Bromsgrove District Council
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TOWN CENTRE
HEALTH CHECK

JULY 2016

BROMSGROVE DISTRICT COUNCIL
PLANNING AND REGENERATION

Contents **Page**

Appendices

Tables and Figures

1. Introduction

1.1 The National Planning Policy Framework (NPPF) and the National Planning Practice Guidance (NPPG) were published in March 2012 and March 2014, respectively. Both supersede guidance contained in Planning Policy Statement 4 'Economic Development' (PPS4). The main purpose 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. Healthy town centres need to have a good mix of retail in order to remain competitive and 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. Therefore BDC carry out an annual health check of the Town Centre to monitor how it is performing in terms of for example footfall and vacancy rates.

Policy Context

1.4 The NPPG guides local planning authorities in realising the importance of articulating a positive vision or strategy for town centres, through the Local Plan. This is key to ensuring successful town centres which enable sustainable economic growth and provide a wide range of social and environmental benefits. To achieve this NPPG recommends all strategies should be based on evidence of the current state of town centres and opportunities to meet development needs and support their viability and vitality. The main purpose of this town centre health check is to monitor the vitality and viability of Bromsgrove Town Centre.

1.5 Although PPS4 has been deleted regarding the methodology for the health check process and identifying indicators, the accompanying practice guidance on 'Planning for Town Centres' still remains a useful and appropriate tool, 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.

Background

1.9 This Health Check updates key elements from the previous study published in December 2014, 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 2010, 2011, 2012, 2013, 2014 and 2015.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 Statistics (ONS), the Valuation Office Agency (VOA), Worcestershire County Council, retail specialist companies and also Bromsgrove's Authority 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 National planning guidance emphasises 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". The NPPG states that councils should assess and plan to meet the needs of main town centre uses in full, in broadly the same way as for their housing and economic needs, adopting a 'town centre first' approach and taking account of specific town centre policy. In doing so, councils need to be mindful of the different rates of development in town centres compared with out of centre.

1.12 Bromsgrove District Council is directed by national planning guidance to take full account of relevant market signals when planning for town centres and the Council should keep retail land allocations under regular review. These market signals should be identified and analysed in terms of their impacts on town centres. This information should be used to inform policies that are able to be responsive to changes in the market as well as the changing needs of business.

1.13 To take full account of market signals councils will need to monitor the health of their town centres and their changes over time. The NPPG identifies the following indicators are relevant in assessing the health of our town centres.

- diversity of uses;
- proportion of vacant street level property;
- commercial yields on non-domestic property
- customers' views and behaviour (new to the 2014 health check);
- retailer representation and intentions to change representation;
- commercial rents;
- pedestrian flows;
- accessibility;
- perception of safety and occurrence of crime; and
- state of town centre environmental quality.

1.14 Fortunately the above list of indicators is almost identical to the indicators prescribed by Planning Policy Statement 4 (PPS4) and its accompanying practice guidance. There are four notable changes, these include the introduction of:
1) Monitoring 'commercial yields on non-domestic property' and
2) 'Customers' views and behaviour
3) removal/absence of the 'amount of retail, leisure and offices in edge and out-of-centre locations'
4) 'the potential capacity for growth''; and the

1.15 This health check will continue to monitor the *amount of retail, leisure and offices in edge and out-of-centre locations'* and *'the potential capacity for growth'* as it provides continuity. Furthermore, the Council considers that these indicators provide added value to the Council's ability to assess the health of Bromsgrove Town Centre and support the 'town centres first' policy[1].

[1] NPPF Chapter two: Ensuring the vitality of town centres (paragraph 23 to 27)

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, South Staffordshire 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 90% 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 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 ordering 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, at a time when the retail sector is changing, perhaps fundamentally, particularly because of the growth of internet shopping.

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 2013 which forecasts the need for retail floor space in the District. The Council carries out housing and employment surveys annually, and reports on key indicators in the Authority's Monitoring Report.

UK Retail Sales in 2016[2]

2.13 Retail sales are an indicator of household consumption. A number of retail sales surveys are conducted, for instance by the CBI and the Office for National Statistics. The amount spent in the retail industry increased by 1.5% in May 2016 compared with August 2015, but decreased by 0.9% compared with May 2016. The value of online sales increased by 14.1% June 2016, compared with June 2015, and increased by 0.5% compared with May 2016.

2.14 The volume of retail sales in June 2016 is estimated to have increased by 4.3% compared with June 2015. Average store prices (including petrol stations) fell by 2.5% in June 2016 compared with June 2015. All store types saw falls in average store price compared with August 2015. In June 2016 compared with June 2015, all 4 main retail sectors saw an increase in the quantity bought (volume) and amount spent (value). The largest contribution in the quantity bought came from non-food stores, while the largest contribution in amount spent came from non-store retailing

[2] http://www.ons.gov.uk/businessindustryandtrade/retailindustry/bulletins/retailsales/june2016

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. The Townscape Heritage Initiative (THI) also assists in this regeneration.

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 (BDP17). It seeks 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.

2014 – 2016 Update

2.19 During the monitoring year significant improvements to the High Street were started. The High Street now benefits from new high quality granite paving along the full length of the High Street with distinct areas for market stalls and street cafes, new benches, trees and lighting. The market has now been relocated back into the High Street and businesses are now using the recently purchased market stalls. The first property to benefit from the Townscape Heritage Initiative was 27 – 29 High Street (former McDonalds restaurant) and was completed in early 2015.

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, 2013) in the West Midlands, 17.1% of the businesses are in wholesale and retail trade (down from 17.3% in 2012), 12.2% in professional, scientific and technical roles (up from 12.4% in 2012), 10.3% in construction (up from 10% in 2012), and 8.7% in health and education (no change from 2012). In Bromsgrove itself the business make-up consists of 12.2% of the businesses are in wholesale and retail (down from 12.7% in 2012), 15.8% in professional, scientific and technical roles (up from 15.6% in 2012), 12.8% in construction (down from 13.6% in 2012), and 7.9% in health and education (no change from 2012). There are more details on specific industries in table one.

Table 1: Local units in VAT and/or PAYE Based Enterprises by Industry, 2015 (%)

Industry	Bromsgrove	Worcs	West Midlands	UK
Agriculture, forestry & fishing	4.2	7.1	5.9	6.0
Production	5.7	7.6	7.8	5.8
Construction	12.8	10.5	10.0	11.6
Motor trades	4.0	3.6	3.5	2.9
Wholesale	5.0	5.6	5.5	4.3
Retail	8.2	10.1	11.6	7.9
Transport & storage	2.3	3.1	3.9	3.4
Accommodation and food services	5.1	5.6	5.9	6.0
Information & communication	6.6	5.3	5.0	7.9
Finance & insurance	2.6	2.2	2.2	2.0
Property	5.0	3.8	3.4	3.6
Professional, scientific & technical	15.8	13.9	12.4	17.8
Business administration & support services	8.1	7.2	6.8	7.9
Public administration & defence	0.5	0.9	1.2	0.3
Education	2.4	2.5	2.7	1.7
Health	5.5	4.9	6.0	4.3
Arts, entertainment, recreation & other services	6.3	6.2	6.2	6.8

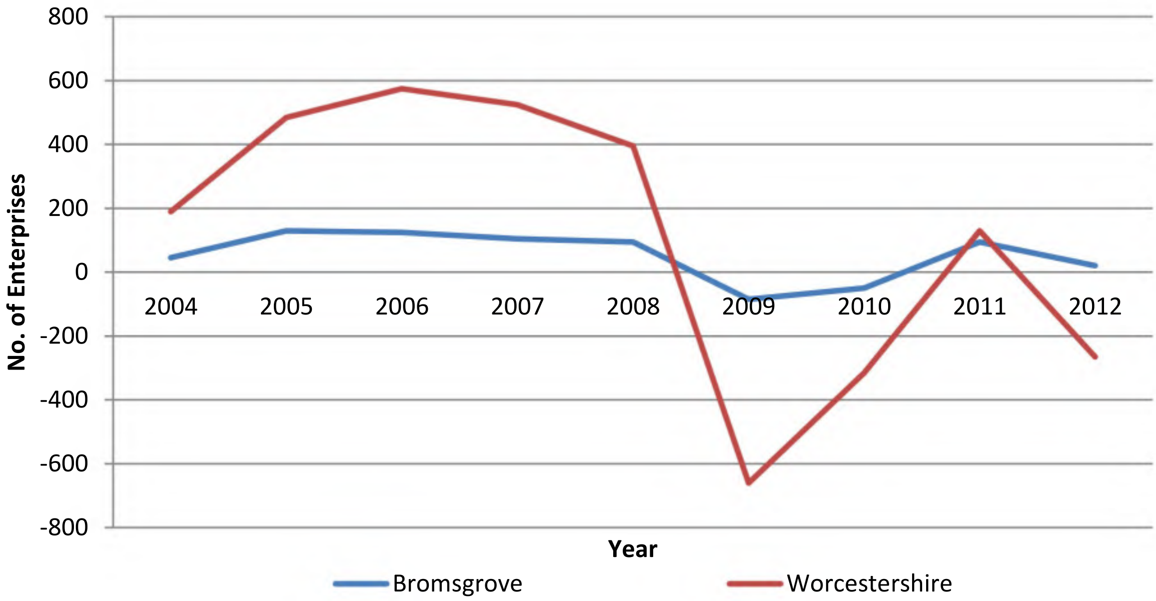
3.3 Business Size: There has been a noticeable drop in the number of people working for SMEs over the past year which have less than four employees at a regional and local level. However, the majority of businesses across the West Midlands have less than four employees, totalling to 67% (down from 75% in 2012) of all businesses in the region. Within Bromsgrove 72.3% (down from 78.1% in 2012) of businesses are made up of four or less employees.

3.4 Although a small proportion of West Midlands businesses 9.6% (up from 9.5% in 2012) have over twenty employees, they generally employ a large proportion of the workforce. The number of businesses employing over 100 employees has broadly remained the same as 2012 at 1.6%. Bromsgrove only has 7.1% (up from 6.9% in 2012) of its businesses employing over 20 people and also 1.0% (no change from 2012) with over 100 employees (ONS, 2013).

3.5 Enterprise Births and Deaths: 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.

3.6 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.

Figure 1: Births vs Deaths of Enterprise



Source: ONS Business Demography (2012)

3.7 In 2012, Bromsgrove District had slightly more (20) births than deaths. Across Worcestershire and the Region the trend is not as favourable. Records for Worcestershire and the West Midlands show significantly more deaths than births. Nationally and locally the count of active enterprises data shows post-recession economic growth is in a state of flux and it's still struggling to shake the effects of the recent recession.

3.7 Over the period 2004 to 2012, data shows the effects of the economic downturn, which began in 2008, started to take effect in 2009. Unsurprisingly the highest number of enterprise deaths during this period was 2009. Since the peak in 2009 the proportion of enterprise deaths has decreased consecutively in each year to, and including, 2011. Latest data however shows the number of enterprises closing has increased across the country with an increase of 10% when compared to 2011. This trend is also found in Worcestershire where it too saw an increase of 10% when compared to 2011. Bromsgrove recorded a higher increase in the number of deaths at 17% when compared to 2011.

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 2015, the overall unemployment level in Bromsgrove is 4.2%, compared with 5.8% regionally (West Midlands) and 5.2% nationally. This is less favourable to last year where the unemployment level in Bromsgrove was 3.9%, 7.5% regionally and 6.8% nationally.

Table 2: Employment and unemployment, April 2015 to March 2016

	Bromsgrove (%)	**West Midlands (%)**	**Great Britain (%)**
Economically Active	78.4	74.8	77.8
In employment	75.9	70.4	73.7
Un-employed	3.8	5.7	5.1

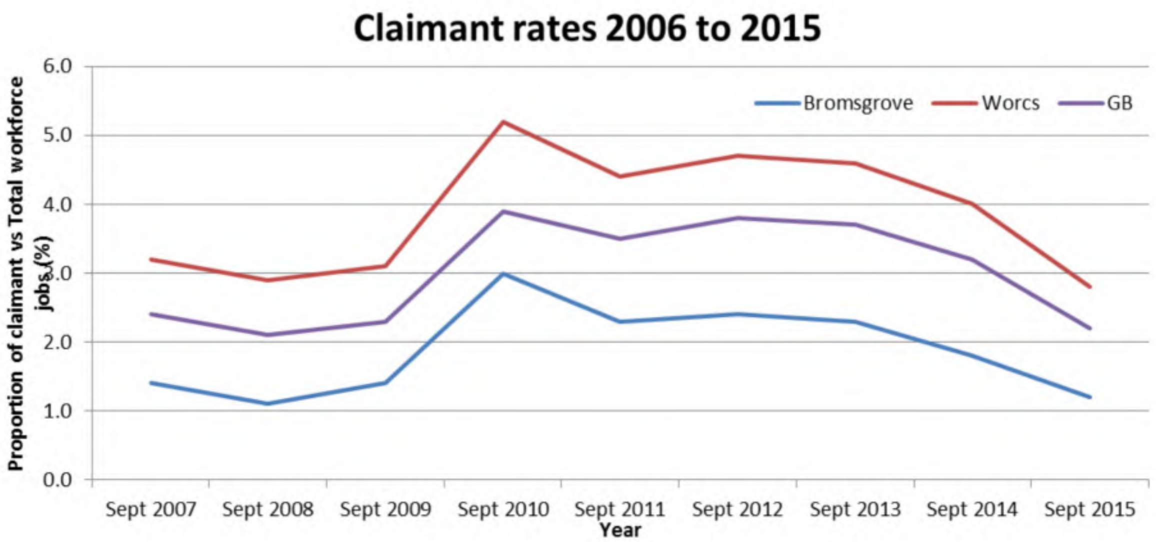
Source: Labour Market Profile (Nomis, 2015)

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. As per the past few years the trend shows there to be less people claiming JSA. In June 2016 there were 555 people (1% of the available workforce) being paid JSA. Improvements in the economy have been met with a decrease in the number of JSA claimants in Bromsgrove since 2009 from 740 which is a decrease of 165 since 2009.

Table 3: Total JSA Claimants (Nomis Labour Market Profile, June 2016)

	B'grove (numbers)	**B'grove (%)**	**Worcs (%)**	**West Mid (%)**	**GB (%)**
Males	345	1.2	1.6	2.8	**2.3**
Females	210	0.7	0.9	1.6	**1.3**
All people	**555**	**1.0**	**1.2**	**2.2**	**1.8**

Figure 2: Total JSA Claimant rates 2006 to 2015



Source: Labour Market Profile (Nomis, 2015)

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. During the period 2009 to 2013 Worcestershire GVA grew 10% from £8,445 million to £9,437 million[3]

3.13 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 or other qualifications when compared both regionally and nationally. There has been a significant increase in the number of people with an NVQ4 and above qualification from

[3] Worcestershire Local Enterprise Partnership Annual Report 2013-2014

33.3% in Jan 2012 to Dec 2012 to 39.2% in Jan 2015-Dec 2015. Future reports will need to consider this and whether it reveals other social trends, for example the number of 20 to 35 year olds returning to and choosing to live in Bromsgrove following graduation from colleges and universities.

Table 3: Qualifications (Jan 2015 - Dec 2015)						
	NVQ4 and above	NVQ3 and above	NVQ2 and above	NVQ1 and above	Other qualifications	No qualifications
Bromsgrove (numbers)	22,000	32,600	44,700	50,500	#	3,800
Bromsgrove (%)	39.4	58.5	80.1	90.5	#	6.8
Worcestershire (%)	37.4	56.7	73.7	84.7	5.2	10.1
West Midlands (%)	31.2	50.6	67.9	79.9	7.1	13.0
Great Britain (%)	37.1	57.4	73.6	84.9	6.5	8.6

Sample Size too small for reasonable estimate

Source: Nomis (2015)

3.15 Occupations: There is currently a similar percentage of the population in professional occupations (17.9%), compared with the region (17.9%). Whereas there is a lower percentage of people in Skilled Trade Occupations (6.9%). Over the past year there has been an increase in the number of managers and senior officials across Bromsgrove from 4,200 in 2015 to 5,200 in 2016. Data for associate professional and technical positions was recorded as 6,000 (13.2%) in the 2011/2012 period, this has since increased to 6,200 (13.5%) in 2016.

