

St. Matthew's Quarter – Relocation of Walsall Market

Final Report to

Walsall Council

September 2009

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1. INTRODUCTION

- 1.1 GVA Grimley has been appointed by Walsall Council to provide consultancy advice on the potential relocation of Walsall Market and the contribution that it makes to the vitality and viability of the town centre.
- 1.2 The Council had previously sought to relocate the market during 2008, but as a result of a legal challenge revoked the temporary planning permission for this in October 2008. In recognition of the previous threat of Judicial Review, the Council require authoritative and fully evidenced advice to guide their decision upon proposals for relocation of the market prior to the redevelopment of St Matthew's Quarter.
- 1.3 This report responds directly to the requirements of the consultancy brief (see Appendix 1) supplied by Council Officers.

Purpose of Study

- 1.4 There is currently a reinvigorated political desire to relocate Walsall Market to the area centred on The Bridge in Walsall Town Centre in advance of the critical Christmas 2009 trading period. One of the key objectives of this Study is to establish the evidential base to inform the decision to relocate the market.
- 1.5 To facilitate this process the consultant has identified three options for relocation and each has been assessed against a basket of agreed retail assessment (vitality and viability) criteria used for undertaking town centre health checks based upon PPS6 / draft PPS4 (Annex A) guidance. A range of other material considerations has also been taken into account in the assessment. The three options are:
- Option 1: the market to remain in its current location at Digbeth (see Figure 2.1);
 - Option 2: the market to be temporarily relocated (for a period of up to three years) to the area around The Bridge as proposed by the Council (Variant A) (see Figure 2.2); and
 - Option 3: the market to be temporarily relocated (for a period of up to three years) to a location that is a variant of the above Council option as developed in discussions with the consultants (Variant B) (see Figure 2.3).
- 1.6 An evidence base (gleaned from a collection of desk based and empirical work) has been created which has been utilised to inform the option evaluation exercise.

1.7 Having regard to the consultancy brief, detailed advice is provided on the following matters for all of the above options:

- The impact on the vitality and viability of the town centre, from both a retailer and development / investment perspective, if the current market were to remain in situ, or if it were to relocate from its existing position to an alternative position. This includes an assessment of the impact on the constituent parts of the town centre, including the area currently occupied by the market, the proposed location for the market and other parts of the town centre, including the Saddlers Shopping Centre and Park Street / The Bridge.
- The impact of the relocation of the market on the St Matthew's Quarter if the proposed redevelopment materialises or if the proposed redevelopment does not proceed;
- The impact upon the market itself, if it were to remain in its current location, or if it were to move to an alternative location, and an analysis of the relative importance of the market to the overall vitality and viability of the town centre under each scenario. This also includes reference to the different permutations of the proposed redevelopment of the St Matthew's Quarter proceeding.
- The various scenarios for the future of the market include a consideration of what operational market management arrangements should be put in place to make the town centre and the market attractive to investment, and what steps should be taken to minimise any adverse impact upon retailers and shoppers.
- The analysis is to be based upon town centre health check indicators as noted fully in PPS6: Planning for Town Centres, and Annex A of the consultation draft of PPS4: Planning for Prosperous Economies.
- The analysis is to be shaped through "soft market testing" discussions with a cross-section of retailers / major landowners / agents / developers / investment institutions who currently operate in the town centre, and also a cross section of those who are not currently represented in the town centre.

1.8 Further, the advice is provided within certain parameters, including:

- The current and predicted economic position to inform policy and actions now and in the future;
- Relevant planning policy at regional, sub-regional and local levels;
- Development proposals for Walsall Town Centre, those planned in competing town / city centres, and out-of-town locations;

- Reference to case study examples of similar market relocations which have impacted positively and negatively upon the vitality and viability of town centres;
- Review of previous work undertaken on the market's role and function, as well as financial and tenant management information;
- Engagement with key stakeholders; and
- Provide advice which is cognisant of Counsel's opinion on the relocation of the Walsall Market.

Report Structure

1.9 The remainder of this report is structured as follows:

- **Section 2** provides an overview of the background to this project and the relevant development history;
- **Section 3** summarises the planning policy context;
- **Section 4** provides an overview of the generic role of markets in town centres before focusing on the specific role and function of Walsall Market;
- **Section 5** provides a review of the performance of the town centre against the retail health check indicators, that measure vitality and viability, based on Annex A of draft PPS4;
- **Section 6** summarises the key findings from the stakeholder engagement process that has been undertaken;
- **Section 7** outlines the options that were assessed for the relocation of the market;
- **Section 8** explains the process undertaken to evaluate these options against an agreed set of assessment criteria; and
- **Section 9** draws together the conclusions and key recommendations.

1.10 The next section summarises the relevant background and development history of the environs around St. Matthew's Quarter and the existing Walsall Market

2. BACKGROUND AND DEVELOPMENT HISTORY

- 2.1 This section summarises the relevant background and development history of the area around St. Matthew's Quarter and the Walsall Market.

St. Matthew's Quarter

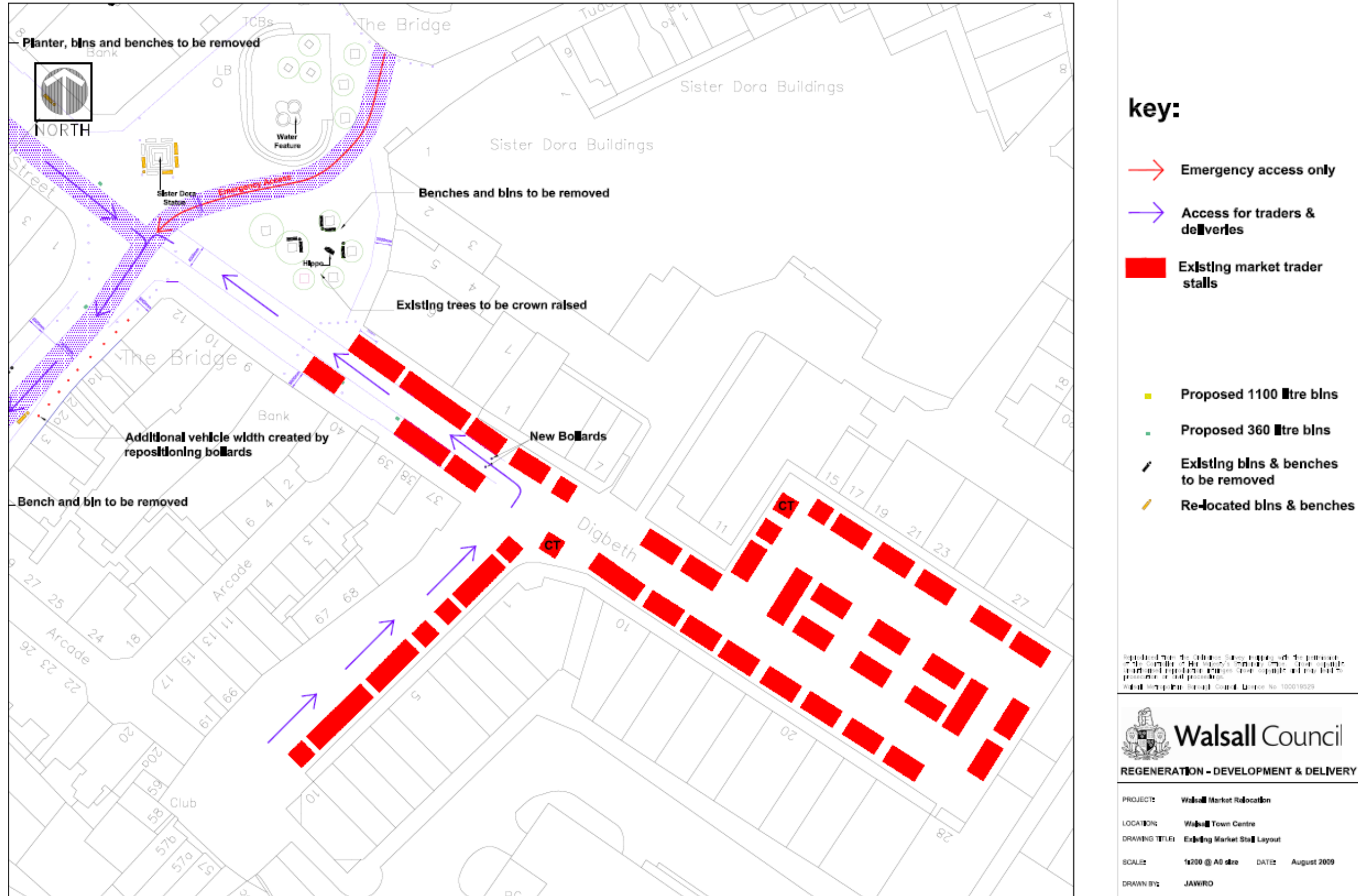
- 2.2 The St Matthew's Quarter in Walsall is a key area of the town centre where the Council and its partners continue to encourage retail-led investment. All of the St Matthew's Quarter is included within the primary shopping area designation of the Unitary Development Plan (UDP) (see Figure 3.1).
- 2.3 The area is envisaged as the focus for new comparison goods retail investment in the town centre, an improved street market and for an opportunity to improve the town centre's leisure offer. It is anticipated that development in the area will be delivered in a comprehensive manner and connect well with existing retail facilities to improve pedestrian circulation. An urban design brief has been developed to aid this process and to inform the level of high quality design and public realm expected in the St Matthew's Quarter. The grade II* listed St Matthew's Church, which gives the area its name, provides a key landmark that characterises the town centre's skyline.
- 2.4 The St Matthew's Quarter is divided by Digbeth / High Street which forms part of the main north-west to south-east axis upon which the town centre has developed. To the north of Digbeth is the Old Square Shopping Centre, owned by Threadneedle Property, and currently including Tesco (although they are shortly to relocate to the former Walsall College site) and Debenhams where separate proposals are being considered by the landowners for improvements. To the south of this axis is land owned primarily by Norton & Proffitt / St Modwen, with a lesser interest held by the Council. Walsall's historic outdoor market is located on the Digbeth / High Street axis, with some stalls based in Lower Hall Lane.

Phasing

- 2.5 In June 2007, the first phase of the St Matthew's Quarter redevelopment was realised with the opening of a new Asda supermarket, the largest town centre Asda store in the country. This development was accompanied by a 1,000 space multi-storey car park, a small number of ground floor retail units and 45 apartments.

