 The focus of this assessment is based upon the quantitative capacity for new retail floorspace and this update is a revision based upon changes to the population, expenditure growth and decline, growth in Special Forms of Trading over the forecast period, assumed company turnovers based on the latest Verdict research and floorspace changes from the resultant growth in floorspace provision through commitments within Bromsgrove.
- 4.2 We have maintained the same market shares as the previous study and established two scenarios. Scenario 1 assumes that the market shares do not grow over the forecast period. Scenario 2 increases Zone 1's (Bromsgrove) market share by 5% for convenience (80%) and comparison (50%) from 2015 to 2025.
- 4.3 The study identifies quantitative capacity for up to 16,560sqm net (based on the increased retention scenario at 2025) of additional comparison goods floorspace over the study period to 2025.
- 4.4 The study identifies no additional convenience capacity over the study period. Indeed, it identifies a surplus of floorspace.
- 4.5 It should be noted that the capacity identified is indicative and based on the latest updates to forecasting.
- 4.6 Bromsgrove town centre is characterised by relatively small units, but mainstream retailers increasingly require larger units. As an indication of the recent trends, according to Verdict (Verdict on the High Street 2005), average stores sizes have increased by 8% since 1994 and Verdict predict they will continue to do so.
- 4.7 If the centre is to improve its market share, floorspace which meets the requirements of mainstream retailers will be required. According to the latest Verdict report (UK Fashion Multiple Retailers), fashion retailers such as River Island have requirements for units in the region of 280 sqm net (3,000 sqft net) to 650 sqm net (7,000 sqft net). H&M require units of between 650 sqm net (7,000 sqft net) to 1,115 sqm (12,000 sqft net). We recommend that the Council encourages the provision of new retail floorspace to meet these requirements, subject to it being satisfied that there is demand. Requirements for units in the order of 10,000 sqft net to 25,000 sqft net are not uncommon in town centres especially for larger format retailers such as Primark, and the Council may wish to investigate further whether there is potential interest from retailers seeking floorspace of this size.
- 4.8 National comparison retailers have very specific occupational requirements. These reflect their experience of operating effectively around the country and are generally only varied where the market is attractive and there is only a limited supply of suitable premises. Accordingly, the shopping environment, the configuration of the unit and its location relative to the prime pitch and other key retailers will all play an important part. In drafting its policies, the Council will need to consider these factors as well as the types of retailers the Council are seeking to attract.

FURTHER OUTPUTS REQUIRED

- 4.9 In allocating retail sites for future retail development, Bromsgrove District Council should identify an appropriate range of sites to accommodate the identified comparison capacity in accordance with Policy EC5 of PPS4.

- 4.10 As such, in developing the Bromsgrove Area Action plan and Bromsgrove Masterplan, the District should:
- Identify the appropriate scale of retail development which is in keeping with the role and function of the hierarchy of centres within the District and catchment served;
 - Apply the sequential approach to site selection;
 - Assess the impact of sites on existing centres;
 - Consider other considerations such as physical regeneration benefits, increased investment in the area or social inclusion.
- 4.11 This study should be combined with an up-to-date assessment of qualitative need for retail uses.
- 4.12 In the medium term, we strongly recommend undertaking a new district wide study underpinned by a new household survey. This reflects the requirements of PPS4.

GLOSSARY OF TERMS

Population projections

Estimates of future population based on Pitney Bowes Population Forecasts up to 2025.

Expenditure growth rates

Estimates of future increase/decrease in spend (£m) on certain types of goods. This is sourced from the Pitney Bowes Expenditure Guide 2010/2011.

Convenience goods expenditure

Expenditure on the following goods categories:

Food and non-alcoholic beverages, Tobacco, Alcoholic beverages (off-trade), Newspapers and periodicals, Non-durable household goods.

Comparison goods expenditure

Expenditure on goods in the following categories:

Clothing materials & garments, Shoes & other footwear, Materials for maintenance & repair of dwellings, Furniture & furnishings; carpets & other floor coverings, Household textiles, Major household appliances, whether electric or not, Small electric household appliances, Tools & miscellaneous accessories, Glassware, tableware & household utensils, Medical goods & other pharmaceutical products, Therapeutic appliances & equipment, Bicycles, Recording media, Games, toys & hobbies; sport & camping equipment; musical instruments, Gardens, plants & flowers, pets & related products, Books & stationary, Audio-visual, photographic and information processing equipment, Appliances for personal care, Jewellery, watches & clocks, Other personal effects.

Special forms of trading

All retail sales not in shops and stores; including sales via the internet, mail order, TV shopping, party plan, vending machines, door-to-door and temporary open market stalls.

Gross retail floor-space

The total built floor area measured externally which is occupied exclusively by a retailer or retailers; excluding open areas used for the storage, display or sale of goods.

Net retail sales area

The total build floor area measured internally which is used for the sale of retail goods.

Retail sales density

Convenience goods, comparison goods or all goods retail sales (stated as including or excluding VAT) for a specified year on the price basis indicated, divided by the net retail sales area generating those sales.

Floorspace efficiency

The percentage by which a retail sale density is assumed to increase annually in real terms over a stated period.

Quantitative capacity

Current and future retail capacity in numerical terms. Retail capacity is dependent on the following key factors:

- The economic capacity in terms of demand arising from expenditure growth within the catchment area of a proposal.
- Leakage of trade from an area, which suggests lack of provision to meet the needs of shoppers.
- Retailer requirements - demand from retailers for representation in a particular centre, and the potential for competition and innovation.

Leakage of trade

Expenditure which is spent outside the study area.

Overtrading

Overtrading is measured by comparing the total turnover potential of a store to the actual turnover which is derived from the household survey answers.

Store potential turnover

The potential turnover is measured by multiplying the net retail floorspace by the company average turnover.

Company average turnover

Company average turnovers are compiled from the food retailers' estimated company average sales densities based on Verdict research (2010).

ACKNOWLEDGEMENTS

1. Michael Rice, Worcestershire County Council Research
2. David Onions, Worcestershire County Council Research
3. Ross Walker, Bromsgrove District Council and Worcestershire County Council
4. Mike Dunphy, Bromsgrove District Council and Worcestershire County Council
5. Richard Savory, Bromsgrove District Council and Worcestershire County Council
6. CB Richard Ellis research department

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APPENDICES

1. Study area

2. Retail capacity tables