Table 4: Employment by occupation (April 2015 – March 2016)					
	Bromsgrove (numbers)	**Bromsgrove (%)**	**Worcs (%)**	**West Midlands (%)**	**Great Britain (%)**
Managers and senior officials	5,200	11.3	11.8	9.7	10.4
Professional occupations	8,200	17.9	18.6	17.9	19.8
Associate professional & technical	6,800	13.5	13.6	12.6	14.1
Administrative & secretarial	6,200	14.9	10.5	10.7	10.6
Skilled trades occupations	3,200	6.9	11.2	11.5	10.5
Caring,	3,500	7.6	9.6	9.4	9.2

Table 4: Employment by occupation (April 2015 – March 2016)					
	Bromsgrove (numbers)	**Bromsgrove (%)**	**Worcs (%)**	**West Midlands (%)**	**Great Britain (%)**
leisure and other service occupations					
Sales and customer service occupations	#	#	6.6	7.3	7.6
Process plant & machine operatives	3,300	7.2	7.7	7.8	6.4
Elementary occupations	8,400	18.4	10.2	12.5	10.8

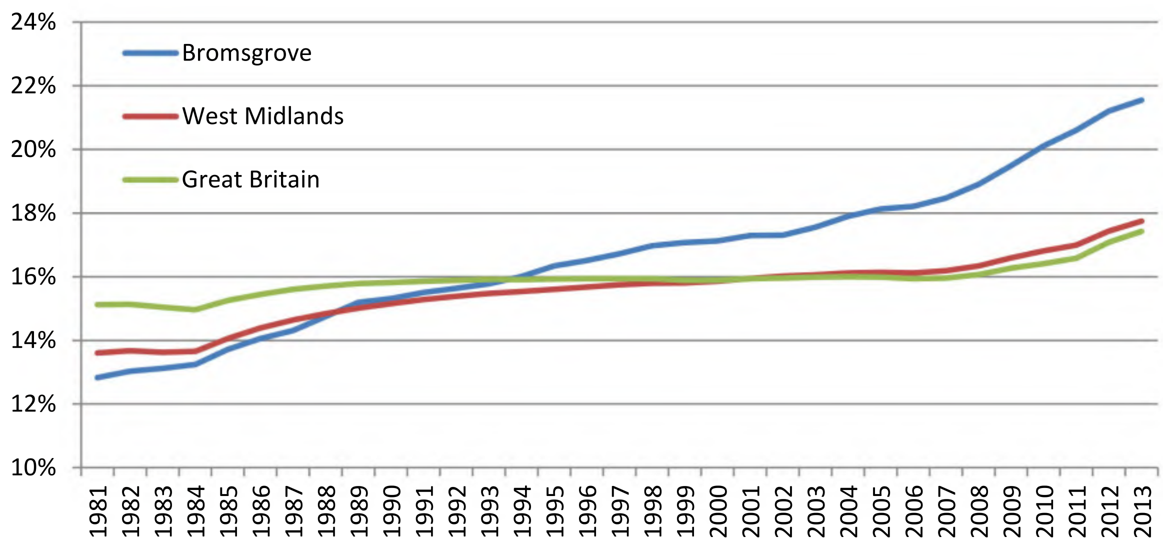
sample size too small for reasonable estimates

Source: Nomis (2016)

3.16 Population: The 2011 Census showed that Bromsgrove District has a resident population of 93,637, there has been an increase to 95,500 in 2015 (Nomis 2015). 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 people aged 65-plus is projected to increase by around 11,300 and continues a trend (figure 3) that has been in place since the early 1980's. Since 2008 this trend has increased at a much more rapid rate albeit this appears to be occurring uniformly across the West Midlands and Great Britain and is likely to be a direct result of the baby boomer generation starting to enter retirement.

Figure 3: Proportion of total population aged 65 & over



Source: Nomis Labour Market Profile, 2014

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. The effects of the recession are starting to fade as house prices have jumped by 6.7% on the previous year. This is significantly higher than the 0% change recorded last year, the -0.1% change in 2012, the -2.3% change in 2011 and the -13.6% change in 2010. House prices are still relatively high compared to the rest of the Worcestershire. In July 2016, the average house price across Bromsgrove was £281,806 compared with £201,130 in neighbouring Redditch, as well as the Worcestershire average of £237.912 (Worcestershire County Council District Profiles 2015). Of particular note is the -10.7% change in flats and maisonettes in the District. This figure should be monitored as this is a significant departure from other dwelling types as well as neighbouring authorities. The annual housing land availability study does not identify a high level of flats being completed which might depress the price of flats. One possible factor might be the availability of finance, for example the price of flats are still continuing to fall as first time buyers are struggling to raise sufficient capital and secure mortgages to purchase flats.

Table 5: Average House Prices in Worcestershire

Authority	Detached	Semi Detached	Terraced	Flat / Maisonette	Total Averages		
	Q3 2014/15 % Change				Q3 2014	Q3 2015	Q3 14/15 % change
Bromsgrove	13.6	-1.8	2.3	-10.7	£258,712	£281,806	8.9
Malvern Hills	-1.6	-2.7	7.7	6.0	£273,938	£267,385	-2.4
Redditch	6.9	4.8	11.8	-20.2	£179,063	£201,130	12.3
Worcester	9.2	9.1	2.4	-15.8	£190,651	£205,896	8.0
Wychavon	2.7	1.7	8.5	-7.2	£254,958	£273,494	7.3
Wyre Forest	3.5	-1.1	8.7	-1.2	£176,759	£188,405	6.6
Worcs	**4.6**	**1.2**	**6.1**	**-9.2**	**£222,889**	**£237,912**	**6.7**

Note: figures in italics and underlined are based on fewer than 20 sales and should be treated with caution.
Source: Worcestershire County Economic Survey, July 2016 (via Land Registry, 2015)

3.19 The number of affordable housing completions has increased since last year (166 compared with 12). This is considerably higher than those achieved in 2015 and due to three large housing developments that are currently under construction and include affordable housing schemes. 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 (moratorium) was lifted in January 2010.

3.21 Housing Requirements: 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. The outcomes of the inspector’s report for the District Plan are currently awaited.

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). The Government has recently announced they intend to publish an update to the Indices in Summer 2015.

3.23 Earnings: household incomes in Worcestershire are higher than they are elsewhere in the West Midlands and England. Household incomes are highest in Bromsgrove (£32,917 pa) and lowest in Wyre Forest (£26,308 pa). Household income includes income from employment (earnings) as well as that from other sources, for example investments and savings. Unsurprisingly household income is still declining in 2012 with Bromsgrove experiencing a 4.6% drop in median household incomes which is more than that experienced across the West Midlands and England but in line with the Worcestershire average. A reduction in median household income will obviously have a direct impact on the local consumer's ability to purchase convenience and comparison goods.

Table 6: Household Income

Area	**Median Income (£) per year**		
	2011	**2012**	**% change 2011/12**
Bromsgrove	£34,492	£32,917	-4.6%
Malvern Hills	£30,218	£28,752	-4.9%
Redditch	£30,291	£29,283	-3.3%
Worcester	£29,115	£28,194	-3.2%
Wychavon	£31,675	£29,601	-6.5%
Wyre Forest	£27,821	£26,308	-5.4%
Worcestershire	£30,515	£29,063	-4.8%
West Midlands	£27,068	£26,111	-3.5%
England	£29,464	£28,360	-3.7%

Source: Worcestershire County Council (via CACI Ltd., Paycheck (2012)

3.24 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 £22,119 (down from £22,349 in 2012) compared with the average annual earnings for residents of Bromsgrove

District, which is £32,027 (up from £29,423), a difference of 31% (ONS, 2013). The District's population earn higher salaries than the County average, however 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).

Table 7: Annual Gross Median Full-Time Earnings by District (2013)

District	Residence based earnings	Workplace based earnings	% Difference
Bromsgrove	£32,027	£22,119	30.94
Malvern Hills	£27,899	£25,856	7.32
Redditch	£22,791	£23,253	-2.03
Worcester City	£26,459	£24,817	6.21
Wychavon	£25,000	£24,154	3.38
Wyre Forest	£23,088	£18,897	18.15
Worcestershire	£25,980	£23,145	10.91
West Midlands	£25,359	£25,341	0.07
England	£27,375	£27,376	0.00

Source: Annual Survey of Hours and Earnings 2013 (Provisional Results) (ONS, 2013)

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; and
- 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 the NPPG 'Ensuring the vitality of town centres' chapter emphasises the need for local planning authorities to gain a proper understanding of the health of the town centres in their area. As previously explained in paragraphs 1.15 and 1.16 the NPPG has introduced two new indicators and removed two indicators. For the reasons of continuity this study will continue to monitor the indicators prescribed in PPS4 and its accompanying guidance within the inclusion of the two new indicators. It is believed this will not be onerous however future studies might wish to reflect on this issue. Indicators can be found at paragraph 1.15.

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, 2012, 2013, 2014 and 2015. 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 five 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:

- It is in accordance with NPPG 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.

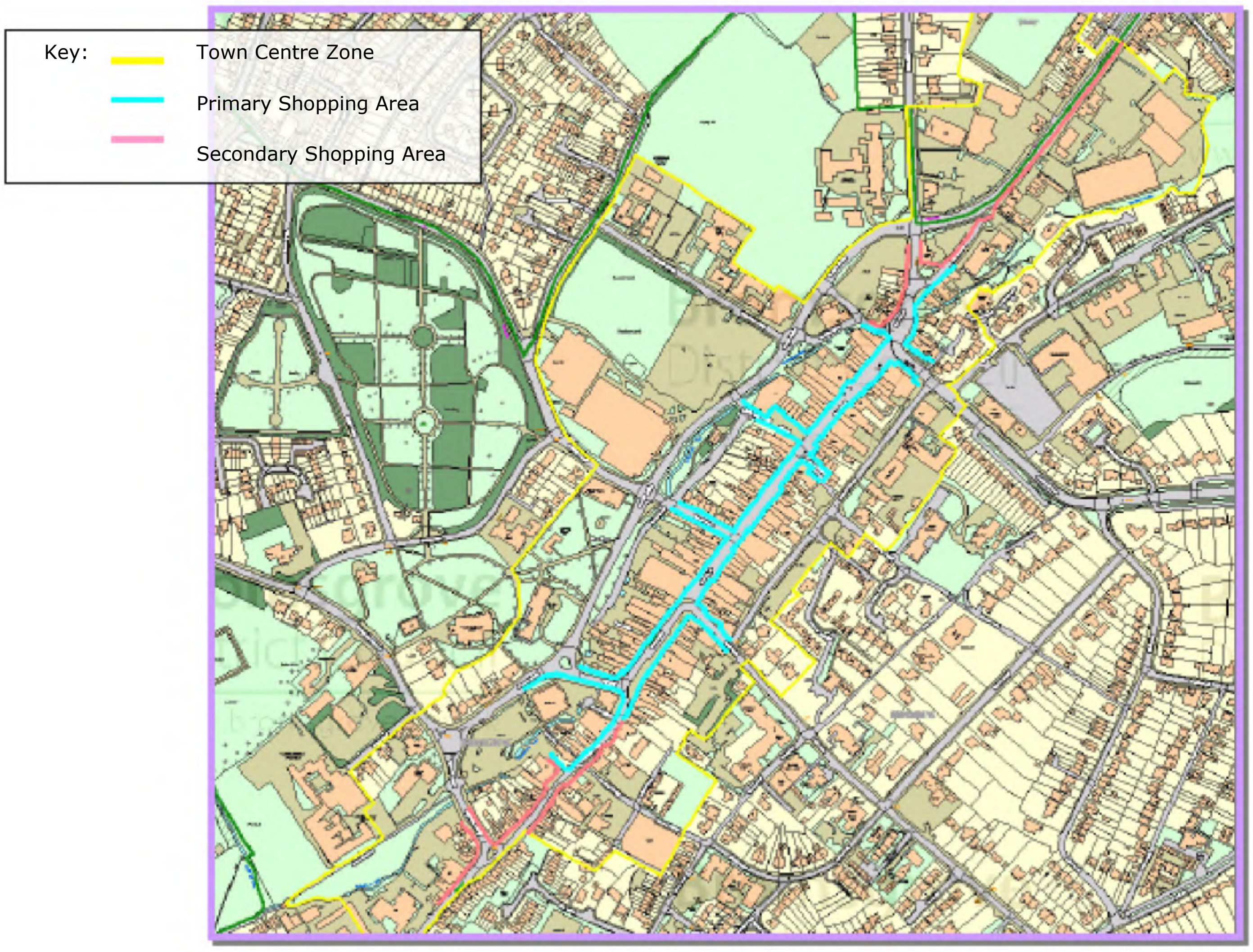
4.6 Town centres are constantly changing and therefore elements of this document will only provide a snap shot in time, for example, the ground floor survey and pedestrian count. However, as the Health Check is updated comparisons can be made with previous years. There are also a number of other benefits 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 is also reflected in the emerging District Plan, however until adopted this area will remain consistent with the Local Plan.

Figure 4: Town Centre Boundaries



Diversity of Main Town Centre Uses

4.8 The use of all ground floor properties across Bromsgrove Town Centre was recorded in relation to this indicator. There were 345 units surveyed in the Centre at the time of the 2015/16 survey. The previous surveys have indicated 347 units across the town centre, but after checking there are a couple of units that have been double counted. This however, shouldn't affect the previous figures, as the units double counted were mostly vacant units at the time of the survey. 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).

Figure 5: Town Centres Uses in January 2016- North

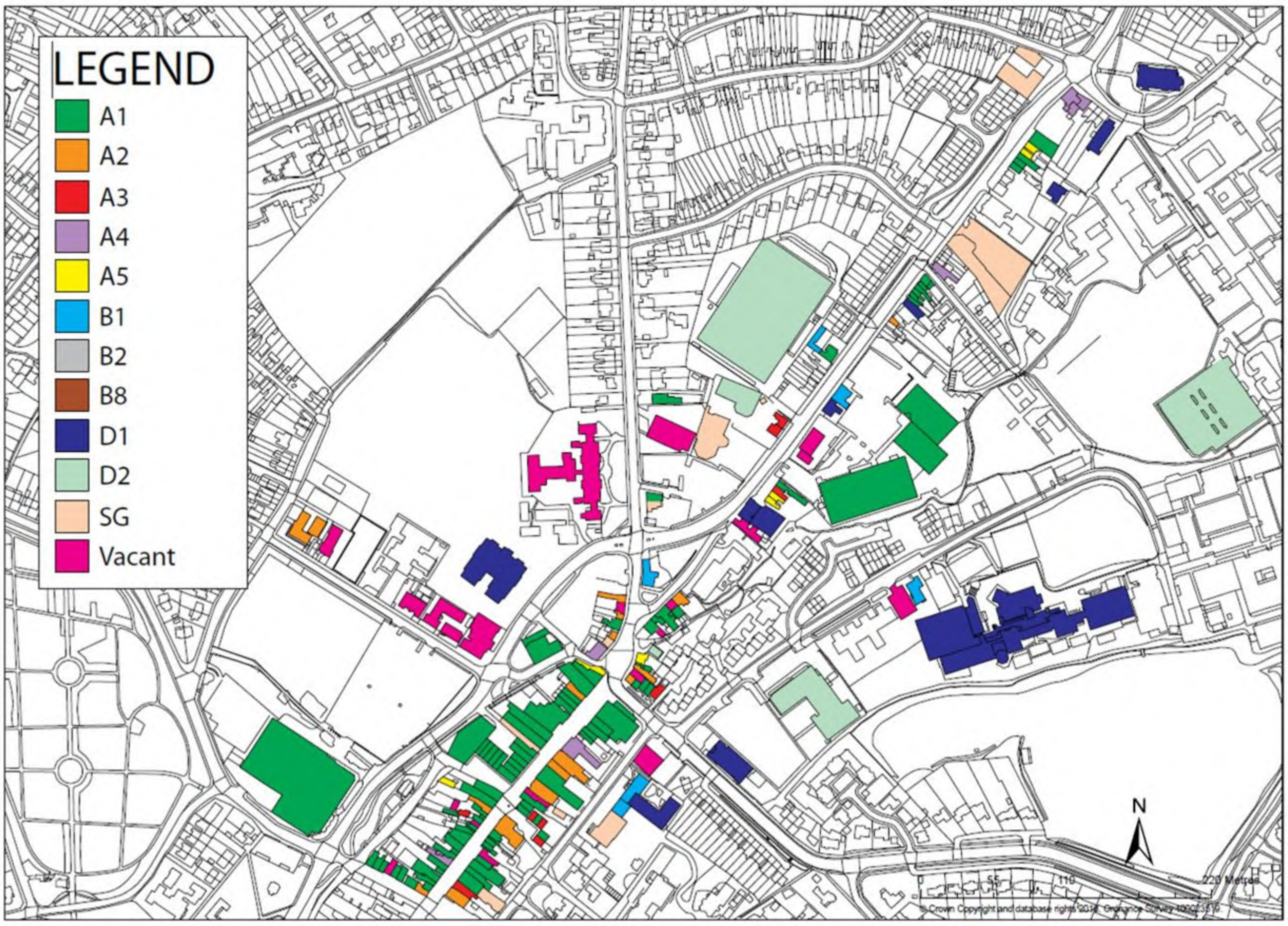


Figure 6: Town Centre Uses in January 2016 – South

Table 8: Individual Use Classes across Bromsgrove Town Centre

Use Class	Primary	%	Secondary	%	Other	%	Total	%
A1	101	*59%*	21	*28%*	25	*25%*	**147**	***43%***
A2	26	*15%*	17	*22%*	11	*11%*	**54**	***16%***
A3	15	*9%*	4	*5%*	3	*3%*	**22**	***6%***
A4	4	*2%*	4	*5%*	3	*3%*	**11**	***3%***
A5	5	*3%*	13	*17%*	2	*2%*	**20**	***6%***
B1	1	*1%*	4	*5%*	7	*7%*	**12**	***3%***
B2	1	*1%*	0	*0%*	0	*0%*	**1**	***1%***
B8	0	*0%*	0	*0%*	1	*1%*	**1**	***1%***
D1	1	*1%*	4	*5%*	14	*14%*	**19**	***5%***
D2	0	*1%*	0	*0%*	3	*3%*	**3**	***0.8%***
SG	1	*1%*	4	*5%*	13	*13%*	**18**	***5%***
Vacant	16	*9%*	5	*6%*	16	*16%*	**37**	***11%***
Total	**171**	***100%***	**76**	***100%***	**98**	***100%***	**345**	***100%***