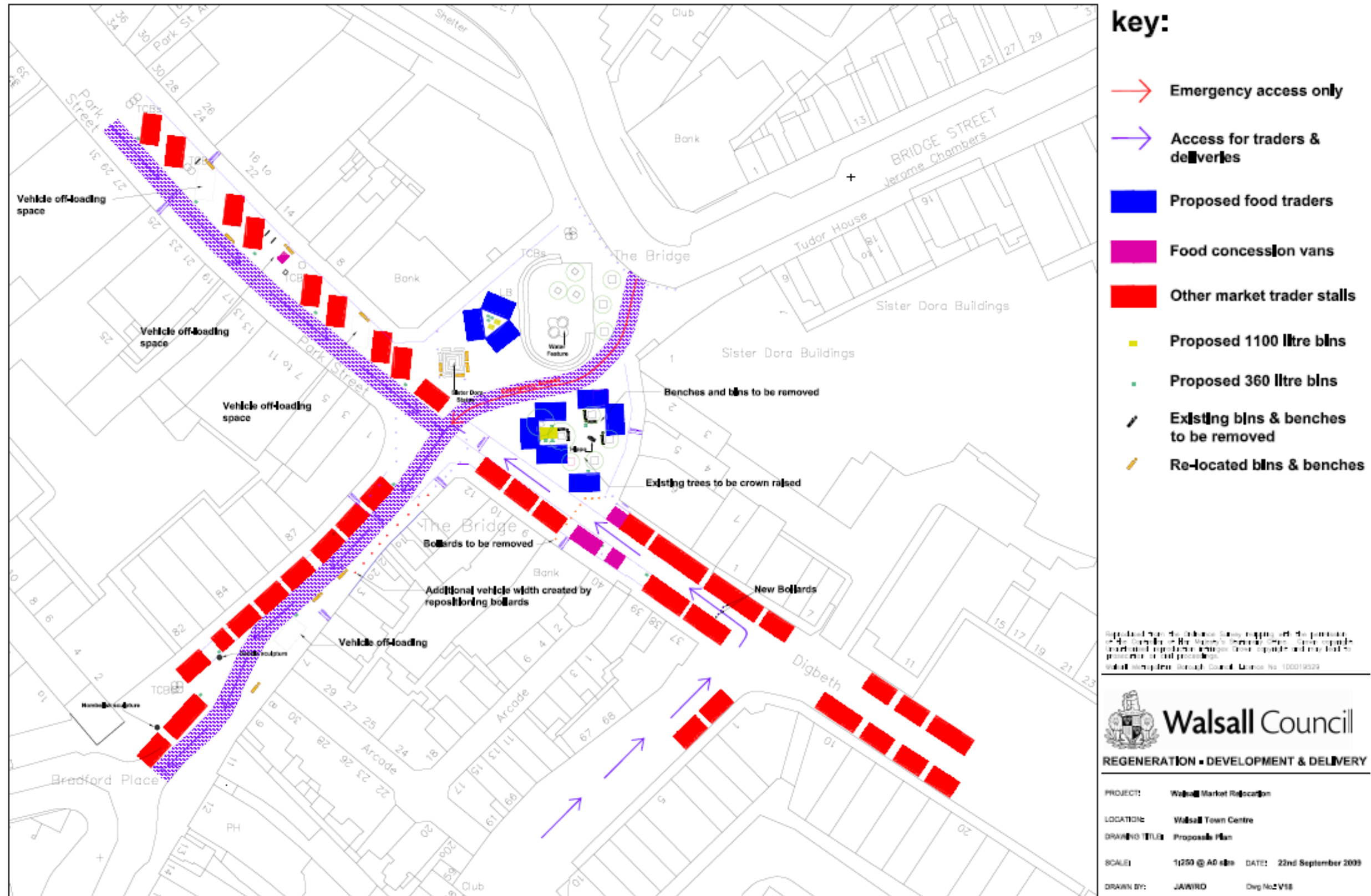
- 2.6 It was intended that Phase 2 of the St Matthew's Quarter development would be delivered in 2007/8 through the conversion of the listed Shannon's Mill building into retail units, offices and 41 apartments by landowner Norton & Proffitt/ St Modwen. Unfortunately, a fire destroyed the mill building in August 2007.
- 2.7 A Phase 3 of development was also planned which now faces delivery difficulties. This would have required part of the site occupied by the existing Walsall Market in Digbeth (Figure 2.1 overleaf shows its current location) and would have reprovided new stalls and associated infrastructure. However, given the new opportunity to consider a more comprehensive development solution, including George Street, Lower Hall Lane and Digbeth, there is currently no programme to deliver this wider scheme and therefore no identified location to which the market can be relocated.
- 2.8 In parallel with this redevelopment uncertainty, national trends, a deteriorating environment and falling profitability have contributed to a political decision to move the markets on a temporary basis to a more central location at The Bridge. This report evaluates (see Section 8) two locations in this vicinity where the market could be located (see Figures 2.2 and 2.3). However, this temporary move when proposed and approved by the Council in 2008, was threatened with Judicial Review by Threadneedle Property (the strategic asset managers of the Old Square Shopping Centre). They were concerned that the removal of the markets would adversely impact upon the attractiveness and viability of Old Square which will lose a key tenant namely, Tesco, when it relocates to a new store at the former Walsall College site in 2011.
- 2.9 Following the threat of legal action, Walsall Council consulted legal Counsel who advised that the temporary planning permission for relocation of the markets should be revoked (this was implemented in Autumn 2008). Moreover, Counsel has also advised that before any further planning application is submitted, a robust evidence base should be created to support the Council's case for temporary relocation of the market prior to implementation of the wider redevelopment. The collation of this evidence base has become urgent due to a political desire to relocate the Walsall Market to the area around The Bridge in advance of the important Christmas 2009 trading period.
- 2.10 The requirements of the brief are summarised in Section 1 of this report. This detailed assessment hinges, in part, upon the contribution that the market currently makes to the success of the town centre and also whether or not relocation of the market would have an overall positive or negative effect on the vitality and viability of the centre as a whole.

Figure 2.1: Option 1 – Market to remain in situ



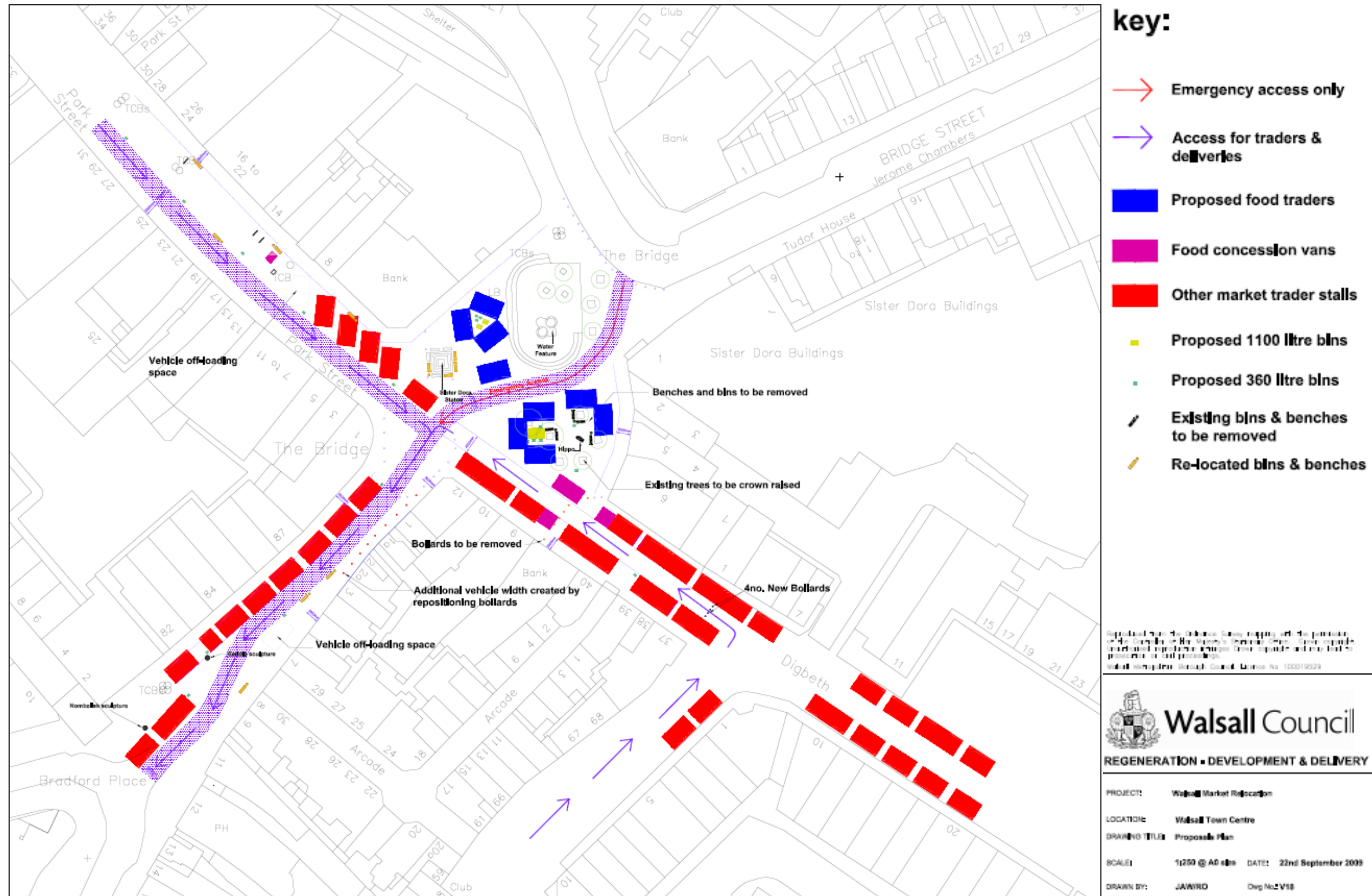
(Source: Walsall Council, 2009)

Figure 2.2: Option 2 – Market to relocate to the Bridge (Council Proposal - Variant A)



(Source: Walsall Council, 2009)

Figure 2.3: Option 3 – Market to relocate to the Bridge (Consultants revised Proposal - Variant B)



(Source: Walsall Council, 2009)

Walsall Market

- 2.11 Along with most retail markets across the country, Walsall Market has seen the number of stalls (currently at about 90 stalls on peak days) and therefore its income, decline significantly over recent years. This decline can be largely attributed to national trends, such as the growing influence of supermarkets and discount retailers, as well as the current economic downturn.
- 2.12 Local issues have, however, also been prominent in this decline, including the Shannon's Mill fire, which led to temporary road closures and disturbance whilst the Mill building was demolished, with similar temporary disturbance during the construction of the Asda store.
- 2.13 Uncertainty and lack of progress with the investment proposals for the wider St Matthew's Quarter redevelopment have also had an impact on the leasing of retail units fronting the market in its current location, leading to an overall deterioration in the environment of the St Matthew's Quarter, in particular, but also of the wider town centre.
- 2.14 The management regime of the markets service has also contributed to the decline in Walsall Market. This is discussed further in Sections 8 and 9, but in summary improvement is required for the overall market offer i.e. range of goods, town centre security, refuse collection, recycling and disposal, street cleansing, storage of goods, market upkeep and repair. The decline has had an impact on the overall profitability of the Markets Service (which also currently includes the management of markets in Bloxwich, Willenhall and Darlaston, and will soon include Brownhills Market). This has meant that corporate income targets for the Markets Service have not been achieved. Walsall Council are currently undertaking a review of the management of their Markets Service.
- 2.15 In order to tackle the decline in Walsall Market and to reverse the fortunes of one of the key elements of the town centre retail offer, and to maintain a coherent Markets Service which can provide some income, a political decision has been taken to support the temporary relocation of the market from its current position to a more central location within the town centre. This more central location has been proposed to concentrate facilities on The Bridge, with some stalls spreading in a crucifix pattern into Digbeth, Bradford Place and along some length of Park Street.
- 2.16 This report reviews this Council-led proposal as one of the potential options for the relocation of the market and also evaluates a variant of this scheme supported by the consultant. The analysis reviews the impact that these options will have on the vitality and viability of both the

St. Matthew's Quarter and the wider town centre offer. The next section summarises the relevant planning policy context.

3. POLICY CONTEXT

- 3.1 This section provides a summary of the relevant planning policy context that has been used to inform this Study.

National Planning Policy

Planning Policy Statement 1: Delivering Sustainable Development (2005)

- 3.2 PPS1 sets out the Government's overarching planning policies on the delivery of sustainable development. It requires local planning authorities to facilitate and promote sustainable and inclusive patterns of urban development by contributing to sustainable economic development, protecting the natural environment and ensuring high quality development through good design and the efficient use of land. It also seeks to ensure that development supports existing communities and contributes to the creation of safe, sustainable, liveable and mixed communities with access to good housing, jobs and key services for all members of the community.

Planning Policy Statement 6: Planning for Town Centres (2005)

- 3.3 PPS6 seeks to promote sustainable and inclusive patterns of development that contribute to the vitality and vibrancy of the town centre. The main aims of PPS6 are to promote social inclusion, encourage investment to regenerate deprived areas, and to ensure that local centres are accessible by a choice of transport options, especially public transport, walking and cycling, as well as by car. In addition, it seeks to encourage retail growth in town centres rather than in out of town locations. Where existing centres are in decline, local planning authorities should assess the scope for consolidating and strengthening these centres by seeking to focus a wider range of services there, promote the diversification of uses and improve the environment. PPS6 also identifies that street markets can make a valuable contribution to local choice and diversity in shopping as well as the vitality of town centres. PPS 6 states that Local Authorities should seek to retain and enhance existing markets to ensure that they remain attractive and competitive through investing in their improvement.

Draft Planning Policy Statement 4: Planning for Prosperous Economies (2009)

- 3.4 The new draft PPS4 incorporates the town centre and retail policy statements from PPS6 with the policies on economic development in urban and rural areas found in PPG4, PPG5 and

PPS7. The purpose of the merged guidance is to streamline national planning policy to create a coherent and comprehensive policy framework for planning for sustainable economic growth in urban and rural areas, especially in town centres.

3.5 Annex A of the draft PPS provides a series of town centre health check indicators. These are as follows:

- **A1** – Diversity of main town centre uses;
- **A2** – The amount of retail, leisure and office floorspace in edge of centre and out of centre locations;
- **A3** – The potential capacity for growth or change of centres in the network;
- **A4** – Retailer representation and intentions to change representation;
- **A5** – Shopping rents;
- **A6** – Proportion of vacant street level property and the length of time properties have been vacant;
- **A7** – Commercial yields on non-domestic properties;
- **A8** - Land values and the length of time key sites have remained undeveloped;
- **A9** - Pedestrian flows;
- **A10** – Accessibility;
- **A11** – Customer and residents views and behaviours;
- **A12** – Perception of safety and occurrence of crime; and
- **A13** – State of the town centre environmental quality.

Planning Policy Guidance 13: Transport (2001)

3.6 PPG13 encourages the creation of an integrated and sustainable transport network in order to lessen environmental impact, reduce growth in the length and number of motorised journeys and reduce reliance on the private car. The use of accessible sites, such as those located within town centres and close to transport interchanges should be maximised and developed intensively. Within town centres, significantly lower levels of off street parking should be provided as part of new development and walking, cycling and public transport should be encouraged instead.

Regional Planning Policy

West Midlands Regional Spatial Strategy (2008)

- 3.7 The West Midlands Regional Spatial Strategy (RSS) Phase 1 Revision was adopted in January 2008. It sets out a vision for the region until 2021, seeking to promote economic growth and sustainable development within the region.
- 3.8 A review of the West Midlands RSS is being undertaken in three phases, as follows:
- **Phase 1:** incorporating Black Country policies into the RSS. First stage revision published January 2008;
 - **Phase 2:** Includes housing and employment issues. The Examination in Public for Phase 2 of the RSS took place in spring 2009 and adoption is anticipated in early 2010; and
 - **Phase 3:** Includes environmental issues. The consultation on Phase 3 closed in August 2009.
- 3.9 The following policies set out in the WMRSS (Phase 1 Revision) set the context for assessing the role of Walsall town centre:
- **Policy UR1: Implementing Urban Renaissance – the MUAs** – Regeneration and urban renaissance is promoted in the Major Urban Areas (MUAs) which includes Walsall;
 - **Policy UR1A: Black Country Regeneration Priorities** – The primary focus for regeneration activity in the Black Country should be the four strategic centres, which includes Walsall, and the growth corridors;
 - **Policy UR1D: Retail Floorspace** – During the period 2004 – 2021, Walsall Metropolitan Borough Council (MBC) should plan for 45,000 sq m growth in comparison retail floorspace;
 - **Policy UR3: Enhancing the Role of City, Town and District Centres** – Town and city centres should play a leading role in urban renaissance in order to provide services for local communities, a sense of identity and drive economic growth. This should be achieved in a number of ways including maintaining, enhancing and underpinning the role of urban centres in terms of retail provision; and
 - **Policy PA11: The Network of Town and City Centres** – Walsall is identified as a Strategic Town Centre. Identified centres should be a focus for major retail developments (those of more than 10,000 sq m, excluding floorspace dedicated to the retailing of convenience goods).

Sub-Regional Planning Policy

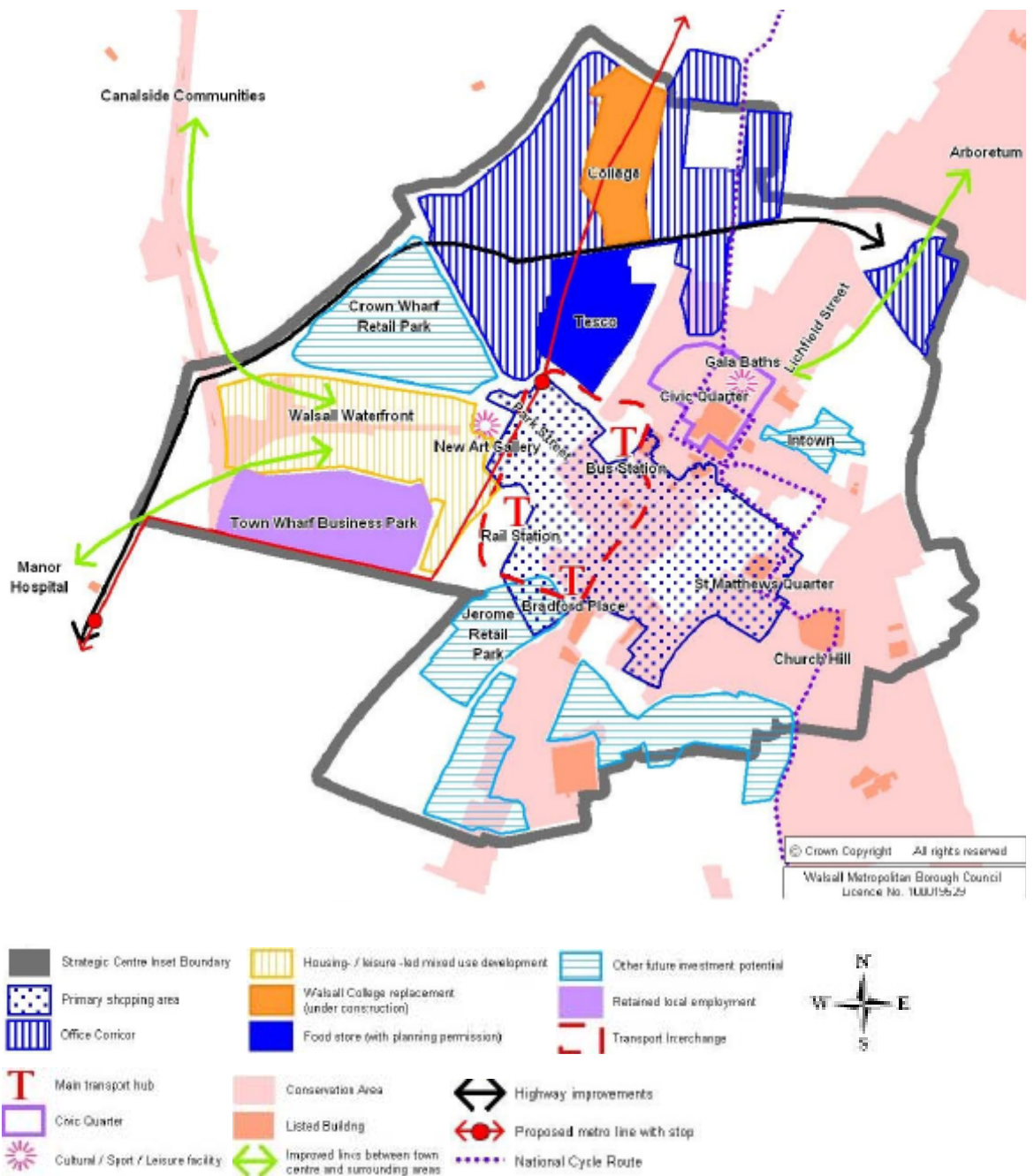
Black Country Joint Core Strategy (2008)

- 3.10 In March 2008, the Preferred Options document for the Black Country Joint Core Strategy (BCJCS) underwent a period of public consultation, which ended in April 2008. It is anticipated that a pre-submission document will be published at the end of November 2009 which will be consulted on until mid January 2010. Following this, submission to the Secretary of State is anticipated for February / March 2010. The Examination in Public is scheduled to take place in June 2010, with adoption in March 2011.
- 3.11 The Preferred Options BCJCS (the Core Strategy) will be the key statutory plan guiding urban renaissance in the Black Country in accordance with the RSS for the West Midlands. The BCJCS is the key document in the portfolio of planning documents for each local authority in the Black Country. It sets out the vision, spatial objectives, and a detailed spatial strategy for future development in the Black Country up to 2026 as well as providing detailed spatial strategies for areas of greatest change i.e. the Regeneration Corridors and Strategic Centres. It will facilitate considerable land use change across the Black Country.
- 3.12 Policies of particular relevance to the St Matthew's Quarter and wider study area are summarised below:
- **Core Spatial Policy Area 1: The Role of Strategic Centres** – Walsall is identified as one of four Strategic Centres. These centres should be the focus for large scale comparison retail and by 2026 will have provided 350,000 sqm gross new comparison retail floorspace; and
 - **Core Policy Area 26: Directing the RSS Comparison Retail and Office Development Requirements to the Strategic Centres** – Up to 2021, each of the strategic centres shall be encouraged to accommodate a proportion of the comparison retail floorspace identified in the RSS (45,000 sq m for Walsall).
- 3.13 The Proposals Map for Walsall Strategic Town Centre in the BCJCS Preferred Options is provided overleaf at Figure 3.1. It confirms St Matthew's Quarter as being part of the Primary Shopping Area. The Crown Wharf Retail Park is also identified as an area with future investment potential. The options identified for these two areas are as follows:
- **Primary Shopping Area** - This area is the focus for retail activity in Walsall Town Centre and contains a range of bars, restaurants and other leisure facilities, offices and residential apartments (on upper floors). The main retail areas are Park Street, Digbeth,

the Saddlers Centre and the Old Square. The preferred option for this area is to consolidate and improve the existing offer, including environmental improvements; and

- **Crown Wharf Retail Park** - This is a modern retail development that provides a complementary role to the town centre. The preferred option is for retailing to continue, but there is potential for further investment in the longer term to increase the density and range of activity.
- 3.14 The thrust of retail policy in the Primary Shopping Area, which is to consolidate and improve the existing offer including environmental improvements, is an important consideration in the decision to relocate Walsall Market to an alternative position.

Figure 3.1: Walsall Proposals Map



(Nb. Not to scale)

Source: BCJCS Preferred Options (2008)

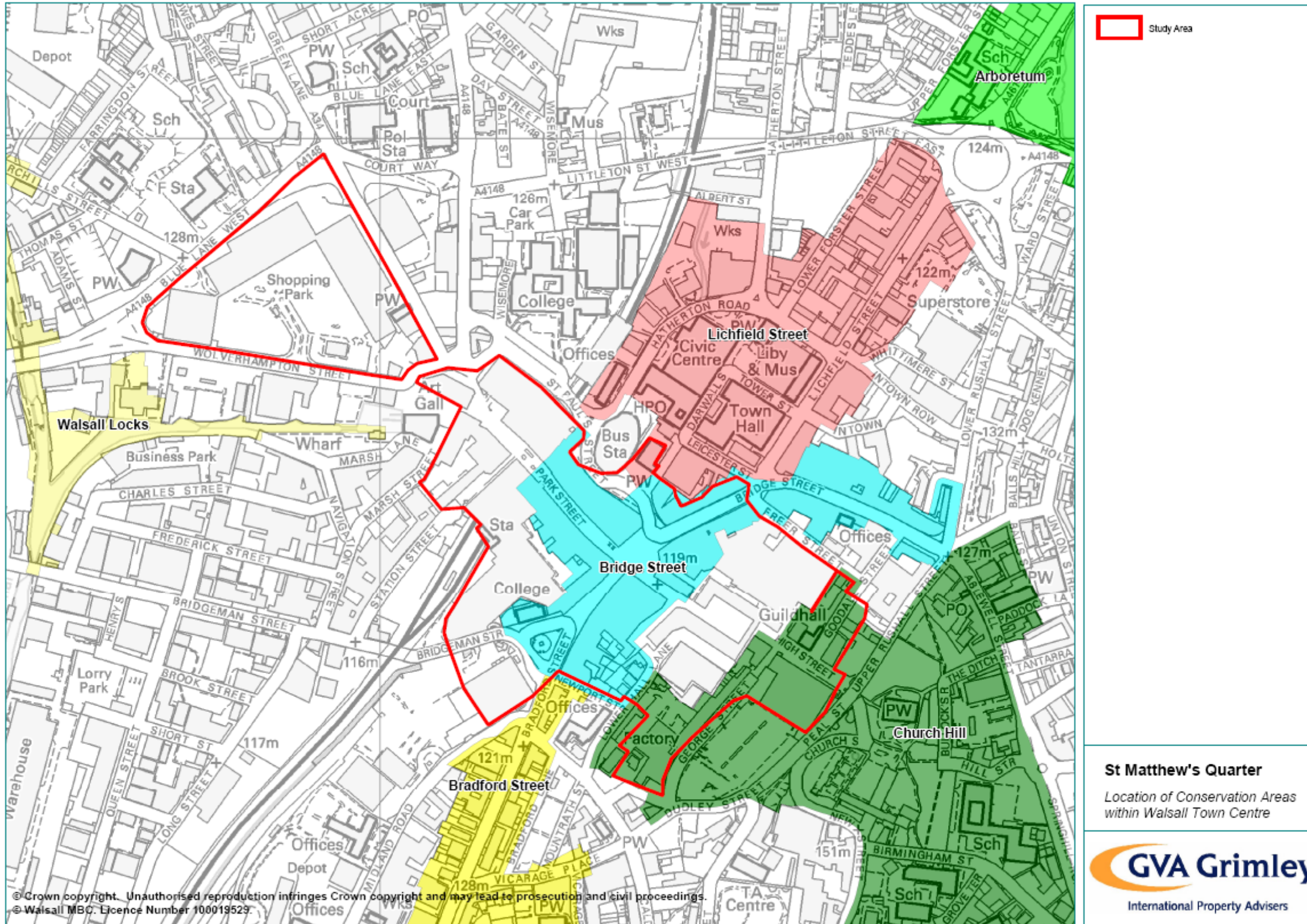
Local Planning Policy

Walsall Unitary Development Plan (2005)