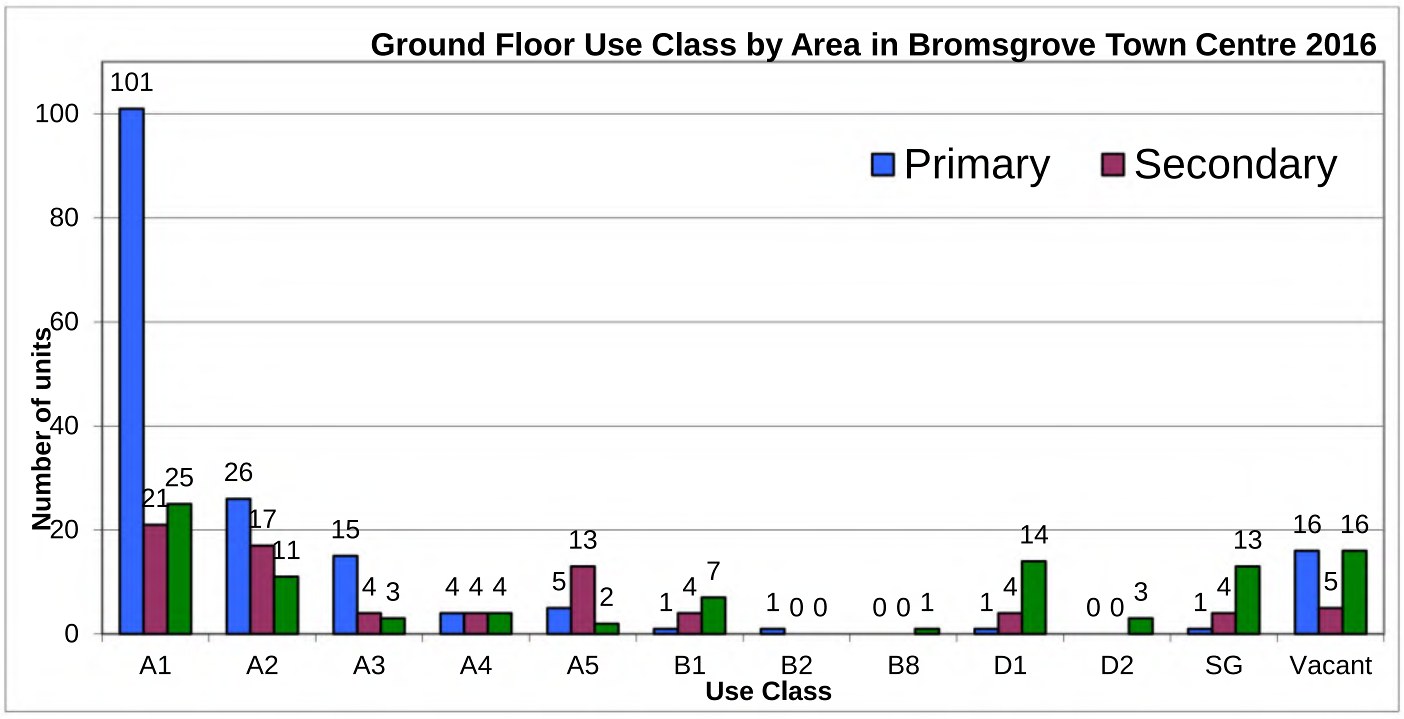
4.9 Among the 345 businesses / vacant units, just under half of the shops are for retail A1 use (43% / 147 units), followed by A2 financial and professional offices use (14% / 54 units) and vacant shops (12% / 37 units). The rest are made up of uses with a considerably smaller number of units: A3 restaurants and cafes (7% / 22 units), sui generis (5% / 18 units), D1 non-residential institutions (5% / 19 units), B1 business use (5% / 12 units), A5 hot food takeaways (5% / 20 units), A4 drinking establishments (3% / 11 units), D2 amenity and leisure use (1% / 3 units), B2 general industry (0.3% / 1 unit) and B8 storage or distribution (0.3% / 1 unit). This information is illustrated in figure 4, indicating the uses in the town centre in terms of which area of the town they are situated.

Table 9: Individual Use Classes across Bromsgrove Town Centre (ranked)

Use Class	Primary	%	Secondary	%	Other	%	Total	Total %
A1	101	*59%*	21	*28%*	25	*25%*	**147**	***43%***
A2	26	*15%*	17	*22%*	11	*11%*	**54**	***16%***
Vacant	16	*9%*	5	*6%*	16	*16%*	**37**	***11%***
A5	5	*3%*	13	*17%*	2	*2%*	**20**	***6%***
SG	1	*1%*	4	*5%*	13	*13%*	**18**	***5%***
A3	15	*9%*	4	*5%*	3	*3%*	**22**	***6%***
D1	1	*1%*	4	*5%*	14	*14%*	**19**	***5%***
B1	1	*1%*	4	*5%*	7	*7%*	**12**	***3%***
A4	4	*2%*	4	*5%*	3	*3%*	**11**	***3%***
D2	0	*0.0%*	0	*0%*	3	*3%*	**3**	***0.8%***
B2	1	*0.6%*	0	*0%*	0	*0%*	**1**	***1%***
B8	0	*0.0%*	0	*0%*	1	*1%*	**1**	***1%***

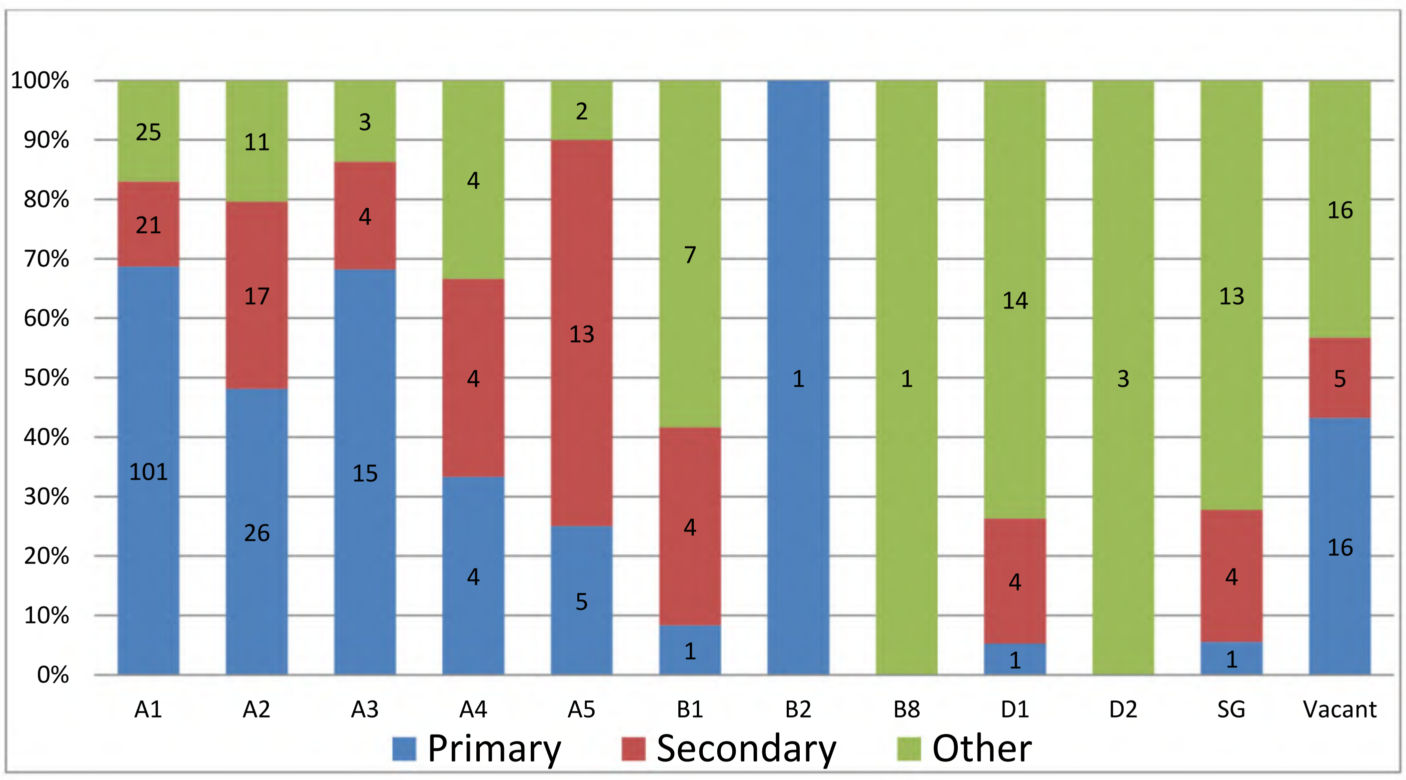
4.10 The 2016 figures have remained fairly consistent with the 2015 ground floor use class survey. The number of retail units (A1) has increased across the town centre by six units, with the largest increase being in the Primary Shopping Zone. The number of vacant units has decreased since 2009. There has been a decrease from 42 to 35 units (down from 38 in 2012), representing 12.1% of all units.

Figure 7: Ground Floor Use Class by Area in Bromsgrove Town Centre 2016



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

Figure 8: Ground Floor Use Class Distribution in the Town Centre 2016



4.12 The graph below (Figure 9) shows how the number of vacant units has changed from 2009. The vacancy rate has decreased year on year until 2013 where there has been a consecutive increase in 2013 and 2014 albeit vacancy rates are still lower than 2009. The reduction reflected positively in terms of town centre regeneration, however, the increase in 2013 and 2014 should be monitored in future Health Checks.

Figure 9: Vacant Units 2009 to 2015/16

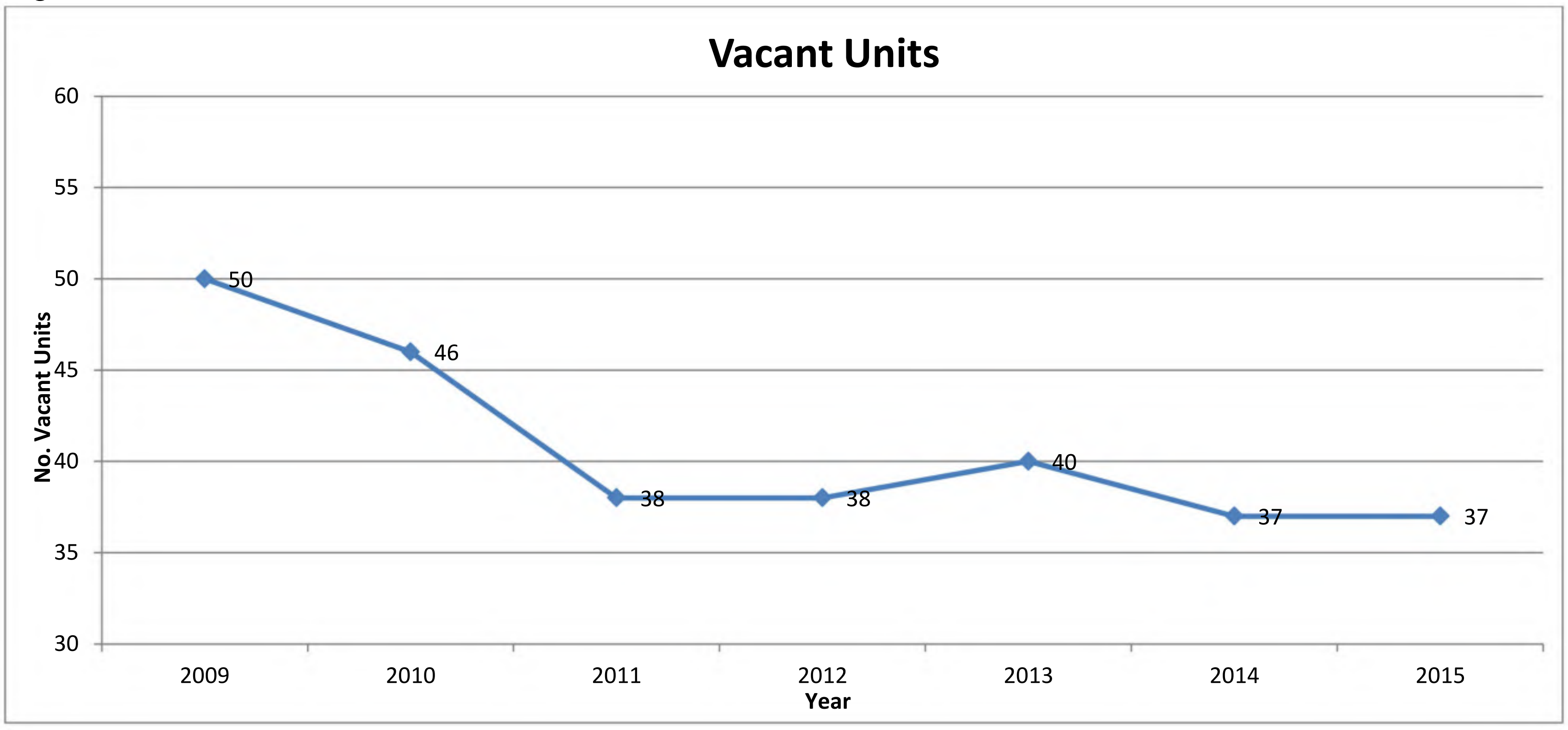


Table 10: General Uses across Bromsgrove Town Centre

Shopping Areas	A	B	D	SG	Vacant	Total
Primary	**151**	**2**	**1**	**1**	**16**	**171**
	88.3%	*1.2%*	*0.6%*	*0.6%*	*9.4%*	*100%*
Secondary	**44**	**4**	**4**	**4**	**5**	**61**
	72.1%	*6.6%*	*6.6%*	*6.2%*	*8.2%*	*100%*
Other	**44**	**8**	**17**	**13**	**16**	**98**
	44.9%	*8.2%*	*17.3%*	*13.3%*	*16.3%*	*100%*
Total	**239**	**14**	**22**	**18**	**37**	**330**
	72.4%	*4.2%*	*6.7%*	*5.5%*	*12.2%*	*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 2015/6 survey highlights that within the primary shopping area, 88.3% of its units fall within 'A' use classes (up from 85.4% in 2014). 59% of all A1 uses (including charity shops) in the town centre locate in this area (101 out of 171 units), this is followed by 15% (26 out of 171 units) are A2 professional and financial services and 9% (15 out of 171 units) are A3 food and drink. 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 one 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. There are 16 (down by six since 2014) vacant units (9% of the total vacant units) recorded in the primary shopping area.

4.16 The Secondary Shopping Area (SSA) provides greater opportunity for a diversity of uses as demonstrated by the greater proportion of non 'A' uses. 72% of all units fall within use class 'A' (down one percentage point since 2014). A1 use accounts for 28% (21 units), A2 use 22% (17 units), A3 use 5% (4 units), A4 use 6% (4 units) and A5 use 15.4% (10 units). 6.2% (4 units) are used as B1 offices, 5% (4 units) are D1 use and 5% (4 units) are Sui Generis. There were a total of five vacant units recorded in the secondary area, making up 7% of the total units in the SSA. This is a reduction of one vacant unit from 2014, one in 2013 and two in 2012; looking further back it appears the SSA is demonstrating a good level of resilience and vitality as vacancies have more than halved (from 12 to 5 units) since records began in 2009.

4.17 For areas outside the primary and secondary shopping areas, 45% of the units fall within use class 'A'. The rest of the units fall within use class B (8.2%), use class D (17%) and other uses (29%). There were a total of 16 vacant units (16% of the total units). The number of vacant units increased by two since 2014; however this is still significantly below the 23 vacant units recorded in 2010.

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 101 units, equivalent to 59%. The PSA is also where the majority of A2 (48%) and A3 (27%) uses are located. A4 units are similar across all areas with only a difference of one unit between the PSA and the SSA'. The majority of A5 uses (65%) are located in the SSA, compared with 25% in the PSA and 10% in the 'other' areas. The overwhelming majority of B1 offices (58%) are in the 'other' areas. This location is also where the most B8 (100%), D1 (73%), D2 (100%) and Sui Generis (72%) uses are located.

4.19 The NPPG does not provide the same level of detailed support that was once found in the 'Planning for Centres' guidance paper. Whilst the NPPG supersedes this guidance paper the previous guidance still remains relevant and useful to town centre vitality and viability. The guidance paper helpfully stated 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. Within this context, 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 Bromsgrove 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 and closely monitored. The town centre policy within the Bromsgrove District Plan in particular will look to address vacancy rates. The vacant Market Hall site now has planning permission for a Waitrose supermarket. Development for a retirement village on Recreation Road is under construction and Bromsgrove District Council are now located at Parkside Middle School in the town centre which also houses the relocated library, registry office and the Job centre and forms an accessible 'hub' for customer service close to the Town centre..

Mix of Uses

4.21 A Goad Category Report was obtained for 2013 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 are 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.

Table 11: Units by Sector in Bromsgrove

	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**
Total	**256**	**100**	

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

Table 12: Floorspace (sq. ft.) by Sector in Bromsgrove

	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**
Total	**544,900**	**100**	

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 three 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 proximately 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 Bromsgrove District Plan proposes 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, four 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 (five 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 Bromsgrove District Plan allocates a number of development sites across the town centre to help bring about its regeneration.

Retail

4.34 New retail accommodation will be provided to expand the variety on offer of the Town Centre. The Bromsgrove District Plan involves concentrating commercial and retail development around the High Street and other areas of the Primary Shopping Area. 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. Furthermore the relocation of the fire and police stations from the town centre to a new dual purpose built building on School Drive will free up space for other appropriate town centre uses.

4.35 It is hoped existing retail sites such as the Birmingham Road Retail Park will offer improved shopping opportunities. This is in addition to other sites proposed as part of Bromsgrove District Plan. The former Market Hall site has planning permission for a Waitrose, 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 the new Council House at the former Parkside school site allows 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.

4.39 There is currently a planning application for the Birmingham Road / Stourbridge Road Junction for a supermarket. 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. Further housing will add to the vibrancy of the Town Centre and could make it a safer place and decrease fear of crime for example, in the evening by increasing chances of natural surveillance when the offices and retail outlets close.

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. 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, with the Dolphin Centre where planning permission has been granted for a new leisure centre.

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 Waitrose 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 and Clintons are represented. During 2014 Phones 4 U went in to administration and is no longer trading.

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 retail development was passed in 2010 on the current site of Co-Op, YMCA and Focus (now What!) 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, HSBC, 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 Bromsgrove 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 The Local Data Company find that the North/South divide evidenced in previous reports is still clear with Southern centres seeing a vacancy rates improve by around 9% whilst centres in the North and Midlands have seen just a 3% improvement. The North West continues to be the worst region for all (retail & leisure) vacancy at 16.9% but has shown improvement of 0.4% whilst the North East is the only region to have shown a decline in its fortunes with an increase in vacancy rate by 0.4% to 16.4%. Of the top 10 worst town centres for vacant retail and leisure premises, all of whom are above 23%, 6 are in the North East or North West. Conversely, of the top 10 best performing town centres with the least vacant units, 7 are in Greater London and the South East.

4.53 Regional analysis shows improvement in all regions with the exception of the North East ((+0.4%). In order of improvement they are – South West (-1.7%), South East (-1.3%) East Midlands (-0.8%), Yorkshire & The Humber (-0.8%) London (-0.5%), East of England (+0.5%) West Midlands (-0.4%) and the North West (+0.4%). The North West's vacancy rate of 16.9% is still more than double that of London which is 7.8%.

4.54 Small towns (<200 units) are in the healthiest state at 8.9%, which is a 0.1% improvement on the end of 2013. Medium towns (200-400 units) have also shown a decrease in their vacancy average by 0.2% to 11.7% and large towns/cities continue to have the highest overall 'town' vacancy rate at 12.9% but have also shown the greatest improvement at -0.6%. Overall Retail Parks lead the pack at 8.9%, which is an improvement of 1.5% on the same period last year and Shopping Centres continue to have the highest vacancy rate average at 15.3% which is an improvement of -0.8% on 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 Colliers' Midsummer Retail Report reveals Birmingham is outperforming other UK centres. Colliers International find that although Birmingham's retail sector is 'coming up for air' after an extended period of negative growth, comparing the West Midlands' rental growth figures (-2.3 per cent) to the national figures paints a less optimistic picture; the latest report reveals that the West Midlands is experiencing its seventh consecutive year of decline and is ranked the third worst performing region in the UK, following the South West at -3.1 per cent and Wales, which recorded the worst rental decline of -9.1 per cent.

4.60 When the region's statistics are analysed in isolation however, the reported retail rental decline of 2.3 per cent in 2014 indicates an improving picture for the region; rents are up almost three per cent versus 2013 and up almost nine per cent since they hit their lowest level of 11.1 per cent in 2009. More promisingly, the West Midlands' 2014 figures are edging closer to pre-recession levels (-1.2 per cent recorded in 2008), reflecting the nation's wider improved economic performance and reversing years of deepening decline during the prolonged downturn.

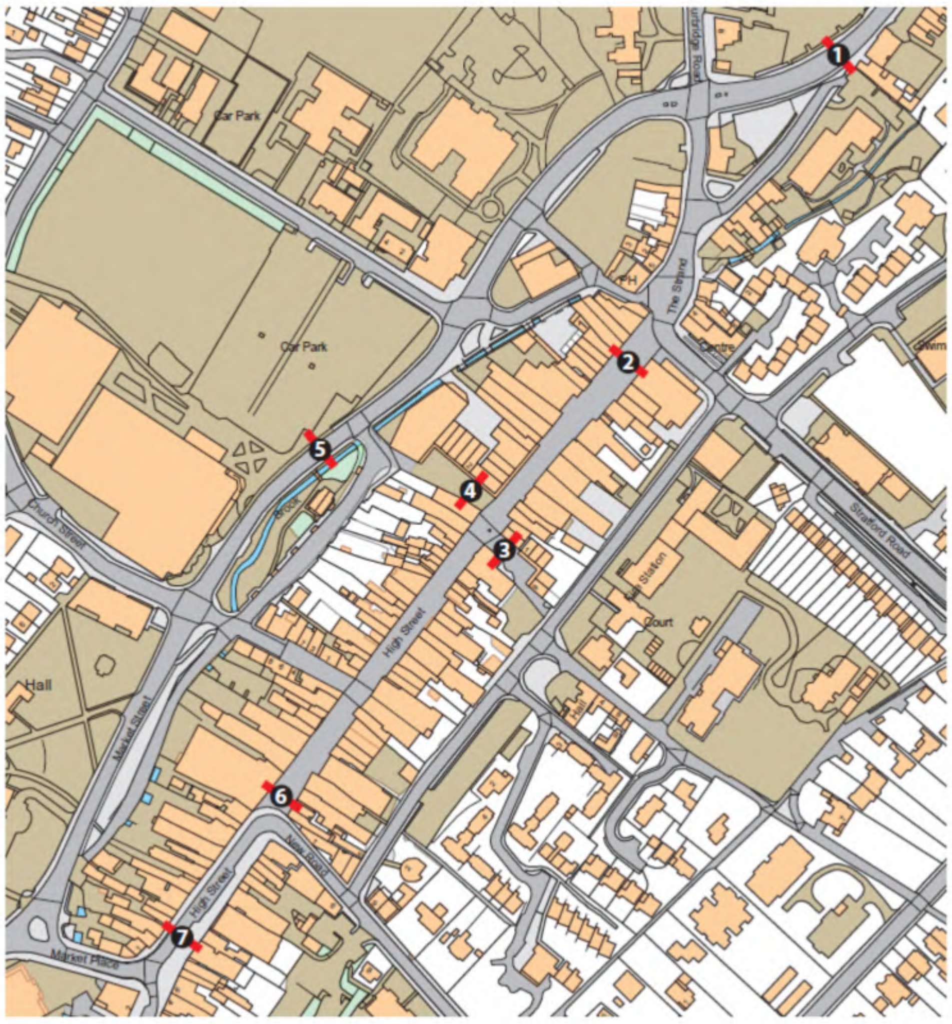
4.61 However, a comparison of 2014 retail rental levels with those at the start of the longest post-war recession in 2008, show that average rents in the West Midlands remain 26 percent below pre-recession levels, at £84.1 per sq ft compared with £114.4 per sq ft in 2008.

4.62 The worst performing centres in the West Midlands are Tamworth in Staffordshire and Kidderminster in Worcestershire, retail rents in these centres dropped by 27.3 per cent to £40 per sq ft between 2013 and 2014. Other centres that performed badly include Evesham in Worcestershire, which suffered a decline of 13 per cent to £35 per sq ft, and Cannock in Staffordshire that experienced a 10 per cent drop to £45 per sq ft. David Fox, Head of Retail Agency, Colliers International commented: "*Despite the West Midlands ranking as the third worst performing region in the UK, this year marks the first signs of recovery, a trend that is being mirrored across the country. Despite this, Birmingham's retail centre rental growth is double the national average at four per cent, making it the best performing area in the region and in the top 10% nationwide.*"

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 data on commercial yields has been difficult to obtain as part of this year's Health Check. Future reports might benefit from purchasing specific data from specialist retail companies.

Pedestrian Flows (Footfall)
Figure 10 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. In 2013 the pedestrian count changed to include more locations and also more appropriate locations in order to obtain a more rounded picture of footfall within the town centre. The new location points 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. 7).

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 the former Pizza Hut. The northern location was added to show the amount of people entering the town from the car park located at Co-Op. Furthermore 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 three, 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 two and three (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.

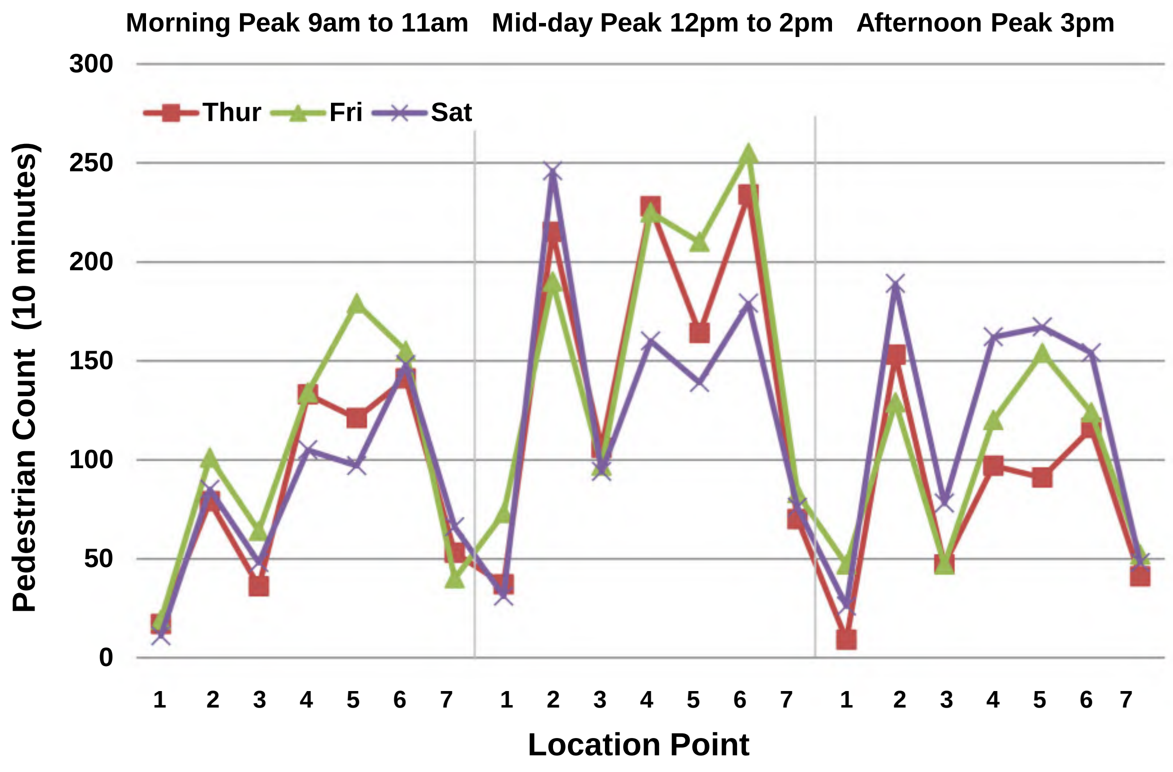
4.70 To the south of the High Street are the New Road and Hanover Street car parks. They provide 194 spaces and 13 spaces for the disabled. Visitors parking here are likely to enter/ leave the town at the bottom of the High Street and pass by counting points 6 and 7.

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 disabled spaces. 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, 2013, 2014 and 2015.

4.73 The graph (Fig. 8) below highlights the Pedestrian footfall during the 2015/16 survey, which can be compared with the information in appendix D for the 2009, 2010, 2011, 2012, 2013 and 2015/16 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.

Figure 11: Bromsgrove Town Centre Pedestrian Footfall 2015/16



4.74 Each year from 2009 to 2012 (as well as 2014 and 2015), the pedestrian flow has been surveyed on a non-market weekday, a market weekday, and a Saturday market day (which was also the Saturday farmers market in 2009, 2010, 2011 and 2013). 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. The 2015/16 study was conducted in December 2015 and January 2016, but in order to maintain comprehensive data all subsequent counts will be conducted in July. Results were collected at seven location points so comparisons can be made year on year.

4.75 This monitoring year represents the first year that all seven locations can be compared with the previous year. Prior to 2013 only three locations can be directly compared[4]. The table below shows the differences between the 2014 and 2015/16 surveys at these locations.

[4] NB: 'old' numbered locations 1, 4 and 5 found in pre 2013 editions are now referred to as locations 2, 5, and 6.

Table 13: Footfall Comparisons 2014-2015/16

Location	Year	Non-Market Day	Market Day	Farmers Market Day	Total	% Change on previous year
1	2014	63	139	68	**270**	-3
	2015	47	79	125	**251**	
2	2014	447	420	520	**1387**	-5
	2015	435	439	386	**1260**	
3	2014	189	208	220	**617**	-1
	2015	200	97	310	**607**	
4	2014	458	479	427	**1364**	-17
	2015	458	328	199	**985**	
5	2014	376	543	403	**1322**	-15
	2015	345	390	241	**976**	
6	2014	491	534	481	**1506**	-13
	2015	453	399	328	**1180**	
7	2014	164	175	190	**730**	-13
	2015	180	177	206	**563**	
Total	**2014**	**2188**	**2498**	**2309**	**6995**	
	2015	**2118**	**1909**	**1795**	**5822**	

4.76 Table 13 shows there has been a decrease in the number of pedestrians across all location points compared with 2014. This is probably due to the survey's being conducted in November and January rather than July and August.

4.77 During 2014 the percentage difference of footfall in the town centre between a market weekday (2,498) and a non-market weekday (2,188) was 4%. The trend was still evident in 2015/16, only recording a 5% difference between a market weekday (1,909) and non-market weekday (2,118).

4.78 The 2014 and the 2015/16 surveys show that the busiest location over the three days was location point 6 with a total of 1,506 and pedestrians in 2014 and 2015 respectively. This point was also the busiest in 2010. The busiest point in 2011 was location 5 (Asda crossing) and in 2012 in 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. The continued draw of this store could help explain the enduring high levels of footfall experienced at this location since 2010. There are also three car parks in close proximity to this location point allowing good access to the Town Centre.

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 the years pass by this information will be more apparent. In previous years the trend showed the town centre was getting busier and in particular on Saturday's that coincided with the Farmers Market. Unfortunately this monitoring year the trend has arrested and it appears largely because of the resurfacing of the high street, the absence of the Saturday Market and poor weather.

Table 14 Footfall Percentage Change 2014 – 2015/16

Location		Non-market Day	Market Day	Famers Market Day
MORNING COUNT	1	1%	-23%	3%
	2	-20%	-10%	-24%
	3	31%	-17%	-32%
	4	0%	12%	-48%
	5	0%	9%	0%
	6	-34%	-12%	36%
	7	-17%	2%	-17%
MIDDAY COUNT	1	0%	-27%	16%
	2	0%	8%	-34%
	3	0%	-63%	39%
	4	0%	-7%	2%
	5	-2%	-15%	32%
	6	34%	10%	-38%
	7	1%	-25%	0%
AFTERNOON COUNT	1	22%	-49%	-15%
	2	22%	-3%	-60%
	3	7%	-33%	45%
	4	35%	-40%	-42%
	5	17%	3%	0%
	6	5%	-42%	12%
	7	0%	2%	24%

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 considered 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 was opened in 2016. The project involved replacing the old railway station with a new station that was built on the former goods yard, just to the south of the old railway station. The County Council worked in partnership with Network Rail, London Midland, Centro and Bromsgrove District Council in the relocation of Bromsgrove Station. However, the project is not yet completed. Phase two of the project is set to see the electrification of the line from Bromsgrove to Barnt Green by 2017. 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 by October 2016.

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 Sustrans 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.[5] 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 is open 24 hours a day. 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.

[5] Some cycling parking was unavailable during count due to the resurfacing of the High Street

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 one mile from junction one of the M42, three and four miles from junctions 4 and 5 of M5, respectively. There are nine pay and display car parks and two 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.

Table 15: Car Ownership 2011

	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 have mobility problems (whether through disability, illness or injury) to continue to get around the town centre independently, with freedom, confidence and dignity. It is located on the ground floor of the multi storey car park adjacent to Asda. 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 highlights 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 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 relation 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 West Mercia Police provide[6] a breakdown of crime into fourteen categories for each neighbourhood area. Table 16 shows the number of crimes that have been reported in the town centre (St Johns) neighbourhood during the period October 2013 to September 2014. Anti-social behaviour, violence and sexual offences, other theft, criminal damage and arson and shopping lifting represent approximately 82% of all crimes within the area.