- 3.15 The Walsall Unitary Development Plan (UDP) was adopted in 2005. Its policies were saved for three years until March 2008. At this time, only four of the UDP policies were deemed to have expired, the remainder have been saved until they are replaced by policies from the Local Development Framework (LDF).
- 3.16 UDP saved policies that are relevant to the St Matthew's Quarter and the wider study area are as follows:
- **GP 1: The Sustainable Location of Development** – Development will be encouraged in accessible locations, minimising the need to travel, especially by private car. These locations include within, or on the edge of town, district or local centres;
 - **GP 2: Environmental Protection** – All developments will be expected to make a positive contribution to the quality of the environment and the principles of sustainable development;
 - **GP 4: Local Area Regeneration** – Comprehensive local area regeneration initiatives will be encouraged where they revitalise the economy, help to sustain established centres, enhance the built environment, improve accessibility, improve the amenity offer, bring forward derelict land/ buildings and improve safety and security;
 - **GP 5: Equal Opportunities** – Development proposals should ensure that the needs of all sections of the community are properly taken into account, in particular those who are disadvantaged;
 - **GP 6: Disabled People** – Developments which the public have access to will only be permitted if they are designed to provide good access to disabled people;
 - **GP 7: Community Safety** – Proposals should have regard for the objective of 'designing out crime' through a number of measures including maximising surveillance, CCTV, a high standard of street lighting and security shutters;
 - **ENV 9: Environmental Improvement Initiatives** – Environmental Improvement Initiatives will be located in a number of locations including town centres. The Council will work with local communities and/ or partner agencies to identify environmental improvement schemes;

- **ENV 29: Conservation Areas** – The Church Hill Conservation Area and Bridge Street Conservation Area are relevant to the assessment of the market relocation options. Any development proposals will have to preserve or enhance the character and appearance of the Conservation Areas in terms of scale, massing, design and materials as well as any impact on traffic levels;
- **ENV 32: Design and Development Proposals** – Poorly designed proposals which do not take into account the context or surroundings will not be permitted. This policy has particular significance within a number of locations including a town centre, Conservation Area or a priority area for environmental improvement;
- **Policy S1: Definition of Town Centre Uses** - Town centre uses comprise the following: retailing of all kinds (convenience, comparison, warehouse clubs, retail outlets and retail markets), A2 (financial and professional offices), B1a (offices), A3 (food, drink and public houses), C1 and D1 (hotels, entertainment, leisure, sports) and D2 (community and health facilities) uses;
- **Policy S2: Hierarchy of Centres** – Walsall is identified as the 'Main Town Centre'. It will be sustained and enhanced in its sub-regional role offering comparison retail and other town centre uses. It is recognised that Walsall has a local role, meeting the needs of adjacent communities for convenience shopping and local amenities and services;
- **Policy S3: Integration of Design into Developments** – Town centre developments should be of a scale and nature appropriate to the size and function of the centre. They should also be sensitively integrated in functional and visual terms with the primary shopping area and other land uses;
- **Policy S4: Town and District Centres, General Principles** – The range and quality of shopping, leisure and other town centre uses will be sustained and enhanced. The priority will be to safeguard the existing level of shopping, leisure and other provision. In some centres there is scope to increase these uses to maintain their vitality and viability. Within the primary shopping area, the predominant ground floor use should be retail;
- **Policy WA1: Primary Shopping Area** – This area comprises Park Street / Digbeth / High Street and extends into Bradford Street, Bridge Street, Old Square and The Saddlers Centre. New retail floorspace will be concentrated within, and adjacent to, this area. Redevelopment schemes for the Digbeth area will be particularly encouraged;
- **Policy WA2: The Market** – The importance of the market is recognised as an attraction for visitors and its significant role in meeting the needs of the community. Where required, the Council will carry out improvements to the operation and setting of the market in order to maintain and increase its attractiveness;

Figure 3.2: Conservation Areas



(Source: GVA Grimley, 2009 based on Walsall Council plan, 2009)

- **Policy WA3: Other Town Centre Uses** – Outside of the primary shopping area, and on upper floors within it, offices, leisure, community uses and, in some cases, residential development will be permitted;
 - **Policy WA5: Conservation Areas and Areas of High Townscape Value** – A number of areas are identified as making an important contribution to the character and / or townscape of the town centre. Those that fall within the study area are: The Bridge (particular buildings, the overall scale and the ‘space’), Bridge Street (part of) and the east side of High Street. The Church Hill Conservation Area lies at the south-eastern end of the Study Area;
 - **Policy WA6: Community Safety – CCTV** – The Council will seek to extend the coverage of the Walsall Town Centre CCTV system;
 - **Policy WA7: Development / Investment Opportunities** – Six areas with significant development/ investment potential are identified. These include Lower Hall Lane/ Digbeth/ Old Square, the majority of which falls within the study area; and
 - **Policy WA10: Lower Hall Lane / Digbeth / Old Square** – Major comparison goods retail investment over the next five to ten years will be concentrated here. There are two significant opportunities as follows: the reconfiguration and refurbishment of the Old Square Shopping Centre; and the retention of historical frontages and buildings of architectural / historical value within Digbeth / Lower Hall Lane and George Street area.
- 3.17 Two key points can be drawn from analysis of UDP policy of particular relevance. First, the Primary Shopping Area is a focus for new retail floorspace, especially Digbeth / Old Square and Lower Hall Lane; and second the importance of the market is recognised and the Council accepts responsibility for improvements to the market operation and setting to enhance its attractiveness. The improvement of the market is thus founded in adopted UDP policy.

Designing Walsall Supplementary Planning Document

- 3.18 The Designing Walsall Supplementary Planning Document (SPD) was adopted in February 2008. It provides advice to developers on the design of all new types of development within the town. The following policies are relevant to the St Matthew’s Quarter and wider study area:
- **Policy DW2: Safe and Welcoming Places** – New developments should contribute to creating places where people feel safe through minimising opportunities for crime and making places feel welcoming;
 - **Policy DW4: Continuity** – Attractive spaces within new development should be defined or enclosed by buildings, structures and / or landscape. Consideration must be given to

the distinction between public and private space, accessibility of buildings and spaces and the existing urban structure;

- **DW5: Ease of Movement** – New development should contribute to creating places that are easily connected and safe to move through. It must prioritise the needs of pedestrians and encourage sustainable modes of transport such as cycling and public transport;
- **DW6: Legibility** - New development make a positive contribution to the identity of an area and maximise the potential to enhance local distinctiveness by making contributions to street furniture, lighting and signage;
- **DW9: High Quality Public Realm** – New development should ensure that it creates places by using high quality materials, public art and landscaping, as well as maximising ‘active frontages’ and minimising ‘dead frontages’; and
- **DW10: Well Designed and Sustainable Buildings** – New development should make a positive contribution to creating a comfortable, adaptable and sustainable built environment through carefully designed buildings, and the sustainable use of resources.

3.19 The SPD also provides ‘Local Character Guidance’ on St Matthew’s Quarter. The following opportunities are identified:-

- The opportunity to modernise the existing market to create an exciting 21st century offer;
- New retail development should reflect the spacing of medieval plot widths and re-instate the serpentine street along Digbeth;
- Creating a friendly sense of community and neighbourhood through design;
- High quality public realm creating a comfortable outdoor environment for pedestrians and shoppers; and
- Important views of St Matthew’s Church must be maintained and enhanced.

Conclusion - Policy Implications

3.20 It is evident that retention and improvement of the Walsall Market has support in both national policy guidance (at a general level) and, specifically, in local planning policy. Policy WA2 in the Walsall UDP seeks to secure improvement in the market, albeit the supporting text assumes this would be in its existing location in Digbeth / High Street. The policy also references the need to enhance Old Square and the St Matthew’s Quarter given they provide the setting for the market.

3.21 The objectives of this policy are that the market should be improved to maintain and increase its attractiveness. This will provide benefits which will:

- (a) Enhance the vitality of the town as a whole;
 - (b) Increase the attraction of the Old Square area of the town centre to visitors and maintain footfall; and
 - (c) Meet the needs of the local community.
- 3.22 We note that there is nothing in the policy which would resist relocation of the market provided the objectives above are satisfied. The primary aim of the policy is to recognise the role of the market and to secure improvements to it. Thus whilst, when drafted, the policy anticipated the market would remain in its traditional location, there is no specific policy provision requiring this to happen. It follows that a planning justification is needed to support the proposal for relocation – which is essentially the reason why this report has been commissioned. These policy considerations are explored further in Section 8.
- 3.23 The next section provides an overview of the role that markets play in town centres and assesses the specific role and function of the Walsall Market.

4. THE ROLE AND FUTURE OF WALSALL MARKET

- 4.1 This section provides an overview of the challenges markets are currently facing nationally; considers whether any lessons can be learned from the operation of other markets, both locally and further afield; explores the role, function and character of the Walsall Market; and finally investigates the trading position of the market in the context of the relocation proposals.

The National Picture

- 4.2 The Walsall Market is typical of many market operations across the country in that its viability is declining. There is widespread evidence that markets are experiencing falling occupancy accompanied by falling revenues and increasing costs. This is due to two main factors. Firstly, generally speaking, council operated markets under-perform because they are poorly managed and starved of investment. Secondly, unlike the major discount supermarkets, market traders lack basic business planning and retail presentation expertise. This means that they are finding it increasingly difficult to compete, particularly as the large supermarket chains fight harder to maintain market share in the current recession.
- 4.3 The major supermarkets totally dominate the UK groceries sector, and are now making significant inroads into the non-food sector. They have introduced a number of “budget lines” which are aimed at the cost conscious shopper, but still carry the retailers brand guarantee. Similarly, in the clothing and shoe industries, the emergence of Matalan, Primark, TK Maxx, New Look, as well as the larger supermarkets own designer ‘budget’ labels, such as George (Asda), TU (Sainsbury’s) and Florence & Fred (Tesco) are offering discount priced clothing, but with a known household ‘name tag’.
- 4.4 Some markets have adapted to these changes, and have increased in popularity by introducing ‘farmers markets’, and European style markets (French, German etc) selling specialist items not necessarily found in high street shops, and antiques / bric-a-brac for customers looking for something different. Other markets have responded by improving management and carrying out improvements to help weather the economic downturn. Nevertheless in broad terms, unless market traders respond to these challenges positively, falling sales turnover and profitability will lead to reducing rent rolls and increasing vacancy rates. Without action, markets such as that at Walsall will start to disappear from our towns as competition increases.
- 4.5 It is important to recognise that this outcome could have a substantial adverse impact upon the potential for social inclusion. Walking around almost any market, and Walsall is no

exception, will confirm that less privileged sections of society, including the lower paid, elderly and less mobile, rely on the presence of a market and the value for money they provide, in relation to purchase of vital items at a price that they can afford. This social provision is a key reason for council support for market provision, alongside the increased diversity and vitality that a well-run market can introduce to a town centre.

Market Comparisons

- 4.6 The consultant has been provided with a paper prepared by Walsall Council officers following visits to a number of outdoor / indoor markets, both locally in the Black Country and elsewhere in the country. The results of this survey work are provided in Appendix 2, and are summarised in Table 4.1 below.