Table 16: Crime figures for Bromsgrove Town centre (St. Johns Ward) October 2013 to September 2014

Crime	Total	Percentage*
Anti-social behaviour	57	47.1%
Bicycle theft	26	1.7%
Burglary	87	5.6%
Criminal damage and arson	129	8.2%
Drugs	49	3.1%
Other crime	7	0.4%
Other theft	139	8.9%
Possession of weapons	3	0.2%
Public order	33	2.1%
Robbery	10	0.6%
Shoplifting	112	7.2%
Theft from the person	28	1.8%
Vehicle crime	43	2.8%
Violence and sexual offences	163	10.4%
TOTAL	**1,566**	**100.0%**

Source: West Mercia Constabulary (2014)

** Percentage figures have been rounded*

4.116 The September 2016 monthly crime report (Worcestershire County Council, 2015) shows all the offences per ward throughout the District, which includes burglary, criminal damage, vehicle crime and assault. There were 41 offences recorded in September 2015 in St. John's ward, followed by 32 in Charford and 27 in Sidemoor and 26. There were also 57 anti-social behaviour incidents reported in St. John's ward, followed by 22 in Charford and 12 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

[6] http://www.police.uk/west-mercia/PAD09/

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 an attractive shopping environment, it affects the perception of safety to pedestrians after dark. The high enclosure means that passing 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. The encouragement of Town centre living and measures to design out crime will assist in this respect.

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 limited gateway features to inform people their entrance to Bromsgrove town centre. The image of the town to passing traffic 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 relation to the Recreation Ground in front of Asda, respondents would like t see the landscaping, planting and facilities on the site be improved (42%).

4.125 Following on from these respondent views, major works have already been completed to improve the Town Centre. The Bromsgrove Townscape Heritage Initiative (THI) is a £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 their original design, which improves the appearance of the area. There are currently more premises enquiring about this scheme. Public realm works along the High Street were completed in September 2014.

4.126 Future Surveys may wish to consider assessing the impact of the public realm improvements and in particular monitor their wear and tear. Following the count and subsequent re-opening of the High Street a build-up of dirt (Chewing gum, vehicle oil and general wear and tear) including the discoloration of the natural stone is noticeable in certain parts of the high street pavement. This is particularly noticeable around the market stalls outside Barclays Bank and Peacocks. It will be important to try to minimise all but essential vehicles within the high street to help minimse wear and tear and potential damage to public realm facilities. There is also the issue of statutory undertakers carrying out work and not replacing the paviours but instead replacing with tarmac. It is anticipated that the appointment of the new Bromsgrove's Centres manager will assist in tackling such issues.

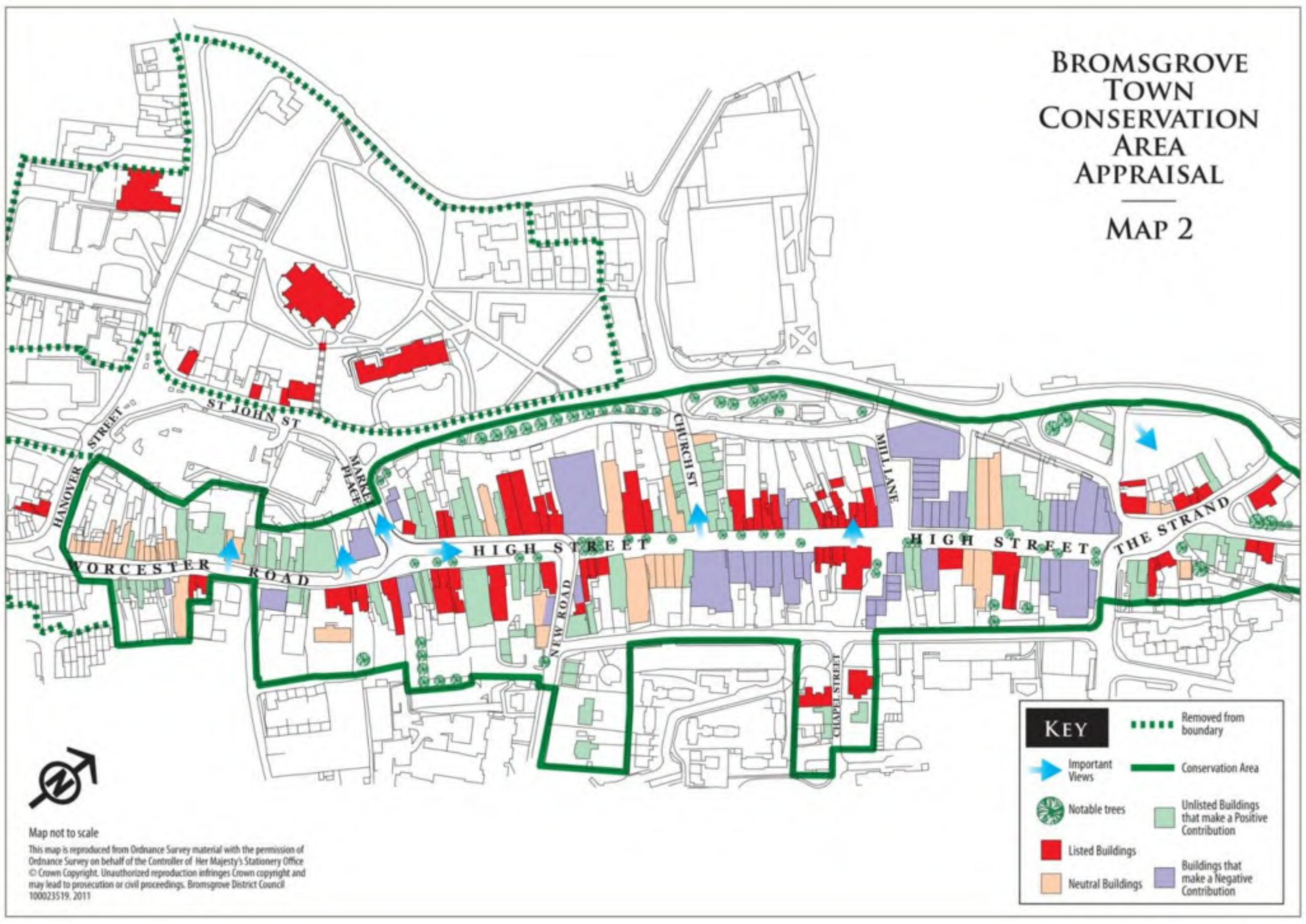
The Historic Environment

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.

4.127 A new St. John's Conservation Area was designated on 1st June 2011 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.

Figure 12: Bromsgrove Town Conservation Area



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 have been 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.

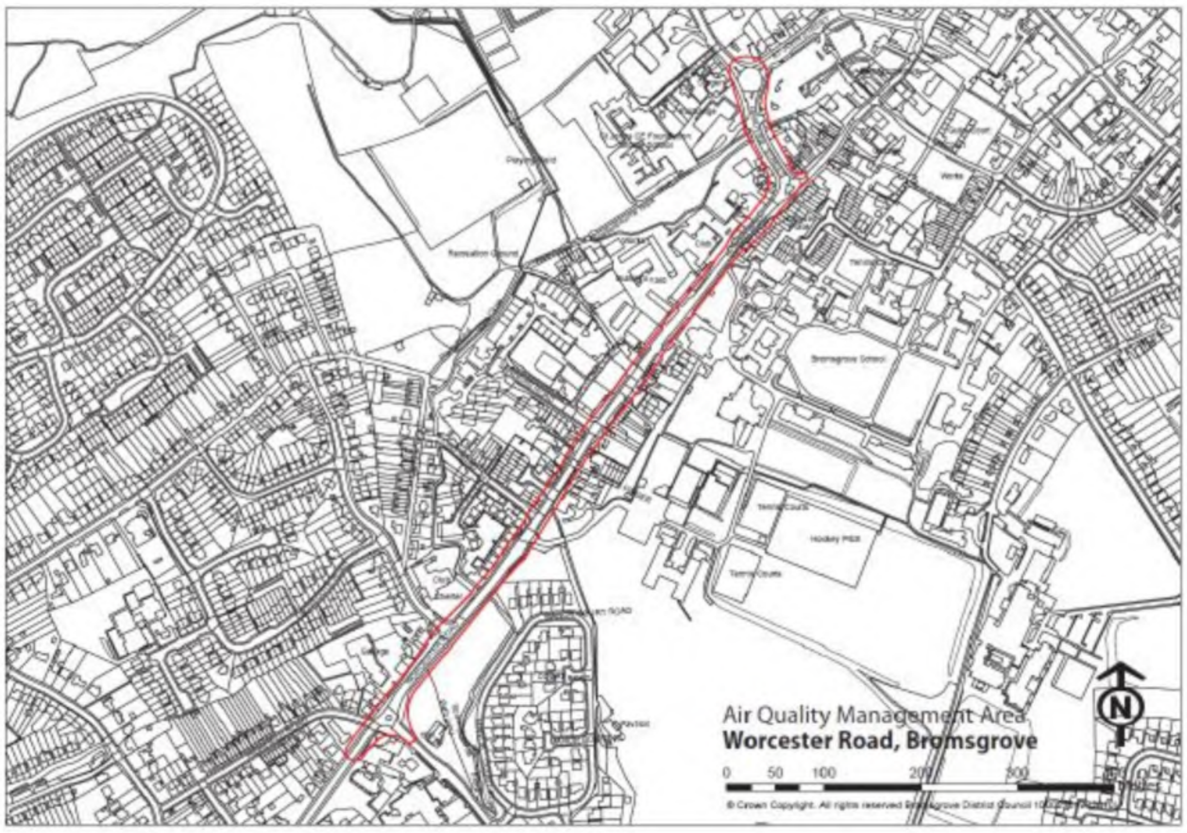
4.127 As part of the High Street public realm improvements trees were removed but new younger trees have been replace to soften the predominant urban feel of the High Street. These trees have been incorporated as part of the seating accommodation found along the length of the High Street.

Air pollution

4.128 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 and the fourth at Worcester Road. Each of these AQMAs has been declared as a result of measured or predicted exceedances 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.

4.129 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 exceedances 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.

Figure 13: Worcester Road AQMA



4.130 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 40µg/m³ at sensitive ground floor and first floor receptors along the Worcester Road. The maximum modelled annual mean nitrogen dioxide concentration in 2009 was 51.5µg/m3. Annual mean nitrogen dioxide contour plots show that where receptors fall outside of the 40 µg/m3 contour at ground-floor level, they tend to fall within the 36 µg/m3 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 µg/m3 contour to be precautionary, and approved by members in June 2011.

4.131 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 2016 annual Bromsgrove Town Centre Health Check is the eighth edition since 2009. The study monitors the vitality and viability of the town centre through the consideration of economic, environmental and social factors. Bromsgrove District Council maintains that a holistic approach to the redevelopment of the town centre is still 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 Bromsgrove District Plan.

5.2 The predominant ground floor use in the town centre is A1. In 2015 there were 147 A1 units accounting for 72% of the ground floor units in the town centre. These figures have remained relatively high since the first Health check survey in 2009, which is a generally positive factor across the town centre. Despite the high percentage of the amount of retail floor space, 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.

5.3 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. Previous studies have shown the market to have a significant impact on increasing pedestrian numbers. With the absence of the Farmers Market from the High Street this monitoring year records unsurprisingly show that footfall is down on previous years. However caution must be applied when making casual comparisons as this monitoring year witnessed significant development within the High Street and unseasonal wet weather on the Saturday; these factors may have further affected footfall. Next year's monitor will be useful as it will be able to compare a fully functioning High Street devoid of construction works which might have affected footfall in 2014.

5.5 The 2015/16 figures have remained fairly consistent with the 2014 ground floor use class survey, with only relatively few changes. The number of retail units (A1) has increased across the town centre by six units, with the largest increase being in the Primary Shopping Zone. The number of vacant units has decreased from 42 to 35 units, representing 10.3% of all units. Other minor changes from 2013 include an increase of four A2 units and one A4 units; and a loss of two B1 units, one D1 unit and three SG units.

5.6 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 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.

5.7 It is recommended that the next survey acquires a more up to date Goad Category Report as it will be four years out of date and will not accurately reflect the health of the retail market and wider economy. Economic data published by ONS[7] in November 2014 show that the UK's annual growth of 3.0% is on a par with trend growth rates prior to the downturn, albeit other commentators recognise that the economy in 2015 is likely to grow at a slower rate due to concerns of the European economy[8]. Colliers Midsummer Retail Report 2014 finds that there are four potential trends that will continue to affect the viability and vitality of Bromsgrove Town Centre. These are:

1. It finds that there is an increasing domination by regional 'experience' shopping centres while the future looks uncertain for some secondary centres, such as Bromsgrove Town Centre;
2. Online retail spending continues to see double digit growth (11%) to over £36 billion in 2013 but its annual rate of increase is now starting to slow as the market place begins to show early signs of maturing;
3. A 'Foodstore revolution' is driving new out of town development as maturing discount operators look for new outlets. Colliers state that the days of the large food superstore are largely numbered and convenience stores have become the primary focus of expansion plans. In the non-food retail market the overhang of the brand failures at MFI, Focus and Comet have now been fairly well absorbed in most parts of the country, primarily by discount retailers as demonstrated by the occupation of 'What!' in the former Focus DIY unit. and
4. Projection trends[9] forward into 2015, one-in-six small to medium sized online retailers are planning to expand into physical stores in the UK and this is evidenced by interest from Waitrose and Aldi. .

5.8 To mitigate and take advantage of these emerging trends it is clear that Bromsgrove needs to continue the improvements already delivered in 2014. Local evidence[10] prepared for the Bromsgrove District Plan identify that larger format retail units are required in Bromsgrove to attract retailers in to the town centre. . A total of ten sites are 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 town centre for the benefit of the wider area.

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[7] ONS Economic Review, November 2015 http://www.ons.gov.uk/ons/dcp171766_383865.pdf

[8] Economic Indicators, November 2014 (House of Commons Library Research paper 14/58) http://www.parliament.uk/briefing-papers/rp14-58/economic-indicators-november-2014

[9] Colliers Midsummer Retail Report 2014

[10] CBRE Retail Study 2013 http://www.bromsgrove.gov.uk/cms/environment-and-planning/planning/strategic-planning/bromsgrove-district-plan/core-documents-list.aspx

5.9 Each year from 2009 to 2012 (as well as 2013, 2014 and 2015/16), the pedestrian flow has been surveyed on a non-market weekday, a market weekday, and a Saturday market day (which was also the Saturday farmers market in 2009, 2010, 2011 and 2013). 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. The 2015/16 survey was conducted in November 2015, January 2016 and July 2016 due to weather and timing constraints which was not ideal. In order to maintain comprehensive data all subsequent counts will be conducted in July. It was stated in previous editions that the count would also coincide with the Saturday Farmers Market. As the 2013 study, data was collected at seven location points so comparisons can be made year on year.

5.10 In previous years the trend showed the town centre was getting busier and in particular on Saturday's that coincided with the Farmers Market.

5.11 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.

5.12 Bromsgrove remains an accessible location by visitors who can access the town centre via train, bus, taxis, on foot, bicycle and car. The new railway station and more frequent services will enhance the numbers of people accessing the centre, especially with improved links from the centre. These proposals have been 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.

5.13 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 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.

5.14 Overall, there has been a reduction in the number of vacant units which is an improvement on previous years and shows that the High Street is improving.

5.15 The town centre continues to be dominated by A Class Uses and they make up 80% within the Town Centre of all uses. Within the Primary Shopping Area A1 uses accounts for 71% (121 out of 170 units). There has been an overall increase of A1 units in the primary shopping area for 2015. Marginal changes occurred elsewhere within other uses. At 2012 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 illustrated in this year's Health Check is the continuing reduction in shopping rents. Rents across the West Midlands are 23% below pre-recession levels. Data for Bromsgrove was not readily available in 2016.

5.16 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 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 the new civic centre and relocated library has helped assist with this, although further development is also required in order to improve the town centre's performance. Development for a retirement village at Recreation Road is underway and a retail scheme at the former Market Hall site will help improve the vitality of the Town Centre. 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.

5.17 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
- Public realm improvement across the High Street
- 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 off the High Street
- Limited footfall along Worcester Road
- Limited provision of evening related activities/uses

Opportunities
- National multiples and retail/food offer at the proposed 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
- Electrification of the local rail network

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 and subsequent ‘baseline’ reports.

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. Although not reported, non-ground floor properties for rent and sale have been monitored in the Town Centre where advertised by local estate agents. This data is currently very patchy however over time it may provide a good source of information as the current use and uptake of non-ground floor properties in the Town Centre.

6.3 The Health Check should be used as an informed evidence base document 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. 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. It is recommended that a new Goad Plan is purchased in 2016 to better reflect the current uses and health 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 weekday and a Saturday, it was not possible to estimate a weekly footfall count without including a footfall on a Sunday, which should 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.

6.5 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.

6.6 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 detailed specifically to the Town Centre.

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.
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

Term	Definition
	centre independently, with freedom, confidence and dignity.
Sustainable Development	A widely used definition drawn up by the World Commission on Environment and Development in 1987: *"Development that meets the needs of the present without compromising the ability of future generations to meet their own needs".* The Government's four aims, to be achieved simultaneously are: • 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.

Annex B: Street surveys record of Bromsgrove Town Centre, 2015/16 (ground floor)

	Primary shopping area			
	Business Name	**No**	**Street**	**Class 14**
1	Lemon tree café	1	Chapel Street	A3
2	Phone Club	3	Chapel Street	A1
3	Plaza Coffee	5	Chapel Street	A1
4	Scruples salon	7	Chapel Street	A1
5	The Art Café	9	Chapel Street	A3
6	Nails Avenue	1a	Church Street	A1
7	S&H School & Sports wear	1b	Church Street	A1
8	Clippers salon	4	Church Street	A1
9	The Bromsgrove Cobbler	6a	Church Street	A1
10	Aubrey Bernard salon	7	Church Street	Vacant (A1)
11	K Bassam Jewellery	8	Church Street	A1
12	Age UK	9	Church Street	A1
13	Wok Kitchen	10	Church Street	A5
14	Hair Shack	11	Church Street	A1
15	Electrical Services Ltd	12	Church Street	A1
16	School Days	13 to 15	Church Street	A1
17	CV Firminger & Co financial advisor	6a	Church Street	A2
18	M & M's hair Shack	11	Church Street (Coronation House)	A1
19	Shimla Peppers	1	George Street	A3
20	Artize Hair	3	High Street	A1
21	Bromsgrove Advertiser	5	High Street	A1
22	Indian Spice	7	High Street	A3
23	Vacant	9	High Street	Vacant (A1)
24	Urban Angel	10	High Street	A1
25	Primrose Hospice	12	High Street	A1
26	Holland & Barrett	15	High Street	Vacant (A1)
27	Allan Morris	18	High Street	A2
28	Golden Cross Hotel Weatherspoon	20	High Street	A4
29	Co-op Funeral Care	23	High Street	A1
30	Pizza Express	25	High Street	A3
31	Dixons Countrywide	31	High Street	A2
32	Bank Solicitors	38	High Street	A2
33	The Regency	40	High Street	A3
34	UK Barber Shop	42	High Street	A1

35	Bromsgrove Standard	44	High Street	Vacant (B1)
36	Eyedeals Eye Care	46	High Street	A1
37	HSBC	47	High Street	A2
38	West Bromwich Building Society	48	High Street	A2
39	Vacant	49	High Street	Vacant (A1)
40	British Heart Foundation	50	High Street	A1
41	Hallmark	51	High Street	A1
42	Nationwide	52	High Street	A2
43	Leigh Jones Butchers & Delicatessen	53	High Street	A1
44	Holland & Barrett	55	High Street	A1
45	F Hinds	59	High Street	A1
46	Robert Oulsnam & Co	61	High Street	A2
47	Lorita's Bakehouse	62	High Street	A3
48	Max Spielman	63	High Street	A1
49	Boots Optician	64	High Street	A1
50	Lesley Ashworth Accessories	65	High Street	A1
51	Millers	67	High Street	A1
52	Vodaphone	69	High Street	A1
53	E-cigerette	71	High Street	A1
54	The Red Lion	73	High Street	A4
55	Coffee 2	74	High Street	A3
56	Blunts	75	High Street	A1
57	Restored	76	High Street	A1
58	Boots	78	High Street	A1
59	Carphone Warehouse	80	High Street	A1
60	Ladbrokes	82	High Street	A2
61	Sporting Barbers	85	High Street	A1
62	French Connection Baguette	87	High Street	A1
63	Thomson	91	High Street	A1
64	Thomas Cook	92	High Street	A1
65	Santander	93	High Street	A2
66	The Works	94	High Street	A1
67	Ryman Stationery	95	High Street	A1
68	Martin's local shop	96	High Street	A1
69	New Look	97	High Street	A1
70	Card Party	99	High Street	A1
71	Oxfam book shop	101	High Street	A1
72	Chapmans Opticians	103	High Street	A1
73	The Peer Group	106	High Street	A1
74	Madaboutsweets	108	High Street	A1

75	Acorns	109	High Street	A1
76	Hoyti-Toyti	110	High Street	A1
77	Shipleys	111	High Street	SG
78	Lloyds	112	High Street	A2
79	Dorothy Perkins (Burtons on first floor)	113	High Street	A1
80	EE	114	High Street	A1
81	M & Co	115	High Street	A1
82	Vacant	116	High Street	Vacant (A1)
83	Barclays	118	High Street	A2
84	Foto Factory	123	High Street	A1
85	Natwest Bank	124	High Street	A2
86	PDSA	125	High Street	A1
87	The Blue Cross	127	High Street	A1
88	Premiere People	129	High Street	A2
89	Specsavers	131	High Street	A1
90	Chapters Hair	133	High Street	A1
91	Ponden Home	138	High Street	A1
92	Argos	140	High Street	A1
93	Sweetz	140	High Street	A1
94	William Hill	140	High Street	A2
95	Greggs	102 to 104	High Street	A3
96	Savers	105 to 107	High Street	A1
97	The Grove	11 to 13	High Street	A4
98	Timpsons	112a	High Street	A1
99	Sense	112b	High Street	A1
100	Post Office	117 to 121	High Street	A1
101	Peacocks	120,120a	High Street	A1
102	Halifax	122,122a	High Street	A2
103	The Slug and Lettuce	128 to 130	High Street	A4
104	Careforce Ltd	12a Holland House	High Street	B1
105	Subway	131a	High Street	A3
106	Cancer Research UK	132 to 136	High Street	A1
107	Dominos	133a	High Street	A5
108	Sports Direct	138 - 140	High Street	Vacant (A1)
109	Pizza Hut	14 to 16	High Street	Vacant (A3)
110	Betfred	17 to 21	High Street	A2
111	Vacant (Motor World)	2 to 4	High Street	Vacant (A1)
112	Prezzo	22 to 24	High Street	A3
113	The Bedroom Centre	27 to 29	High Street	A1
114	Salvation Army	33,35	High Street	A1

115	Poundland	37 to 41	High Street	A1
116	Bodycare	43 to 45	High Street	A1
117	W H Smith	54 to 56	High Street	A1
118	Twenty One	58 to 60	High Street	A1
119	A Plan Insurance	6 to 8	High Street	A2
120	Smart Deals	66	High Street	A1
121	Thorntons	68	High Street	A1
122	Card Factory	77 to 79	High Street	A1
123	Edinburgh Woollen Mill	81 to 83	High Street	A1
124	Costa	84 to 86	High Street	A3
125	Compuclear	87a	High Street	A1
126	Clinton Cards	88 to 90	High Street	A1
127	Casa Med	89a & 89b	High Street	A3
128	Bromsgrove Menswear	91a	High Street	A1
129	Vacant	98 to 100	High Street	Vacant (A1)
130	Vacant	The Coach House	High Street	Vacant (A1)
131	MFG solicitors	1	High Street (& 2 to 6 Market Place)	A2
132	Market Plaice Fish Bar	26	Market Street	A5
133	Midlands Co-op Travel	2	Mill Lane	A1
134	Fresh Flowers	4	Mill Lane	A1
134	Thompsons	6	Mill Lane	Vacant (A1)
135	Extra Care	8	Mill Lane	A1
136	Johns Fruit & Veg	10	Mill Lane	A1
137	Iceland	12	Mill Lane	A1
138	Spains	2	New Road	A1
139	GB hairdressing	4	New Road	A1
140	Alberto Policarpo Hair Salon	5	New Road	A1
141	Andrew Grant	5	New Road	A2
142	Hansons estate agent	6	New Road	A2
143	Your Move	1 to 3	New Road	A2
144	Ocean Fish Bar	12	The Strand	A5
145	Bromsgrove Community Hall	14	The Strand	D1
146	Cupitts	16	The Strand	A1
147	Michael Stewart Photography	16	The Strand	Vacant (A1)
148	Hair Art	16	The Strand	A1
149	Arty Facts Studio	18	The Strand	A1
150	Midland Water Life	20 to 24	The Strand	A1
151	Adams and Creed Properties	26,26a	The Strand	A2

152	Touch of Beauty	6 and 10	The Strand	A1
153	Vintage Cottage	2 to 4	The Strand, The Strand Centre	Vacant (A1)
154	Strand Nails	2 to 4	The Strand, The Strand Centre	A1
155	Upcyclists	2 to 4	The Strand, The Strand Centre	A1
156	Bromsgrove Computer Centre	2 to 4	The Strand, The Strand Centre	A1
157	B61 Takeaway	2 to 4	The Strand, The Strand Centre	A5
158	Arden Estate Agents	2 to 4	The Strand, The Strand Centre	A2
159	Phone Locker (to the side of centre)	2 to 4	The Strand, The Strand Centre	A1
160	Flavours	1	Worcester Road	A3
161	Blockbuster (Vacant)	2	Worcester Road	Vacant (A1)
162	Ladbrokes	3	Worcester Road	A2
163	AP Morgan Estate Agents	4	Worcester Road	A2
164	Flash Photography Studio	4a	Worcester Road	A1
165	Eco Centre	6	Worcester Road	Vacant (A1)
166	Loopy Ladies Craft	8	Worcester Road	A1
167	Maekong Thai	12	Worcester Road	A3
168	Bromsgrove Printing Co	14	Worcester Road	B2
169	K K Mart	16	Worcester Road	A1
170	KSH O Carpet & Flooring	18	Worcester Road	A1

	Secondary shopping area			
	Business Name	**No**	**Street**	**Class 14**
171	Knights Chemist	36	Birmingham Road	A1
172	YMCA Furniture	54a	Birmingham Road	A1
173	Co-Op	54b	Birmingham Road	A1
174	Ormerod Rutter accountants & Chattered Accountants & book keeping	48	Birmingham Road	A2
175	Citizens Advice Bureau	50 to 52	Birmingham Road	A2
176	The Rovers Cafe	34	Birmingham Road	A3
177	Papa Johns	32	Birmingham Road	A5
178	China Wok	30	Birmingham Road	A5
179	Davenal House Surgery	28	Birmingham Road	D1
180	Museum	28	Birmingham Road	Vacant (D1)
181	Texaco petrol station and auxillary shop (Vacant)	38 to 46	Birmingham Road	Vacant (SG)
182	WHAT Store (Vacant)	54	Birmingham Road	Vacant

				(A1)
183	Wing Lee	3,3a,3c	Hanover Street	A5
184	BYHF The Basement Project	1	Hanover Street	B1
185	Total Autos Care	3a,3c	Hanover Street	SG
186	Neales Garage - Hyundai	2 to 12	Station Street	SG
187	Kash Kwik	17	The Strand	A2
188	Strand Barbers	19	The Strand	A1
189	Cake Magic	21	The Strand	A1
190	Vacant	25	The Strand	Vacant (A1)
191	Mitre House financial planning	27	The Strand	A2
192	Thomas Holton Solicitors office	The Strand House	The Strand	A2
193	Queen's Head	1	The Strand	A4
194	Ann Marie	17	Worcester Road	A1
195	Hairs & Graces	19	Worcester Road	A1
196	Manhattan nails & spa	40	Worcester Road	A1
197	Capillago	41	Worcester Road	A1
198	Hair, Beauty & Nails	43	Worcester Road	A1
199	The sandwich lady and sons	42	Worcester Road	A1
200	Eileen Bicknell Interiors	48	Worcester Road	A1
201	The Sugarcraft Emporium	56	Worcester Road	A1
202	Timothy James Partnership	59	Worcester Road	A2
203	Parkes Hair & Beauty	62	Worcester Road	A1
204	Instruments for You	64	Worcester Road	A1
205	Denise Lesley salon	78	Worcester Road	A1
206	Bromsgrove Carpets & bedding warehouse	28 to 32	Worcester Road	A1
207	Zig-Zag Hair	42a	Worcester Road	A1
208	Bromsgrove School of Music	13 to 15	Worcester Road	D1
209	Pinfield Business and PC Solutions	51	Worcester Road	A2
210	Worcester Road News Agents	52 to 54	Worcester Road	A1
211	Leaders Estate Agents	11	Worcester Road	A2
212	Pinfields Accountants	57 & 61	Worcester Road	A2
213	On the Rocks	44	Worcester Road	A3
214	Kip McGrath Education Centre	50	Worcester Road	D1
215	Spice Valley Balti	74	Worcester Road	A3
216	Dog & Pheasant pub	24 to 26	Worcester Road	A4
217	Ye Olde Black Cross	70 to 72	Worcester Road	A4
218	DJ's Chips	Rear 24 to 26	Worcester Road	A5

219	Antonio's pizza	34	Worcester Road	A5
220	Anarkali Indian Takeaway	55	Worcester Road	A5
221	Charlies Kebabs	58	Worcester Road	A5
222	New Orient	60	Worcester Road	A5
223	Darr's Fish & Chips	66-68	Worcester Road	A5
224	Ruby	76	Worcester Road	A5
225	Office	5	Worcester Road	B1
226	Orange Foster House, Bellway House	7	Worcester Road	B1
227	Bromsgrove Conservative Association	37	Worcester Road	B1
228	Bromsgrove Brew Badger	10	Worcester Road	Vacant (A1)
229	Adrian Kriss & Associates	47 to 49	Worcester Road	D1
230	The Maxx (Tatooists & Body Peircing)	36	Worcester Road	SG
231	Love 2 Love	39	Worcester Road	SG
232	Little Ale House	21	Worcester Road	A4
233	Istanbul Grill	33-35	Worcester Road	A5
234	The Battered Cod	38	Worcester Road	A5
235	Chicago Pizza	45	Worcester Road	A5
236	GR Barbers / Salon	46	Worcester Road	A1
237	Rosmetics Skin Clinic	53	Worcester Road	A1

	Other areas			
	Business Name	**No**	**Street**	**Class 14**
238	Benesseie hair & beauty	68	Birmingham Road	A1
239	Geeves dry cleaner	104	Birmingham Road	A1
240	Costello	106	Birmingham Road	A1
241	The Wine Cabin	108	Birmingham Road	A1
242	Halfords	114	Birmingham Road	A1
243	Speeds	70,72,72a	Birmingham Road	A1
244	Townsend Textiles	74 to 76	Birmingham Road	A1
245	Hollies Solicitor	60	Birmingham Road	A2
246	Mint Lounge	31 to 33	Birmingham Road	A3
247	Hop Pole	78	Birmingham Road	A4
248	The Crabmill Inn	116 to 122	Birmingham Road	A4
249	Ideal fish & chips	110	Birmingham Road	A5
250	Oriental Royal	112	Birmingham Road	A5
251	Elisa Smile Centre	66	Birmingham Road	D1
252	Bromsgrove Football Club		Birmingham Road	D2
253	Imagination Street (Vacant)	31	Birmingham Road	Vacant (D1)
254	All Saints Garage	125 to 137	Birmingham Road	SG