Table 4.1 – Results of Walsall Council Survey of Market

Market Location	Operator	Size	Number of Days Open	Comments
Lichfield outdoor market	Council	Up to 53 stalls	3 days	Trade good – full capacity, no redevelopment plans.
Wolverhampton City Centre outdoor market	Council	63 stalls	5 days	42% occupancy – trade reasonable despite recession. Improvements undertaken.
Bilston outdoor market	Council (Sunday private)	117 stalls	5 days	60% occupancy – trade reasonable despite recession.
West Bromwich outdoor market	Council	76 stalls	6 days	Trading difficult – occupancy levels declining year on year. Options for improvement under review.
Wednesbury outdoor market	Council	70 stalls	3 days	Trading difficult – occupancy levels declining year on year. Options for improvement being considered.
Worcester (Crown Gate) outdoor market	Privately operated	44 stalls	6 days	Reasonable occupation – trade down due to recession.
Chesterfield outdoor market	Council	240 stalls	3 days	61-65% occupancy – stable. Improved 5 years ago.
Wakefield outdoor market	Council	45 stalls	5 days	Full capacity except on Mondays. Outdoor market improved as part of new indoor market site in 2008. Market will relocate into new regeneration scheme in due course.
Chester indoor market.	Council	30 shops units, 60 B units and 60 stalls	6 days	75% occupancy of stalls. Some shops empty. In 2008 redevelopment plans for market dropped due to

Market Location	Operator	Size	Number of Days Open	Comments
				economic climate. Aiming to reinvigorate proposals.
Warrington indoor market	Council	250 stalls	6 days	75% occupancy rate. Trade falling. No plans for regeneration / improvement.

(Source: GVA Grimley, from Walsall Council Survey 2009)

4.7 It is difficult to draw definitive conclusions from this research, but several broad issues can be identified as follows:

- Save for one (Worcester, Crown Gate market), all of the markets are council run;
- Sizes vary from 53 (Lichfield) to 250 stalls (Warrington indoor market). This compares with around 90 stalls at Walsall market;
- The majority of the markets operate for five or six days;
- Roughly half of the markets are finding trading conditions challenging, with occupancy rates declining year on year. There are mixed messages emerging from the local market competition to Walsall – despite low occupancy rates, Wolverhampton and Bilston are seeing stable trading conditions; in contrast West Bromwich and Wednesbury markets are suffering declining occupancy levels year on year; and
- Where trading levels are under pressure, local authorities are responding with plans for improvements (e.g. West Bromwich, Wednesbury, Chester). It is difficult to correlate market improvements with increased trading from the survey data, although there is evidence from Wakefield for example, that this market is popular and at full capacity, which may reflect improvements carried out in 2008.

4.8 As described earlier, falling trading levels and occupancy rates will reflect a combination of national trends (in particular, growing competition from supermarkets and budget stores selling discounted goods), and the need for greater investment and better management from local authorities to enhance the competitive position of markets in their control. In all cases, it is evident that the local authorities in question view their markets as key components in maintaining diversity and vitality in their town centres, whilst also playing a key role in providing value for money products to low wage, elderly and less mobile sections of the local community, an important benefit in terms of the social exclusion agenda. This rationale mirrors that adopted by Walsall Council in the context of their current proposals to relocate and improve the town's market.

Walsall Market – Its Role and Function

- 4.9 The market is currently located in the square on Digbeth and High Street. It contains around 90 stalls and trades on Monday / Tuesday / Wednesday / Friday / Saturday. Produce for sale includes CD/DVD's, fresh fruit and vegetables, household goods, books, small electrical equipment, kitchenware, shoes, sweets, toys, plants and toiletries. Hot food and even services such as fortune telling are also offered. There are a large number of second hand goods for sale, as well as 'exchange' activities (e.g. for DVDs) reflecting the requirements of key customers.
- 4.10 The market generally sells low cost (mainly unbranded) products and consequently attracts shoppers seeking value for money items. The market trades from fixed stalls and emergency access / servicing is provided from adjacent streets, principally Lower Hall Lane.
- 4.11 The consultant has not had direct access to individual market traders profit and loss information, but anecdotal evidence from the Chair of the Market Traders Association indicates a range of turnover from around £100 to over £1000 per day. At the low end of this range, clearly the businesses are unviable once rents and other business overheads are taken out. At the higher end, the traders in this category are making a reasonable living. We would assume from the information made available to us that an average level of daily revenue for market traders would be in the region of £400-500, once all overheads have been taken into account.
- 4.12 The 2004 householders survey for Walsall (Walsall Council) indicates a turnover figure of circa £349m for comparison goods per annum in the town centre. Based on the average income per stall highlighted above, we calculate an annual turnover of circa £8m for Walsall market as a whole. This is some 2% of the annual comparison goods expenditure in the town (this figure ignores any food sector expenditure). Whilst this comparison is at a very general level, nevertheless, it serves to provide a broad indication of the scale and importance of the market when compared with the turnover within the wider town centre (i.e. there is a need to recognise that whilst relocating the market is important to maintain its viability, it is also important to protect the rest of the town centre from any significant adverse impacts on trading performance as a consequence of the move). This comparison, whilst helpful, of course does not reflect other non-financial considerations, including the social inclusion and retail diversity considerations made elsewhere in this section.

The Current Trading Position of Walsall Market

4.13 There is little doubt that Walsall Market is declining. It has seen a number of stalls (currently at around 90 at peak times) decline substantially over recent years, and hence income has reduced commensurately. Earlier in this section, we described the national trends, principally arising from the growing competition from supermarkets that have, in conjunction with the economic recession, hastened this decline. Walsall Market has suffered significantly in recent years, with low cost retail operators in the town (of which there are a number) competing strongly with market traders for patronage.

4.14 This decline has equally been exacerbated by local issues. The letter from the Walsall Market Traders Association, dated 24th October 2008 explains their perspective on the decline.

“Over the last few years, the decline has been gaining momentum, which began with the loss of 30 stalls from the Market Hill due to the closure of the Sainsbury supermarket. This was followed shortly with the closure of their car park, and the loss of around 300 spaces, the latter producing a dramatic drop in footfall for the market, this we have never recovered from. It was then followed by the demolition of the supermarket, and the building of the new Asda store, this taking some three years. As if this not enough, the unfortunate Shannons Mill fire completely devastated the area and the knock-on effect to the market was almost catastrophic (sic)”.

4.15 It is evident that temporary disruption arising from the consequences of the Shannons Mill fire and the building of the Asda store have adversely affected trading at the market. Uncertainty and lack of progress in the implementation of the St Matthews Quarter redevelopment has also had an unwelcome impact upon the letting of retail units fronting the Market Square. Management and operation of the market could also be improved significantly, with evidence of poor rubbish collection and street cleaning, causing further deterioration in the setting of the market, and the appearance of the Digbeth area of the town centre.

4.16 The overall result has been that the area occupied by the market does not attract the high footfall that the market requires to trade successfully. With the exception of Asda – which attracts primarily car borne shoppers – there are few ‘anchor’ activities which generate passing trade in this locality. Add to this the deteriorating environment and public realm, there is little to attract potential customers to this area, apart from the market itself.

4.17 It follows that radical action is required to improve the profitability of the Walsall Market. Without a pro-active response, the continuing economic downturn, negative national trends and local concerns (highlighted above) will all drive further market traders away from Walsall

to other more viable pitches elsewhere, or alternatively out of business altogether. The Council's Market Service advises that action is required immediately if the revenue from the hugely important Christmas trading period is to be maximised. The Council has commissioned work through consultants Quarterbridge to make recommendations on financial and business planning matters affecting the markets. However, from our site inspections and discussions with key stakeholders (see Section 6), we would endorse the urgent need to address the issues identified, and the requirement to implement appropriate plans to address them.

Conclusion

- 4.18 On the basis of this assessment it is concluded that Walsall Market plays a relatively small (in financial terms) but nevertheless vital role in maintaining the health of the town centre by virtue of its social inclusion role and the benefits it brings in terms of greater vibrancy and diversity. However, the effective management and operation of the market will be key going forward to ensure that its viability is maximised and that the effects of management and control do not detract from the wider quality and appearance of the town centre retail 'offer' as a whole. These matters are discussed further in Section 8 of this report.
- 4.19 The next section provides a review of the performance of the town centre against the retail health check indicators found in national guidance.

5. TOWN CENTRE HEALTH CHECK (VITALITY AND VIABILITY) ASSESSMENT

5.1 This section assesses the performance of the town centre when tested against the health check indicators (A1 etc) as outlined in PPS6 and Annex A of draft PPS (see Table 5.1). We have sub-divided these indicators into five groups as indicated below and consider each category in turn below.

Table 5.1: Indicators for Town Centre Vitality and Viability Health Check Assessment

Ref	Sub-Heading and Indicators
Retail Hierarchy and Catchment	
A1	Diversity of main town centre uses
A2	The amount of retail, leisure and office floorspace in edge of centre and out of centre locations
Growth Prospects and Retail Demand	
A3	The potential capacity for growth or change of centres in the network
A4	Retailer representation and intentions to change representation
Performance of the Town Centre	
A5	Shopping rents
A6	Vacancies
A7	Commercial yields
A8	Land values
Town Centre Movement	
A9	Pedestrian flows
A10	Accessibility
Town Centre Perceptions	
A11	Customer and residents views and behaviours
A12	Safety and occurrence of crime
A13	State of the town centre environmental quality

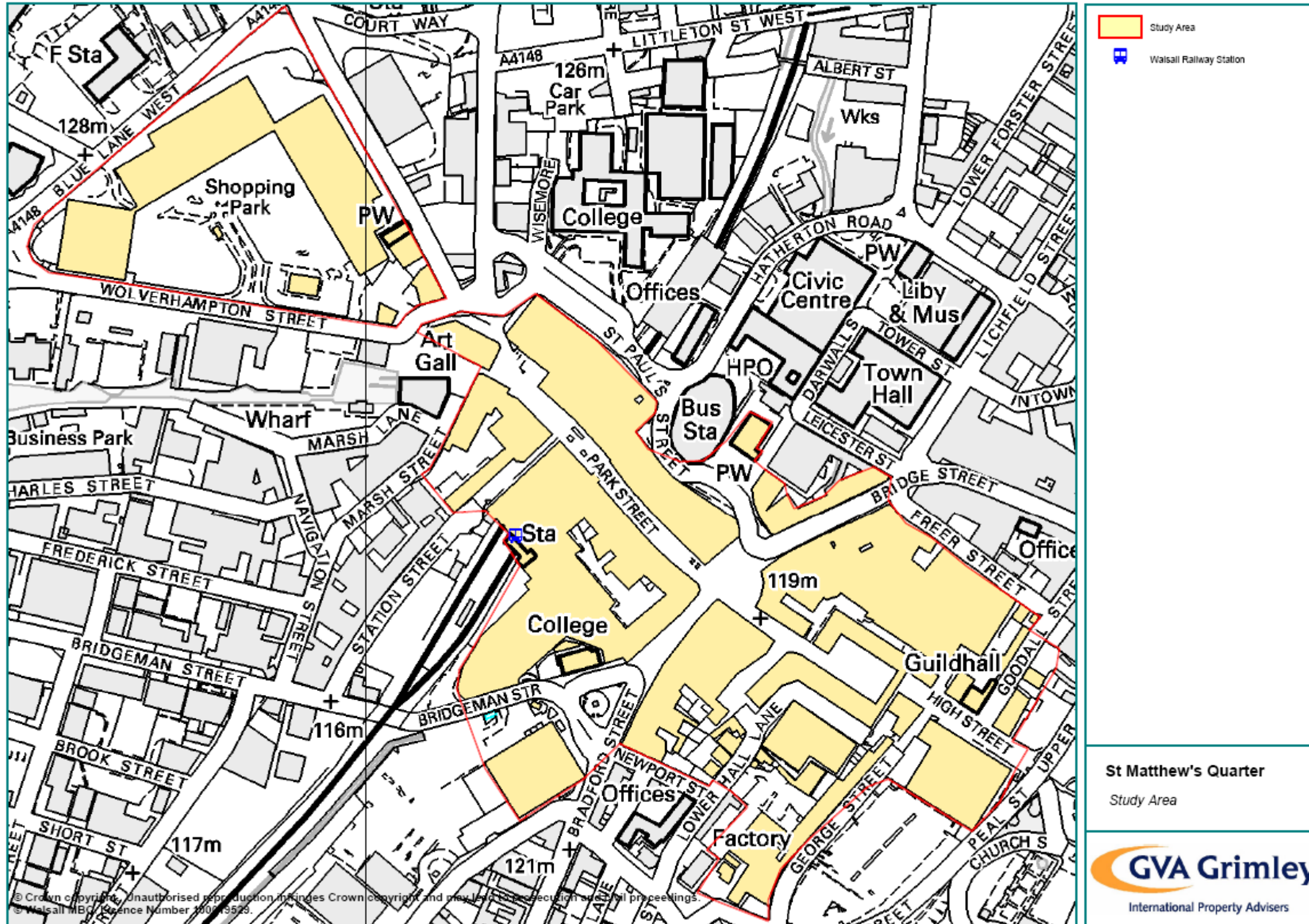
Source: Draft PPS4 Annex A (2009)

5.2 Using the above indicators the consultant has drawn together the baseline information that has been gathered to inform this Study, in particular the assessment of the overall vitality and viability of the centre. In collating and analysing this data we have supplemented existing centre information (especially health check indicators) with empirical data from site surveys. As previously discussed it is recognised that it is essential that this evidence base provides authoritative conclusions and is, as a result, capable of resisting forensic legal examination.

Study Area

5.3 The boundary of the study area for the analysis was agreed with the client group at the inception meeting for the work held on 27th August 2009. This is shown in Figure 5.1 overleaf and incorporates the Primary Shopping Area as identified in the UDP, plus the Crown Wharf area.

Figure 5.1: Study Area



(Source: GVA Grimley, 2009)

Retail Hierarchy and Catchment

- 5.4 Walsall serves an extensive primary catchment area that includes most of the Borough, extending to Cannock in the north and to the edge of West Bromwich to the south. According to the PROMIS Live Retail Report (June 2009) the primary catchment area has a total population of 411,000 which is above the major town average of 262,000 (2008).
- 5.5 The Walsall population is one of the least affluent of the PROMIS catchments ranking 175th out of 200 centres and is below the major town average. There are however variations in the area with some areas being less affluent and some more prosperous.
- 5.6 The estimated shopping population of those who use the town as their major shopping destination is 209,000 which is above both the PROMIS average of 186,000 and the CBRE Shopping Population (2006) Report average of 148,000. Walsall is projected to see a modest decline in population up to 2013 which may impact upon the size of the catchment area.

The Town Centre

Overview

- 5.7 Town centre retail floorspace is estimated at 133,000 sq m (1.22 million sq ft) (PROMIS August 2009), which is above the major town average.
- 5.8 Walsall's retail provision is not extensive and is fairly mainstream. Up-market and speciality retailing is limited, although there are a few independent speciality retailers concentrated in Digbeth Arcade, which is located off Bradford Street.
- 5.9 Walsall has a slightly below average volume and quality of retail provision relative to the size and affluence of the shopping population.

The Retail Offer

- 5.10 The town has a below average proportion of managed floorspace according to PROMIS with around 27% taken by three managed shopping centres of the Saddlers, Old Square and Park Place.
- 5.11 The prime pitch in Walsall, which commands the top Zone A rentals, includes pedestrianised Park Street from The Bridge to Station Street.
- 5.12 The town has a relatively compact central shopping area, comprising three principal streets - Bradford Street, High Street and Park Street - all of which radiate outwards from The Bridge, a

central pedestrianised area. These provide the secondary retail offer. Bradford Street has a few national multipliers (e.g. Birthday and Show Zone), with the majority of occupiers being local/ independent traders.

- 5.13 Walsall's sole department store is Debenhams, which trades on two floors in Old Square Shopping Centre. Concessions within this store are primarily mainstream fashion retailers. Key variety stores in the town are Bhs and Marks & Spencer; the former Littlewoods unit is now occupied by New Look and the former Woolworths unit by TJ Hughes.
- 5.14 Convenience provision in the town was boosted by the arrival of the 11,338 sqm (122,000 sqft) Asda store at the end of the High Street in 2007. There is also a large Tesco Metro Store in the Old Square Shopping Centre, but this will relocate by 2011 to an edge of town location at the former Walsall College site.

Town Centre Uses

- 5.15 We have undertaken an analysis of the floorspace occupied within the Study Area, which has been split into Use Classes A1-5, as follows (Table 5.2):

Table 5.2: Use Classes Order (A Class)

Use Class	Use / Description of Development	Permitted Change
A1 Shops	The sale of goods (other than hot-food) to the public: shops, post offices, travel agencies, ticket agencies, hairdressers, funeral directors, undertakers, domestic hire shops, dry cleaners, internet cafes, sandwich bars (where cold food is to be consumed of the premises).	No permitted change
A2 Financial and Professional Services	Financial services: banks, building societies, and bureau de change. Professional services (other than health or medical): estate agents, employment agencies, betting shops, other services it is appropriate to provide in a shopping area.	A1 (where there is a ground floor display window)
A3 Restaurants & Cafes	Restaurants & cafes (i.e. places where the primary purpose is the sale and consumption of food and drinks on the premises).	A1, A2 or A3
A4 Drinking Establishments	Public house, wine bar or other drinking establishments (i.e. premises where the primary purpose is the sale and consumption of alcoholic drinks on the premises).	A1, A2 or A3
A5 Hot Food Take-Away	Take-aways (where the primary purpose is the sale of hot food for consumption off the premises).	A1, A2 or A3

Source: The Town and Country Planning (Use Classes) Order 1987 and the Town and Country Planning (Use Classes) (Amendment) (England) Order 2005.

- 5.16 The output of this analysis is presented below in Tables 5.3 and 5.4 below:

Table 5.3: Floorspace occupied by Town Centre Uses (by Use Class)

Location	A1 Sq m	A2 Sq m	A3 Sq m	A4 Sq m	A5 Sq m	Other (non- retail) Sq m	Vacant Units Sq m
Crown Wharf Retail Park	16,694	-	409	-	-	-	-
Park Street (excl Saddlers Centre & Quasar Centre)	12,327	1,143	-	149	697	-	911
Quasar Centre	7,608	-	-	-	-	-	325
Saddlers Centre	11,817	-	2,700	-	-	-	818
Rear of Park Street	177	19	46	-	-	465	242
Station Street	502	102	-	-	-	-	-
The Bridge / Bridge Street (inc Tesco)	6,243	2,434	-	1,100	-	92	622
Bradford Street / Bradford Place (excl Bradford Arcade)	6,847	381	-	427	-	102	818
Digbeth Arcade	1,115	-	111	-	-	-	381
Digbeth (inc Market Store)	2,926	102	-	-	-	576	6,391
Lower Hall Lane	548	-	84	-	93	-	855
High Street (inc Asda)	80,400	-	557	539	46	-	316
George Street (excl Asda)	446	-	-	-	-	-	9,500
Goodall Street	520	37	251	-	-	279	539
Old Square Shopping Centre (excl Tesco)	4,822	74	-	-	381	177	957
Total	152,992	4,292	4,158	2,215	1,217	1,691	22,675

(Source: GVA Grimley, 2009)

Table 5.4: Town Centre Uses - % split by Use Class (Source: GVA Grimley, 2009)

Location	A1	A2	A3	A4	A5	Other (non- retail)	Vacant Units
Crown Wharf Retail Park	98%	-	2%	-	-	-	-
Park Street (excl Saddlers Centre & Quasar Centre)	80%	8%	-	1%	5%	-	6%
Quasar Centre	96%	-	-	-	-	-	4%
Saddlers Centre	77%	-	18%	-	-	-	5%
Rear of Park Street	19%	2%	5%	-	-	49%	25%
Station Street	83%	17%	-	-	-	-	-
The Bridge / Bridge Street (inc Tesco)	60%	23%	-	10%	-	1%	6%
Bradford Street / Bradford Place (excl Bradford Arcade)	80%	4%	-	5%	-	1%	10%
Digbeth Arcade	69%	-	7%	-	-	-	24%
Digbeth (inc Market Store)	29%	1%	-	-	-	6%	64%
Lower Hall Lane	35%	-	5%	-	6%	-	54%
High Street (inc Asda)	98%	-	0.7%	0.7%	0.2%	-	0.4%
George Street (excl Asda)	4%	-	-	-	-	-	96%
Goodall Street	32%	2%	15%	-	-	17%	34%
Old Square Shopping Centre (excl Tesco)	75%	1%	-	-	6%	3%	15%
Total	80%	2%	2%	1%	1%	1%	13%

- 5.17 Table 5.3 shows that there is a total of 190,932 sqm (2.05 million sqft) of unit floorspace within the study area (including both the identified Primary Shopping Area and the Crown Wharf Retail Park). Of this unit floorspace, 80% is occupied by Use Class A1 (shops). 13% of the total unit floorspace in the study area is currently vacant (see Table 5.4).
- 5.18 The Crown Wharf Retail Park, Park Place Shopping Centre (formerly the Quasar Centre), and the High Street all have a unit floorspace which is over 95% occupied by Use Class A1 activities. However, in the case of both the Park Place Shopping Centre and the High Street, these figures are dominated by single large units, namely Wilkinson's and Asda respectively.
- 5.19 The area with the largest amount of A2 (Financial and Professional Services) floorspace is the Bridge and Bridge Street area with 23% of its floorspace falling within this Use Class. This area also has the largest amount of A4 (drinking establishments) floorspace with 10% of unit floorspace falling within this Use Class.
- 5.20 The Digbeth Area and Lower Hall Lane have the greatest amount of vacant unit floorspace (64% and 54% respectively). However, the figure for the Digbeth area is increased by the large vacant market store unit which we understand has been condemned by the Council and is unfit to be let. Both Crown Wharf Retail Park and the Station Street area currently have no vacant units.
- 5.21 The Saddlers Centre contains the highest proportion of Use Class A3 (restaurants and cafes) floorspace with cafes occupying some 18% of the total space. Lower Hall Lane contains the largest amount of Use Class A5 (hot food take-away) floorspace with 6% (due mainly to the presence of a large fish and chip shop).

Edge of Centre Uses

- 5.22 Whilst the client group confirmed at the outset that this analysis should only include the retail and leisure uses at the M6, J10 Retail Park, it should be noted that the Borough of Walsall boasts a high proportion of out of town retail, largely located along the M6 corridor at, or between J9 and 10 which in certain sectors provide significant competition to the town centre's retail offer.

Retail Warehousing

- 5.23 According to PROMIS (August 2009) there is a supply of 134,758 sq m (1.45 million sq ft) of retail warehousing space which is above the average provision per household for comparator towns. Most goods categories are over represented i.e. electrical, furniture and fashion whereas goods for sport, children and DIY are under represented. Around 58% of total retail

warehousing floorspace in the Walsall area is on retail parks which is above the average of 51% for major towns generally.

- 5.24 The largest concentration of retail warehousing 46,468 sq m (500,000 sq ft) in the area is located at Axletree Way at Junction 9 of the M6. Key occupiers include Next, Curry's and PC World. In addition, IKEA and B&Q trade from large, nearby stores.
- 5.25 Other locations / occupiers of note in the area include Broadway Retail Park (Halfords, JJB Sports, Matalan, Pets at Home etc), Reedswood Retail park (Dunelm, Focus, Matalan and Lidl), Keyway Retail Park (Staples, Blockbuster and Burger King).

Leisure Parks

- 5.26 Leisure park provision is limited to that provided at J10. Table 5.5 below identifies the retail uses located at J10.

Table 5.5: Uses at M6, J10 Retail Park

Type	Occupiers
Retail	Marks and Spencer Outlet Store; Boundary Mill Store; Chiquitos Restaurant; BB's Coffee Shop; Cinnamon Court and one vacant shop to let
Leisure	Showcase Cinema and Grovesnor Casino
Industrial	Boltlight Hydraulic Bolt Tensioning; Telenet; Bauformat Kitchens; Tilemaze; Brushstrokes Graphics and B8 units to let (5,280 sq ft)
Other	Volvo Car Showroom; and Sub Station

(Source: GVA Grimley, 2009)

Superstores

- 5.27 According to PROMIS (August 2009) there is 117,100 sq m (1.26 million sq ft) of floorspace (in superstores and supermarkets) in the area, which is above average provision per household. There are 10 superstores trading in the area (Asda - 4, Morrison's – 2, Sainsbury's – 2, Tesco – 1 and Co-Op – 1). In addition there are a number of supermarkets, with both Somerfield and Iceland well represented, alongside other low priced retailers such as Aldi and Lidl.