	(Vauxhall)			
256	Elite Motors	container office by 31	Birmingham Road	B1
257	Elite Car Wash	26	Birmingham Road	Sui Generis
258	Vacant (clarks garage)	29	Birmingham Road	Vacant (SG)
259	BP Garage and Spar	88 to 92	Birmingham Road	SG
260	Wills Wigs hairdresser (Vacant)	49	Birmingham Road	Vacant (A1)
261	The Chauntry Corporation Ltd (Holt Studios 3); (Vacant)	49,49a	Birmingham Road (1, 2, 3 Holt Studios)	Vacant (B1)
262	Vacant	49,49a	Birmingham Road (4 & 5 Holt Studios)	Vacant (B1)
263	Pale Purple	49,49a	Birmingham Road (4 Holt Studios)	B1
264	Health & Beauty Within	49,49a	Birmingham Road (5 & 6 Holt Studios)	A1
265	All saints church		Burcot Lane	D1
266	Hamptons Optical Ltd.	9	Crown Close	A1
267	Tandoori	11	Crown Close	A3
268	BSS Office Supplies	12	Hanover Street	A1
269	G R Brickstock & Assocaites - accountant	10	Hanover Street	A2
270	Office	14	Hanover Street	B1
271	Tan & Tone Centre	Rear of 43	High Street	SG
272	Mark England Garden Design (Vacant)	11	Kidderminster Road	Vacant (B1)
273	Clent Hills Vetinary Group	5	Kidderminster Road	D1
274	St Johns Counselling	9	Kidderminster Road	D1
275	Vacant	7	Kidderminster Road	Vacant
276	Bromsgrove Dog Beauticians	1	Little Lane	SG
277	Guitar Tutoring	1a	Little Lane	D1
278	Knights Pharmacy	18	Market Street	A1
279	Asda Stores Ltd.	21	Market Street	A1
280	Just for pets	20 to 22	Market Street	A1
281	Harveys	The Well House	Market Street	Vacant
282	Fisher German Estate Agent	8	New Road	A2
283	Charles Howell Estate Agent	13	New Road	A2
284	GJS Dillon	13	New Road	A2
285	Kenneth Morris Accountants	9 to 11	New Road	A2
286	Office	Shire House	Paradise Row	B1
287	Retirement Village (under	2 to 4	Recreation Road	UC

	construction)			
288	Registry Office		School Drive	B1
289	The Dolphin Centre		School Drive	D2
290	North Bromsgrove High School		School Drive	C2
291	The Artrix		School Drive	SG
292	Nursery		Shenstone Close	D1
293	George Davis salon	14	St John Street	A1
294	Holt & Sellars - Solicitors	10	St John Street	A2
295	A Victor Powell	12	St John Street	A2
296	Robert Fearon & Co	18	St John Street	A2
297	S Haskey Architects	20	St John Street	A2
298	Harrison Priddy & Co – accountants (Vacant)	22	St John Street	Vacant (A2)
299	Holt & Sellars – Solicitors (Under Construction)	12a	St John Street	Vacant (UC)
300	J Turner Associates	20	St John Street	A2
301	Bromsgrove Allergy & Nutrition	18	St John Street	D1
302	The Wishing Well Holistic Centre	16	St John Street	A1
303	Kay-Bee engineering	Unit 4	Station Street	B8
304	Well Fit (Vacant)	Unit 8	Station Street	Vacant (D2)
305	Neales Garage	Garage	Station Street	SG
306	KW Autos	Unit 6	Station Street	SG
307	Bromsgrove Fireplaces	8	Stourbridge Road	A1
308	Jame Giles & Sons Funerals	22a	Stourbridge Road	A1
309	Lloyds Pharmacy	BHI Parkside	Stourbridge Road	A1
310	Eyecare Opticians	BHI Parkside	Stourbridge Road	A1
311	St John's Street Surgery	BHI Parkside	Stourbridge Road	D1
312	Churchfields Surgery	BHI Parkside	Stourbridge Road	D1
313	Parkside Dental Practice	BHI Parkside	Stourbridge Road	D1
314	Catherine Adam's Physiotherapy	BHI Parkside	Stourbridge Road	D1
315	Castle Nursery	BHI Parkside	Stourbridge Road	D1
316	Parkside Motors	8	Stourbridge Road	SG
317	Parkside Middle School- New Library & Council Offices	1,1a	Stourbridge Road	D1
318	Vacant	14 to 22	Stourbridge Road	Vacant (A1)
319	Tyre Centre (Vacant)	2	Stratford Road	SG
320	Worcestershire County Council		Windsor Street	B1
321	Library		Windsor Street	D1
322	Meridian health & beauty	2	Windsor Street	SG

	clinic			
323	Age Concern	51	Windsor Street	SG
324	Tyrecare (Midlands) Ltd.	NN	Windsor Street	SG
325	Fire Station		Windsor Street	Vacant (D1)
326	Police		Windsor Street	Vacant (D1)
327	Vacant	5	Windsor Street	Vacant (D1)
328	Handy Print	118	Worcester Road	A1
329	Bromsgrove Domestic	124	Worcester Road	A1
330	Broadstreet DIY	128	Worcester Road	A1
331	Jewsons DIY	106 to 116a	Worcester Road	A1
332	Phoenix Carpet & Bed Sales	94 to 96	Worcester Road	A1
333	Big Daves Café	141 to 143	Worcester Road	A3
334	Thai Lotus	147a	Worcester Road	A3
335	The Turk's Head	147	Worcester Road	A4
336	Vinci Construction	86	Worcester Road	B1
337	Office	122	Worcester Road	B1
338	Altered Images fitness	80	Worcester Road	D2
339	Kwik-fit	126	Worcester Road	SG
340	Britannia House Hair & Beauty	165	Worcester Road	A1

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Goad Category Report

Bromsgrove

Survey Date: 18/09/2012

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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

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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
Debenhams	0
House of Fraser	0
John Lewis	0
Marks & Spencer	0

Mixed Goods Retailers

Argos	1
Boots the Chemist	1
T K Maxx	0
W H Smith	1
Wilkinson	0

Supermarkets

Sainsburys	0
Tesco	0
Waitrose	0

Clothing

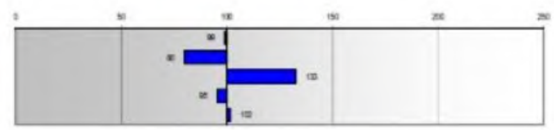
Burton	1
Dorothy Perkins	1
H & M	0
New Look	1
Next	0
Primark	0
River Island	0
Topman	0
Topshop	0

Other Retailers

Carphone Warehouse	1
Clarks	0
Clintons	1
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	42.86	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			

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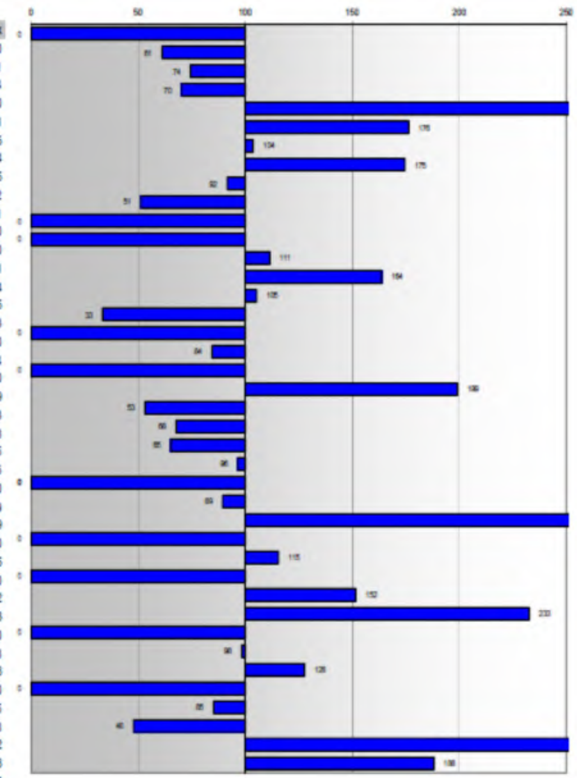
Base: All UK Centres

Sector	Classification	Outlets	Area %	Base %	Index
Comparison		Outlets	Area %	Base %	Index
	Antique Shops	0	0.00	0.41	0
	Art & Art Dealers	1	0.39	0.64	61
	Booksellers	1	0.39	0.53	74
	Carpets & Flooring	1	0.39	0.56	70
	Catalogue Showrooms	1	0.39	0.14	281
	Charity Shops	11	4.30	2.44	176
	Chemist & Drugstores	3	1.17	1.13	104
	Childrens & Infants Wear	2	0.78	0.45	175
	Clothing General	5	1.95	2.13	92
	Crafts, Gifts, China & Glass	2	0.78	1.52	51
	Cycles & Accessories	0	0.00	0.24	0
	Department & Variety Stores	0	0.00	0.36	0
	DIY & Home Improvement	2	0.78	0.70	111
	Electrical & Other Durable Goods	6	2.34	1.43	164
	Florists	2	0.78	0.74	105
	Footwear	1	0.39	1.17	33
	Furniture Fitted	0	0.00	0.39	0
	Furniture General	2	0.78	0.92	84
	Gardens & Equipment	0	0.00	0.05	0
	Greeting Cards	4	1.56	0.78	199
	Hardware & Household Goods	2	0.78	1.47	53
	Jewellery, Watches & Silver	3	1.17	1.73	68
	Ladies & Mens Wear & Acc.	2	0.78	1.20	65
	Ladies Wear & Accessories	7	2.73	2.83	96
	Leather & Travel Goods	0	0.00	0.17	0
	Mens Wear & Accessories	2	0.78	0.87	89
	Music & Musical Instruments	1	0.39	0.13	299
	Music & Video Recordings	0	0.00	0.25	0
	Newsagents & Stationers	4	1.56	1.35	115
	Office Supplies	0	0.00	0.03	0
	Other Comparison Goods	3	1.17	0.77	152
	Photographic & Optical	1	0.39	0.17	233
	Secondhand Goods, Books, etc.	0	0.00	0.27	0
	Sports, Camping & Leisure Goods	2	0.78	0.79	98
	Telephones & Accessories	4	1.56	1.22	128
	Textiles & Soft Furnishings	0	0.00	0.68	0
	Toiletries, Cosmetics & Beauty Products	2	0.78	0.92	85
	Toys, Games & Hobbies	1	0.39	0.82	48
	Vehicle & Motorcycle Sales	3	1.17	0.28	412
	Vehicle Accessories	1	0.39	0.21	188
	Totals	82	32.03	32.93	97



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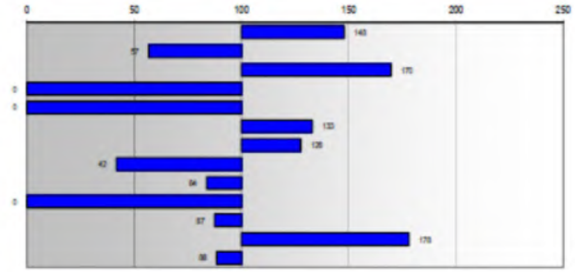
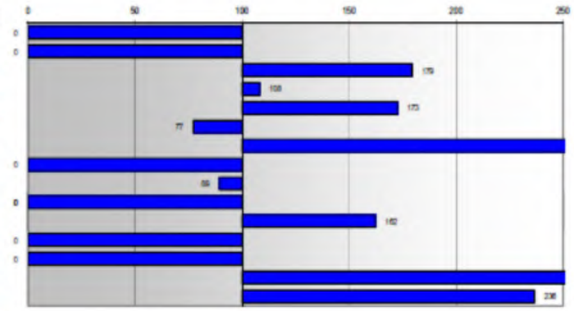
Convenience	Outlets	Area %	Base %	Index
Bakers & Confectioners	7	2.73	1.85	148
Butchers	1	0.39	0.69	57
CTN	1	0.39	0.23	170
Convenience Stores	0	0.00	1.26	0
Fishmongers	0	0.00	0.12	0
Frozen Foods	1	0.39	0.29	133
Greengrocers	1	0.39	0.31	128
Grocers & Delicatessens	1	0.39	0.94	42
Health Foods	1	0.39	0.47	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	7.03	8.03	88



Retail Service	Outlets	Area %	Base %	Index
Clothing & Fancy Dress Hire	0	0.00	0.08	0
Dry Cleaners & Launderettes	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

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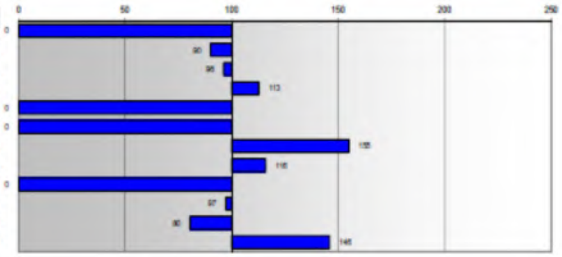
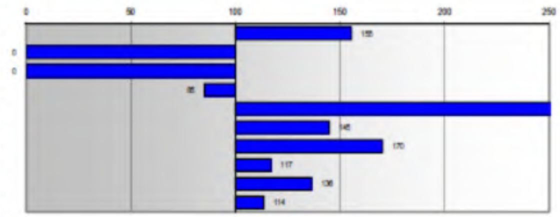
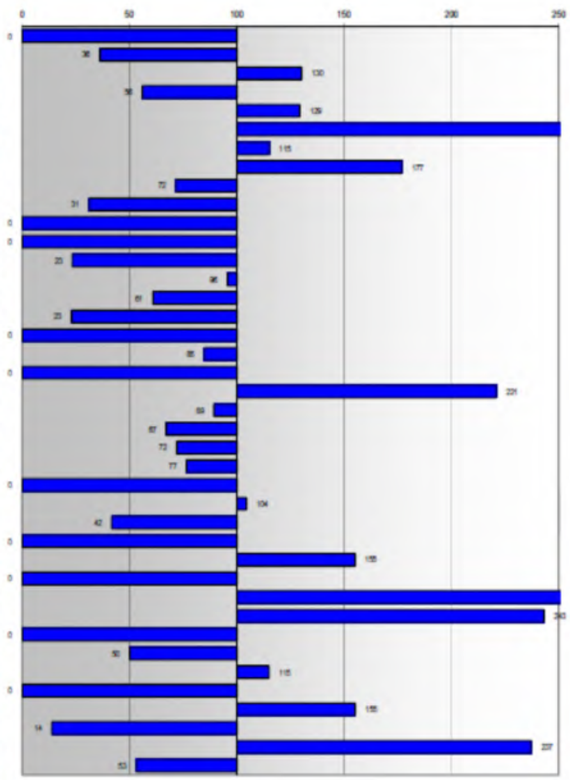
Leisure Services	Outlets	Area %	Base %	Index
Bars & Wine Bars	0	0.00	1.43	0
Bingo & Amusements	1	0.39	0.43	90
Cafes	10	3.91	4.06	96
Casinos & Betting Offices	4	1.56	1.39	113
Cinemas, Theatres & Concert Halls	0	0.00	0.25	0
Clubs	0	0.00	0.68	0
Disco, Dance & Nightclubs	1	0.39	0.25	155
Fast Food & Take 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				
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				
Vacant Retail & Service Outlets	27	10.55	12.16	87
Total Number of Outlets	256			

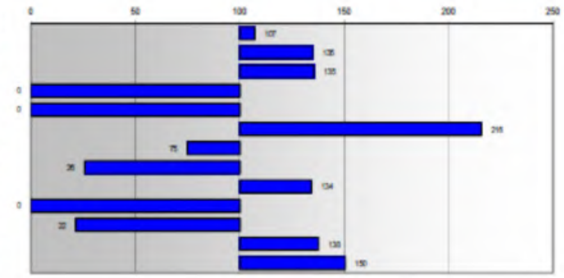




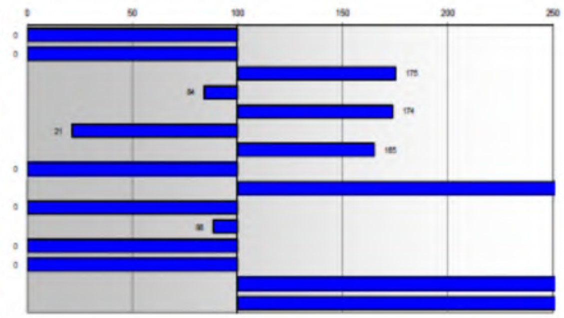
Sector	Classification	Floorspace	Area %	Base %	Index
Comparison					
	Antique Shops	0	0.00	0.22	0
	Art & Art Dealers	700	0.13	0.35	36
	Booksellers	3,100	0.57	0.44	130
	Carpets & Flooring	1,700	0.31	0.56	56
	Catalogue Showrooms	3,700	0.68	0.53	129
	Charity Shops	25,800	4.73	1.54	307
	Chemist & Drugstores	9,700	1.78	1.55	115
	Childrens & Infants Wear	3,400	0.62	0.35	177
	Clothing General	13,600	2.50	3.48	72
	Crafts, Gifts, China & Glass	1,300	0.24	0.77	31
	Cycles & Accessories	0	0.00	0.18	0
	Department & Variety Stores	0	0.00	4.47	0
	DIY & Home Improvement	1,500	0.28	1.18	23
	Electrical & Other Durable Goods	6,400	1.17	1.23	96
	Florists	900	0.17	0.27	61
	Footwear	1,200	0.22	0.96	23
	Furniture Fitted	0	0.00	0.36	0
	Furniture General	6,900	1.27	1.49	85
	Gardens & Equipment	0	0.00	0.07	0
	Greeting Cards	6,400	1.17	0.53	221
	Hardware & Household Goods	16,200	2.97	3.33	89
	Jewellery, Watches & Silver	2,700	0.50	0.74	67
	Ladies & Mens Wear & Acc.	6,300	1.16	1.61	72
	Ladies Wear & Accessories	10,800	1.98	2.59	77
	Leather & Travel Goods	0	0.00	0.10	0
	Mens Wear & Accessories	4,000	0.73	0.70	104
	Music & Musical Instruments	200	0.04	0.09	42
	Music & Video Recordings	0	0.00	0.26	0
	Newsagents & Stationers	8,200	1.50	0.97	155
	Office Supplies	0	0.00	0.07	0
	Other Comparison Goods	10,700	1.96	0.59	331
	Photographic & Optical	1,100	0.20	0.08	243
	Secondhand Goods, Books, etc.	0	0.00	0.13	0
	Sports, Camping & Leisure Goods	2,900	0.53	1.06	50
	Telephones & Accessories	4,100	0.75	0.65	115
	Textiles & Soft Furnishings	0	0.00	0.50	0
	Toiletries, Cosmetics & Beauty Products	7,400	1.36	0.87	155
	Toys, Games & Hobbies	500	0.09	0.67	14
	Vehicle & Motorcycle Sales	7,300	1.34	0.57	237
	Vehicle Accessories	700	0.13	0.24	53
	Totals	169,400	31.09	36.35	86



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
Fishmongers	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 & Launderettes	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**

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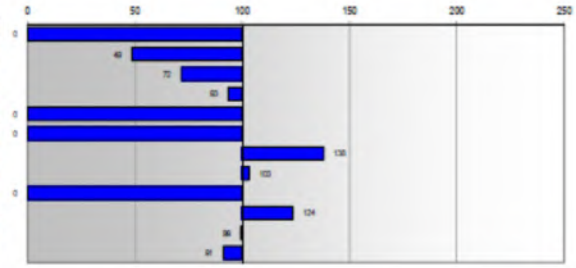
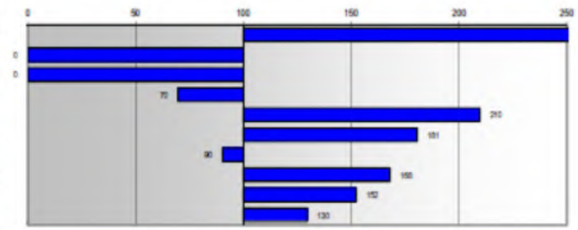
Leisure Services	Floorspace	Area %	Base %	Index
Bars & Wine Bars	0	0.00	1.80	0
Bingo & Amusements	2,400	0.44	0.91	49
Cafes	8,200	1.50	2.10	72
Casinos & Betting Offices	5,400	0.99	1.06	93
Cinemas, Theatres & Concert Halls	0	0.00	1.64	0
Clubs	0	0.00	1.16	0
Disco, Dance & Nightclubs	4,100	0.75	0.55	138
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 & Leisure 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				
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 whatsoever 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 said 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 authorised 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 whatsoever 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 authorised 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.