Growth Prospects and Retail Demand

Development Opportunities

- 5.28 The main development opportunity in the Study Area incorporates the vacant site of the former Shannon's Mill complex which is part of the Norton and Profit/ St. Modwen's proposals

previously discussed in Section 2. There are, however, other opportunities and redevelopment plans in the pipeline.

- 5.29 These include Threadneedle's plans to reconfigure the current Tesco Metro unit within the Old Square Shopping Centre, once Tesco relocate to their new 11,152 sq m (120,000 sq ft) store on the former Walsall College site (2011 onwards).
- 5.30 As part of their future plans, Threadneedle are hopeful of trying to attract a major fashion retailer. If successful, this will be an added draw to footfall in the Digbeth area. In addition, they intend to demolish the bridge link that currently acts as an impediment to providing a clear sight line for pedestrians walking between Bridge Street and the new Asda store.
- 5.31 INVISTA, the owners of The Saddlers Centre, are also considering reconfiguring part of their scheme as Argos may be moving out to a new edge of town location. These proposals for relocation of key retailers from the town centre are a key concern and tend to underline the need to implement policies that seek to maintain and enhance the towns central retail offer if possible.

Demand

- 5.32 According to PROMIS in July 2009 there were eight reported requirements for Walsall which is considerably below the average of 21 for other centres, ranking the town 150th out of 200 centres.
- 5.33 This is low for a town of its size and status, but could be due in part to the current economic recession and as a result of the competition of larger local centres such as Birmingham and Merry Hill.
- 5.34 We are aware that Primark have a key requirement for the town centre, as do, amongst others, Peacocks and WH Smiths. Further, we understand that there is demand from A3 operators (Ask, Costa Coffee and Pizza Express) for space in the town.

Retailer Mix

- 5.35 As Tables 5.3 and 5.4 indicate, the majority of usage in the town centre (80%), as to be expected, is taken up by retail shops (A1 Use Class). The consultant has surveyed the whole of the Study Area and there follow a series of plans (Figures 5.2-5.8) which indicate the retailers represented in the centre.
- 5.36 Due to the scale of the study area, we have sub-divided our analysis into six discrete areas lying within a framework plan covering the whole centre.

5.37 The main components of each of the retail plans are briefly described below:

- **Figure 5.3: Plan 1 – Crown Wharf Retail Park** shows that this area solely comprises A1 shops, with the exception of one Use Class A3 use (restaurants and cafes);
- **Figure 5.4: Plan 2 – Walsall Town Centre A** illustrates the Park Street region of the study area. This area largely consists of Use Class A1 shops. The Park Street frontage largely consists of large High Street retailers including Marks and Spencers, Boots, New Look and British Home Stores. Although there are a number of vacant units, these are largely located away from the Park Street frontage;
- **Figure 5.5: Plan 3 – Walsall Town Centre B** illustrates the area to the south of the existing markets area and includes a large Asda supermarket and a large vacant site. There are a significant number of charity shops and hair and beauty units in this area, as well as a large number of vacant units;
- **Figure 5.6: Plan 4 – Walsall Town Centre C** highlights the markets area along with Bridge Street and Old Square Shopping Centre. This area consists of two large A1 units (Tesco and Debenhams) and a concentration of uses within Class A2 (Financial and Professional Services) along The Bridge and Bridge Street. There are also a large number of vacant units;
- **Figure 5.7: Plan 5 – Park Place Shopping Centre First Floor** shows the retail units above Wilkinson's, Poundland and Boots as highlighted by Plan 2 (Figure 5.4). With the exception of Wilkinson's, occupiers are generally local; and
- **Figure 5.8: Plan 6 – Saddlers Centre Lower Ground Floor** largely comprises A1 uses with the exception of two A4 uses and one vacant unit. Occupiers are largely High Street retailers including Argos, Boots and the Early Learning Centre, with some smaller retailers such as Diva Clothing and T H Baker Jewellery.

Figure 5.2: The Study Area Inset Plans (Source: GVA Grimley, 2009)

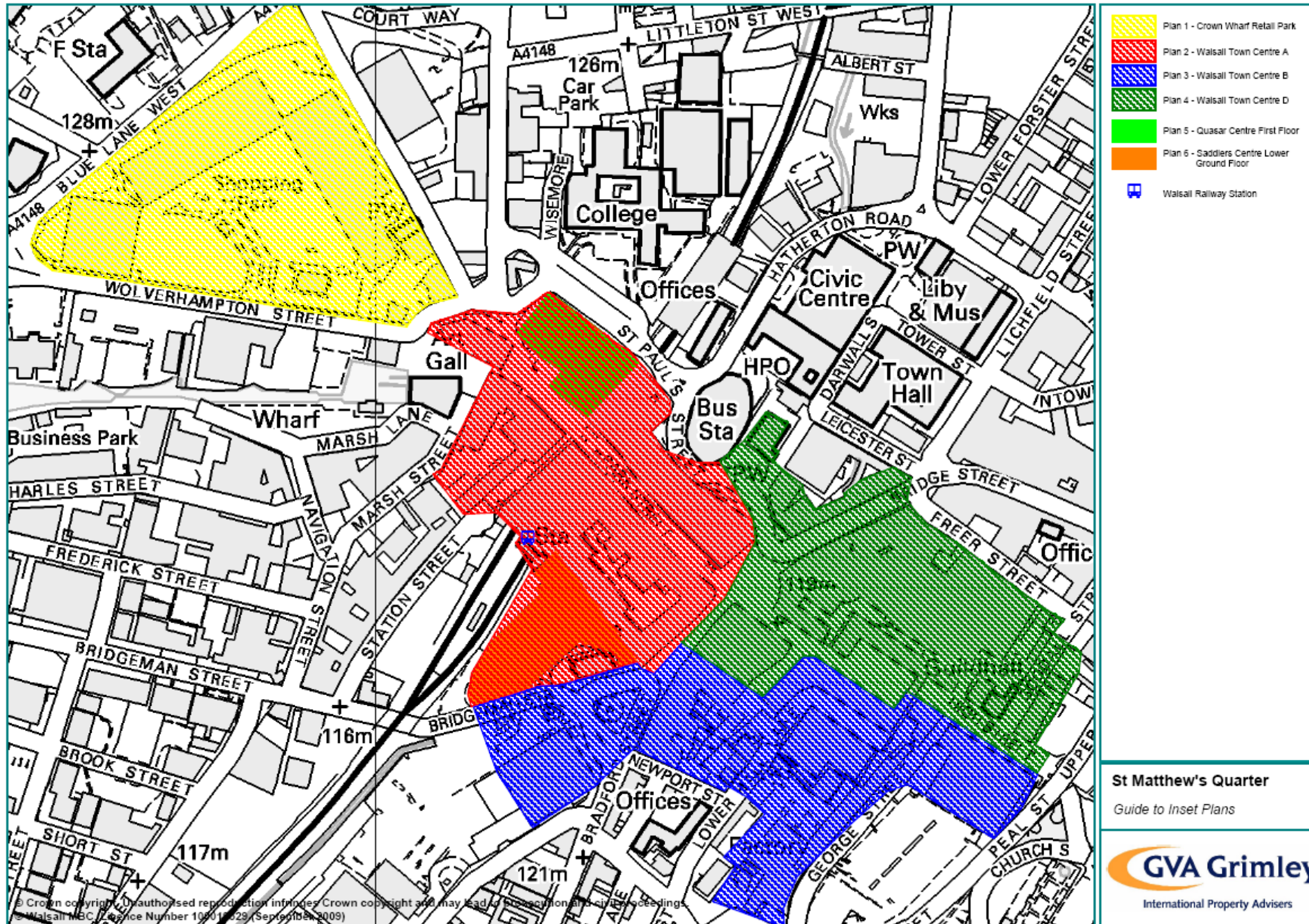
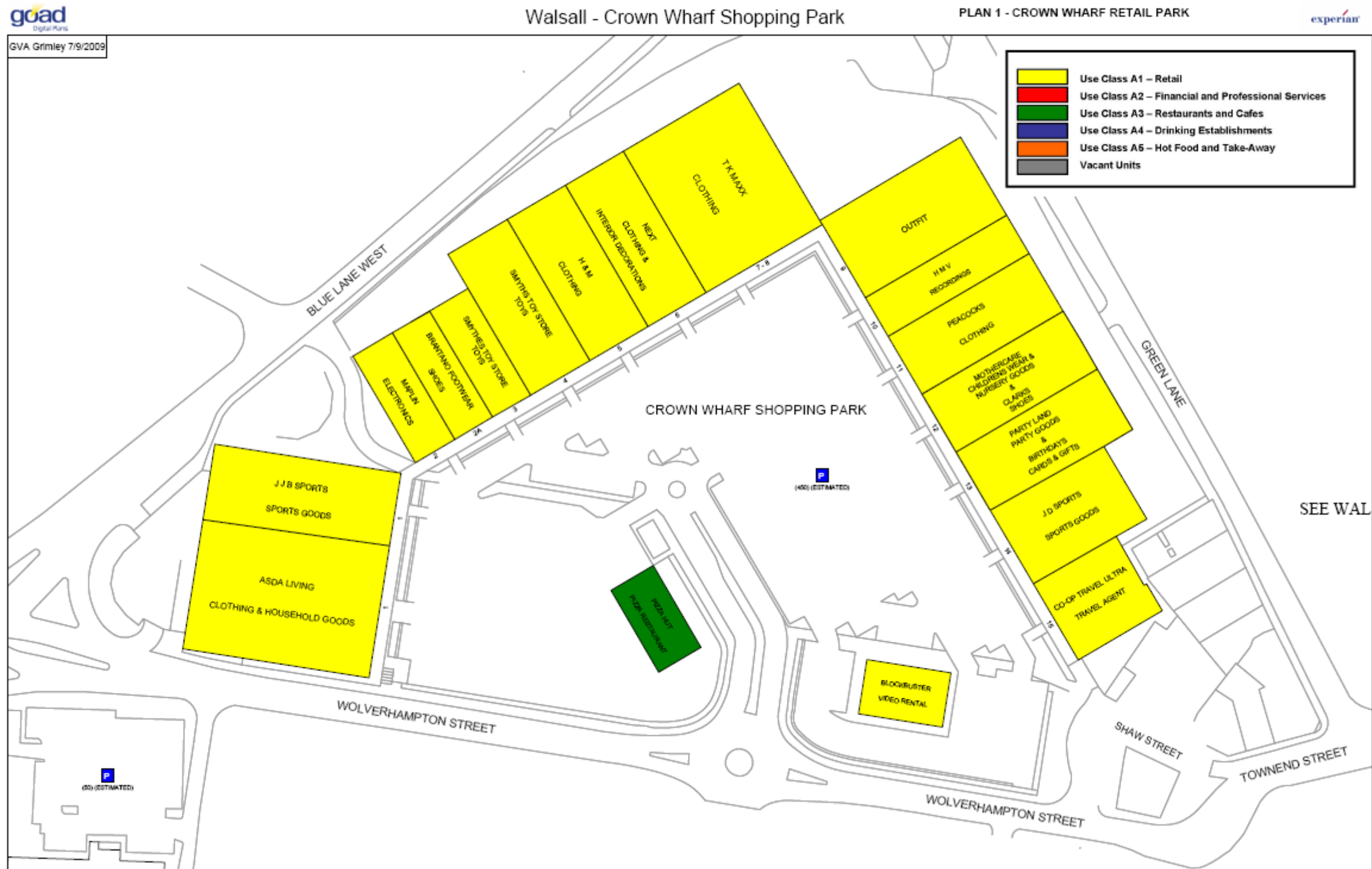
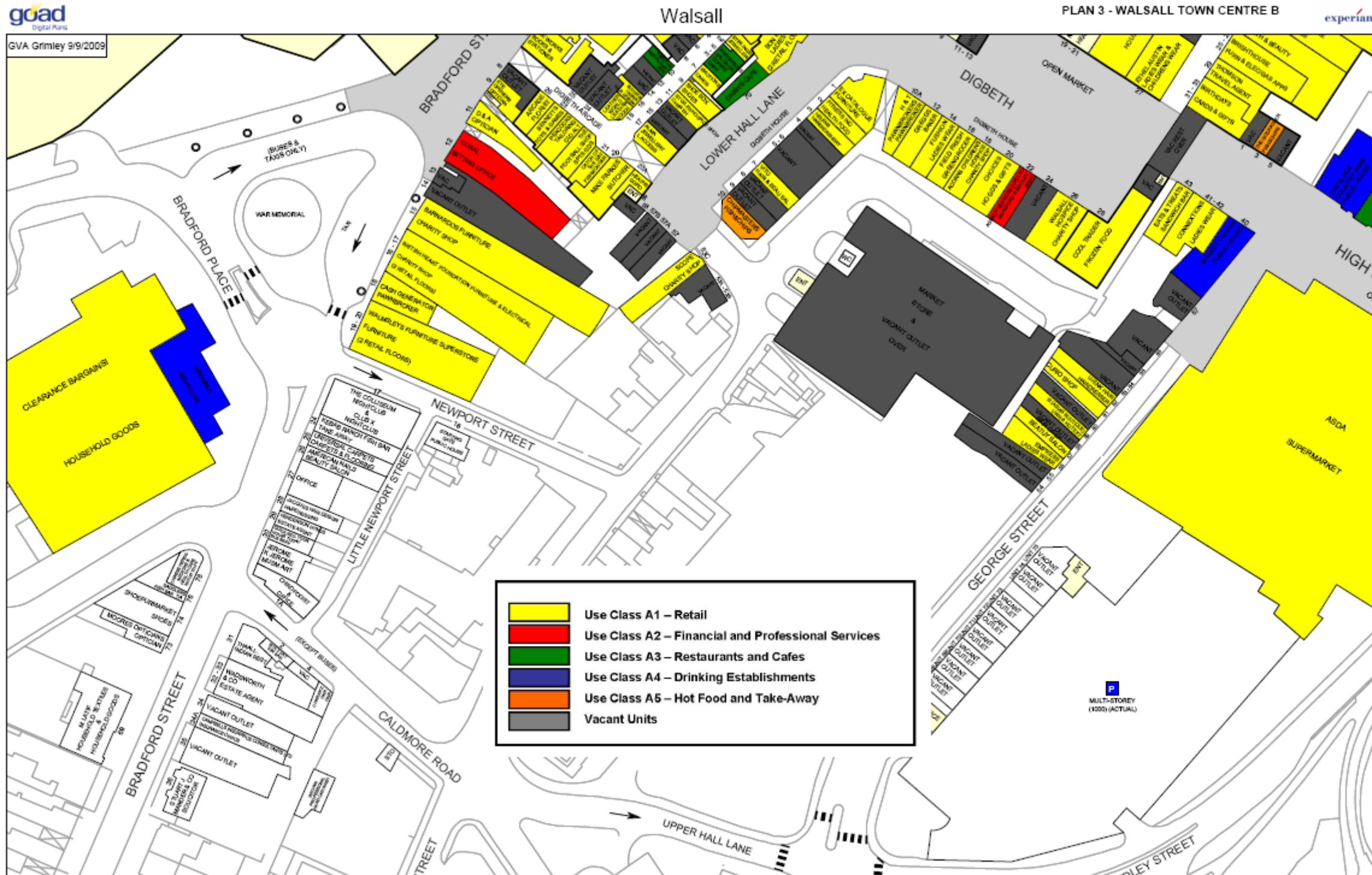