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Appendix D: 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
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

Date	Day	Time	Weather	Location	Count from Top to Bottom	Count from Bottom to Top	Total
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

July 2014

Date	Day	Time	Weather	Location	Out of High Street	In to High Street	Total
31/07/2014	Thursday, non-market day	09:05 - 09:15	Sunny	1	8	9	17
31/07/2014	Thursday, non-market day	09:18 - 09:28	Sunny	2	37	42	79
31/07/2014	Thursday, non-market day	09:29 - 09:39	Sunny	3	14	22	36
31/07/2014	Thursday, non-market day	09:40 - 09:50	Sunny	4	60	73	133
31/07/2014	Thursday, non-market day	09:51 - 10:01	Sunny	5	53	68	121
31/07/2014	Thursday, non-market day	10:03 - 10:13	Sunny	6	75	66	141
31/07/2014	Thursday, non-market day	10:15 - 10:25	Sunny	7	32	21	53
31/07/2014	Thursday, non-market day	12:02 - 12:12	Sunny	1	18	19	37
31/07/2014	Thursday, non-market day	12:16 - 12:26	Sunny	2	108	107	215
31/07/2014	Thursday, non-market day	12:28 - 12:38	Sunny	3	63	43	106
31/07/2014	Thursday, non-market day	12:39 - 12:49	Sunny	4	131	97	228
31/07/2014	Thursday, non-market day	12:51 - 13:01	Sunny	5	73	91	164

31/07/2014	Thursday, non-market day	13:04 - 13:14	Sunny	6	129	105	234
31/07/2014	Thursday, non-market day	13:19 - 13:29	Sunny	7	48	22	70
31/07/2014	Thursday, non-market day	15:04 - 15:14	Cloudy	1	6	3	9
31/07/2014	Thursday, non-market day	15:17 - 15:27	Cloudy	2	81	72	153
31/07/2014	Thursday, non-market day	15:29 - 15:39	Rain	3	27	20	47
31/07/2014	Thursday, non-market day	15:40 - 15:50	Rain	4	62	35	97
31/07/2014	Thursday, non-market day	15:51 - 16:02	Cloudy	5	68	23	91
31/07/2014	Thursday, non-market day	16:05 - 16:15	Rain	6	61	55	116
31/07/2014	Thursday, non-market day	16:16 - 16:26	Cloudy	7	26	15	41
25/07/2014	Friday, market day	09:02 - 09:12	Sunny	1	5	14	19
25/07/2014	Friday, market day	09:15 - 09:25	Sunny	2	41	60	101
25/07/2014	Friday, market day	09:27 - 09:37	Sunny	3	22	42	64
25/07/2014	Friday, market day	09:38 - 09:48	Sunny	4	73	61	134
25/07/2014	Friday, market day	09:50 - 10:00	Sunny	5	96	83	179
25/07/2014	Friday, market day	10:05 - 10:15	Sunny	6	90	65	155
25/07/2014	Friday, market day	10:17 - 10:27	Sunny	7	24	16	40
25/07/2014	Friday, market day	12:04 - 12:14	Sunny	1	37	36	73
25/07/2014	Friday, market day	12:17 - 12:27	Sunny	2	107	83	190
25/07/2014	Friday, market day	12:31 - 12:41	Sunny	3	59	38	97
25/07/2014	Friday, market day	12:42 - 12:52	Sunny	4	167	58	225
25/07/2014	Friday, market day	12:55 - 13:05	Sunny	5	113	97	210
25/07/2014	Friday, market day	13:09 - 13:19	Sunny	6	119	136	255
25/07/2014	Friday, market day	13:22 - 13:32	Sunny	7	36	47	83
25/07/2014	Friday, market day	15:00 - 15:10	Rain	1	25	22	47
25/07/2014	Friday, market day	15:14 - 15:24	Rain	2	84	45	129
25/07/2014	Friday, market day	15:26 - 15:36	Rain	3	30	17	47
25/07/2014	Friday, market day	15:37 - 15:47	Rain	4	70	50	120
25/07/2014	Friday, market day	15:49 - 15:59	Rain	5	90	64	154

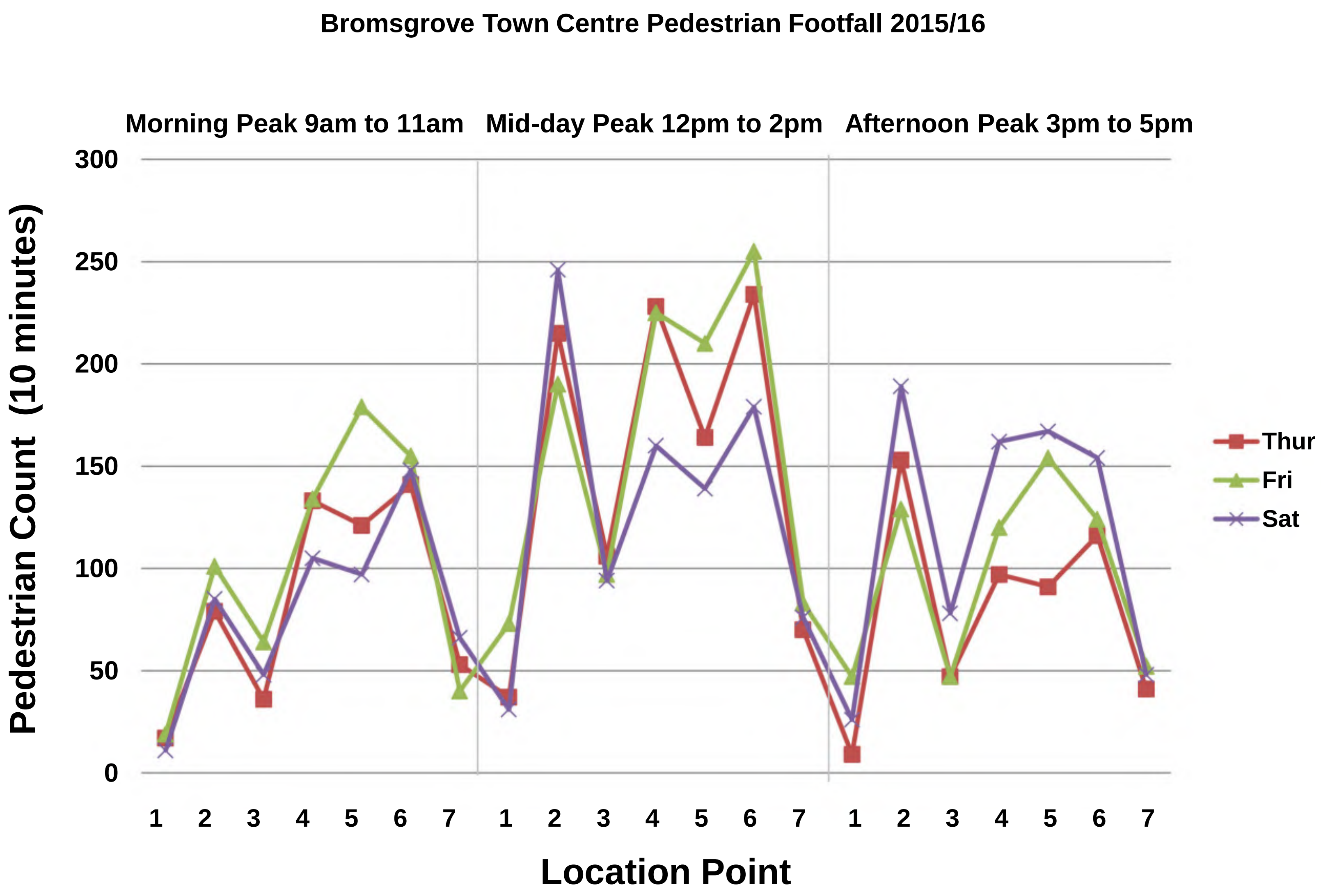
25/07/2014	Friday, market day	16:05 - 16:15	Rain	6	71	53	124
25/07/2014	Friday, market day	16:17 - 16:27	Rain	7	39	13	52
02/08/2014	Saturday, market day	08:56 - 09:06	Rain	1	0	11	11
02/08/2014	Saturday, market day	09:09 - 09:19	Rain	2	27	58	85
02/08/2014	Saturday, market day	09:21 - 09:31	Rain	3	24	24	48
02/08/2014	Saturday, market day	09:32 - 09:42	Rain	4	53	52	105
02/08/2014	Saturday, market day	09:44 - 09:54	Rain	5	55	42	97
02/08/2014	Saturday, market day	09:57 - 10:07	Rain	6	74	74	148
02/08/2014	Saturday, market day	10:09 - 10:19	Cloudy	7	42	24	66
02/08/2014	Saturday, market day	11:56 - 12:06	Cloudy	1	17	14	31
02/08/2014	Saturday, market day	12:10 - 12:20	Cloudy	2	124	122	246
02/08/2014	Saturday, market day	12:22 - 12:32	Cloudy	3	53	41	94
02/08/2014	Saturday, market day	12:33 - 12:43	Cloudy	4	89	71	160
02/08/2014	Saturday, market day	12:45 - 12:55	Cloudy	5	81	58	139
02/08/2014	Saturday, market day	12:59 - 13:09	Cloudy	6	89	90	179
02/08/2014	Saturday, market day	13:11 - 13:21	Sunny	7	44	32	76
02/08/2014	Saturday, market day	14:57 - 15:07	Sunny	1	20	6	26
02/08/2014	Saturday, market day	15:10 - 15:20	Sunny	2	83	106	189
02/08/2014	Saturday, market day	15:22 - 15:32	Sunny	3	46	32	78
02/08/2014	Saturday, market day	15:33 - 15:43	Sunny	4	82	80	162
02/08/2014	Saturday, market day	15:45 - 15:55	Sunny	5	105	62	167
02/08/2014	Saturday, market day	15:58 - 16:08	Sunny	6	87	67	154
02/08/2014	Saturday, market day	16:10 - 16:20	Sunny	7	39	9	48

November 2015 and January/July 2016

Date	Day	Time	Weather	Location	Out of High Street	In to High Street	Total
13/10/2015	Friday, market day	09:00 - 09:15	Cloudy	1	16	13	29
13/10/2015	Friday, market day	09:20 – 09.35	Cloudy	2	35	28	63
13/10/2015	Friday, market day	09.50 – 10.05	Cloudy	3	14	25	39
13/10/2015	Friday, market day	10.10 – 10.25	Cloudy	4	82	65	147
13/10/2015	Friday, market day	10.30 – 10.45	Cloudy	5	72	55	127
13/10/2015	Friday, market day	10.50 - 11.05	Cloudy	6	87	64	151
13/10/2015	Friday, market day	11.25 – 11.40	Cloudy	7	34	17	51
13/10/2015	Friday, market day	11.55 - 12:10	Cloudy	1	12	20	32
13/10/2015	Friday, market day	12.15 – 12.30	Cloudy	2	101	130	231
13/10/2015	Friday, market day	12.35 – 12.50	Cloudy	3	13	11	24
13/10/2015	Friday, market day	12.55 – 13.10	Cloudy	4	97	84	181
13/10/2015	Friday, market day	13.15 - 13:30	Cloudy	5	85	76	161
13/10/2015	Friday, market day	13:35 – 13.55	Cloudy	6	136	112	248
13/10/2015	Friday, non-market day	14.00 – 14.15	Cloudy	7	36	40	76
13/10/2015	Friday, market day	14.45 – 15.00	Cloudy	1	12	18	30
13/10/2015	Friday, market day	15.05 – 15.15	Cloudy	2	80	65	145
13/10/2015	Friday, market day	15.35 – 15.55	Cloudy	3	18	16	34
13/10/2015	Friday, non-market day	16.00 – 16.15	Cloudy	4	60	75	135
13/10/2015	Friday, market day	16.20 – 16.35	Cloudy	5	35	67	102
13/10/2015	Friday, market day	16.50 – 17.05	Cloudy	6	78	55	133
13/10/2015	Friday, market day	17.10 – 17.25	Cloudy	7	32	18	50
30/01/2016	Saturday, farmer market day	09.00 - 09:15	Cloudy	1	8	5	13
30/01/2016	Saturday, farmer market day	09.20 – 09.35	Cloudy	2	25	36	61
30/01/2016	Saturday, farmers market day	09.50 – 10.05	Cloudy	3	20	34	54
30/01/2016	Saturday, farmers market day	10.20 – 10.35	Cloudy	4	45	52	97

30/01/2016	Saturday, farmers market day	10.40 – 10.55	Cloudy	5	55	42	97
30/01/2016	Saturday, farmers market day	11.00 – 11.15	Cloudy	6	89	74	163
30/01/2016	Saturday, farmers market day	11.20 – 11.35	Cloudy	7	33	24	57
30/01/2016	Saturday, farmers market day	11.40 – 11.55	Cloudy	1	11	8	19
30/01/2016	Saturday, farmers market day	12.00 – 12.15	Cloudy	2	8	16	24
30/01/2016	Saturday, farmers market day	12.20 – 12.35	Cloudy	3	134	122	256
30/01/2016	Saturday, farmers market day	12.40 – 12.55	Cloudy	4	71	31	102
30/01/2016	Saturday, farmers market day	13.00 – 13.15	Cloudy	5	98	46	144
30/01/2016	Saturday, farmers market day	13.20 - 13:35	Cloudy	6	98	67	165
30/01/2016	Saturday, farmers market day	13:40 - 13:55	Cloudy	7	91	58	149
28/06/2016	Tuesday, non-market day	09:05 - 09:15	Sunny	1	8	39	47
28/06/2016	Tuesday, non-market day	09:18 - 09:28	Sunny	2	14	33	47
28/06/2016	Tuesday, non-market day	09:29 - 09:39	Sunny	3	44	13	57
28/06/2016	Tuesday, non-market day	09:40 - 09:50	Sunny	4	60	73	133
28/06/2016	Tuesday, non-market day	09:51 - 10:01	Sunny	5	70	33	121
28/06/2016	Tuesday, non-market day	10:03 - 10:13	Sunny	6	44	60	104
28/06/2016	Tuesday, non-market day	10:15 - 10:25	Sunny	7	48	31	79
28/06/2016	Tuesday, non-market day	12:02 - 12:12	Sunny	1	18	19	37
28/06/2016	Tuesday, non-market day	12:16 - 12:26	Sunny	2	100	107	215
28/06/2016	Tuesday, non-market day	12:28 - 12:38	Sunny	3	63	43	106
28/06/2016	Tuesday, non-market day	12:39 - 12:49	Sunny	4	131	97	228
28/06/2016	Tuesday, non-market day	12:51 - 13:01	Sunny	5	73	91	164
28/06/2016	Tuesday, non-market day	13:04 - 13:14	Sunny	6	129	105	234
28/06/2016	Tuesday, non-market day	13:19 - 13:29	Sunny	7	48	22	70
28/06/2016	Tuesday, non-market day	15:04 - 15:14	Cloudy	1	19	12	31
28/06/2016	Tuesday, non-market day	15:17 - 15:27	Cloudy	2	101	72	173
28/06/2016	Tuesday, non-market day	15:29 - 15:39	Cloudy	3	17	20	37
28/06/2016	Tuesday, non-market day	15:40 - 15:50	Cloudy	4	62	35	97

28/06/2016	Tuesday, non-market day	15:51 - 16:02	Rain	5	40	20	60
28/06/2016	Tuesday, non-market day	16:05 - 16:15	Rain	6	60	55	115
28/06/2016	Tuesday, non-market day	16:16 - 16:26	Rain	7	16	15	31



Bromsgrove Town Centre Pedestrian Footfall 2015/16
Morning Peak 9am to 11am
Mid-day Peak 12pm to 2pm
Afternoon Peak 3pm to 5pm
Pedestrian Count (10 minutes)
300
250
200
150
100
50
0
1 2 3 4 5 6 7 1 2 3 4 5 6 7 1 2 3 4 5 6 7
Location Point
Thur
Fri
Sat

If you need this information in another language or format, please contact us to discuss how we can best meet your needs.

Phone: 01527 548284
Email: equalities@bromsgroveandredditch.gov.uk

Bromsgrove District Council
www.bromsgrove.gov.uk

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