Figure 5.3: Plan 1 – Crown Wharf Retail Park



(Source: GVA Grimley via GOAD, 2009)

Figure 5.5: Plan 3 – Walsall Town Centre B



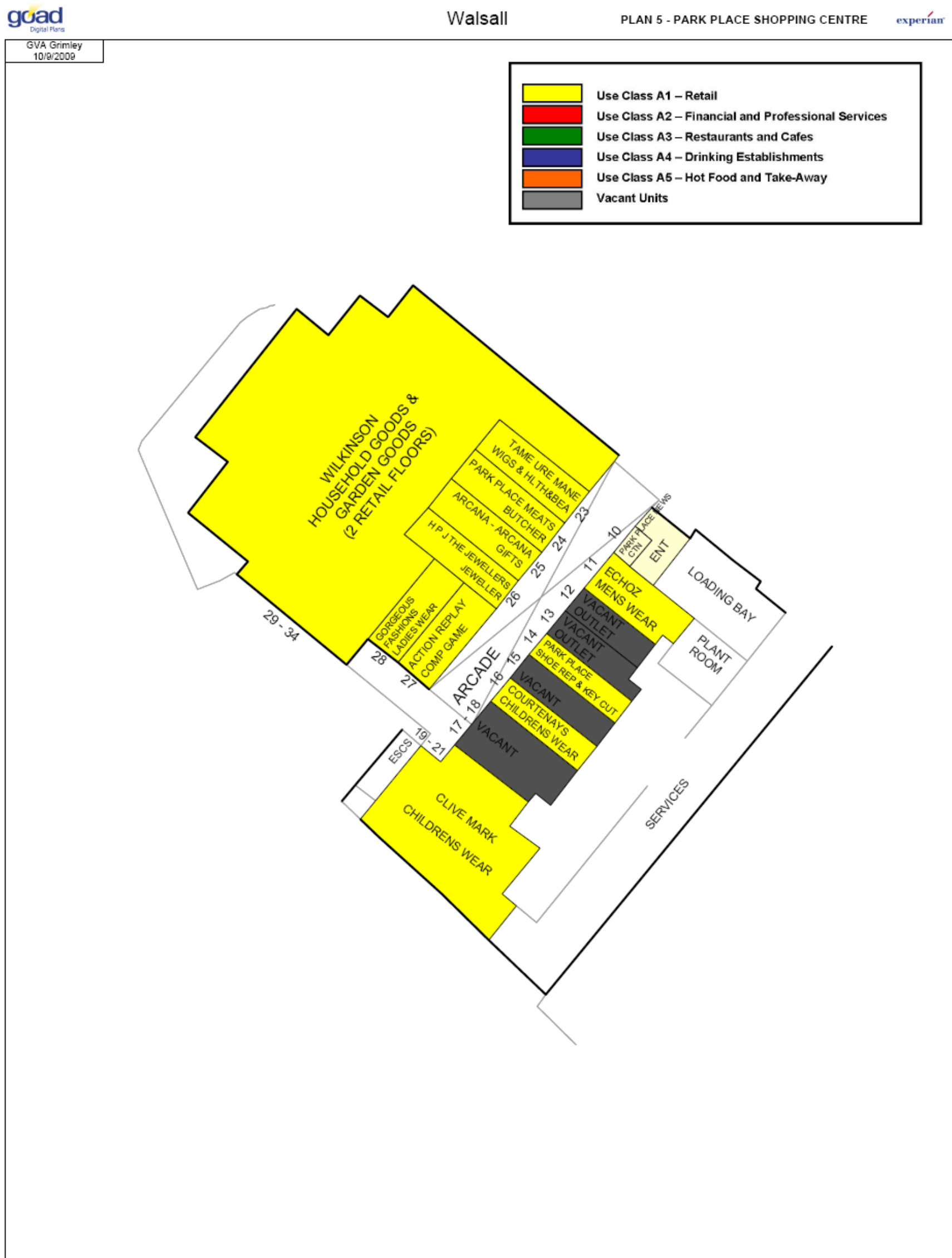
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International Property Advisers

(Source: GVA Grimley via GOAD, 2009)

Figure 5.7: Plan 5 – Park Place Shopping Centre (formerly Quasar Centre) First Floor



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(Source: GVA Grimley via GOAD, 2009)

Performance of the Town Centre

Zone A Retail Rents

- 5.38 According to PROMIS, prime rental growth in Walsall was above the average in the 1990's where it reached a peak of £135 per square foot (psf) Zone A in 2000. Rents fell back to £125 psf during 2002 and remained at similar levels until the end of 2008 when rents started to fall due to market trends. By mid 2009 prime rents in the town were £115 psf, which is slightly below the PROMIS major town average of £123 psf (August 2009).
- 5.39 The current 'Zone A' rental level ranges for key areas within the Study boundary are as follows:
- Digbeth £25 - £30;
 - Bridge Street: £60 - £75; and
 - Park Street: £100 - £115.
- 5.40 As a result of the current economic climate, retailers with leases which are currently on review are arguing for a "nil increase", citing the fact that shops are currently being let on "short-term" leases or licences at very advantageous lease terms, which is providing evidence of a "nil increase".
- 5.41 Similarly, those retailers who have leases with "break clauses" or are coming up for renewal are currently adopting the negotiating stance with their landlords that if they were to be acquiring their unit in today's climate they would be benefiting from advantageous "packages" including lower rents and rent free periods – and thereby asking their landlords to renew these leases on better (i.e. lesser) terms than they are on currently. All this means that the tone of values are not increasing and arguably, in real terms, reducing.
- 5.42 It is hoped that by mid 2010 the economic climate for retailing will have started to improve, but if rent reviews are on a five-yearly cycle, it will take up to five years for the current "downgrading of values in real terms" to work through the system such that rent reviews will be able to utilise evidence when negotiating the scale of any uplifts.

Vacancies

- 5.43 As indicated in Tables 5.3 and 5.4 and represented graphically in Figures 5.3 - 5.8, there are a number of vacant shops in Digbeth, The Arcade, Lower Hall Lane, Bridge Street, Bradford Street and Park Street. This equates to 13% (22,675 sq m) of the total retail floorspace within our study area boundary. This makes up a significant proportion of the town's vacancy rate

- (as indicated by PROMIS in their June 2009 survey) of 22.8%. This figure is significantly above the average of 7.7% and reflects the contraction of the centre as a result of the economic recession and the fall out from retailers that have gone into administration (i.e. Woolworths and Zavvi).
- 5.44 Vacancy rates have historically been high in the Old Square Shopping Centre, with the June 2009 survey indicating 18 vacant units (40% of total space). Retailers such as Birthdays, First Choice and Going Places have all vacated space in the centre. Our September 2009 survey identified that this had increased to 26 vacant units (see Fig 5.6). This reflects falling footfall and a general deterioration in the environmental quality of the area.
- 5.45 Further, there are a number of vacant units in and around Digbeth Arcade and there has been a marked rise in the number of vacant units on Bridge Street. The number of vacant shops in these key areas which become occupied as the economy improves will however be easier to monitor – albeit other factors dependant upon the retailers requirements in relation to the size, configuration and adjacencies will affect their ability to be let.
- 5.46 It is not appropriate, therefore, to automatically presume that a market stall erected outside a vacant shop will either be detrimental or advantageous to its future lettable. However, experience shows that if a tenant had the choice of two identical units in a prime location and one had its frontage obscured by a market stall for five days a week then he would choose the unit with clear visibility to its customers. This decision will also be influenced by the market operational and management controls in place which if unsatisfactory could reduce the attractiveness of the shop to potential customers and hence the investment potential of the unit.

Commercial yields

- 5.47 PROMIS indicated prime retail yields of 8% in Spring 2009 (slightly above the centres average), which showed an outward yield shift on the previous six month level in line with other comparable centres.

Land values

- 5.48 With the exception of the St Matthew's Quarter there is currently little undeveloped land within the prime retail core of the town centre. However land values for retail development will be a result of the type of development undertaken – for example major foodstore operators are currently paying around £2 million per acre for land with consent for a store of 80,000 sq ft gross with surface car parking; whereas for a smaller retail unit scheme the land value would reflect nearer £1 million per acre.

Town Centre Movement

Pedestrian Flow Surveys

- 5.49 Pedestrian flow count surveys were undertaken in Walsall Town Centre during June (13th-14th) 2003 and September (18th-19th) 2009 by Pedestrian Market Research Services (PMRS). The analysis was undertaken at 30 locations in Walsall Town Centre (see Fig. 5.9 for 2003 and Fig 5.10 for 2009 survey outputs).

Key Findings

- 5.50 We summarise below the key findings of both surveys in the locations that are particularly pertinent for the proposals being considered for the temporary relocation of Walsall Market. Tables 5.6 and 5.7 below identify footfall at key locations in relation to the current market location, and the proposed temporary location.

Table 5.6: Footfall in Walsall Town Centre, 2003 (Source: GVA Grimley, via PMRS data)

Map Ref.	Location	Count (in thousands) ¹		
		Friday	Saturday	Week
<i>(See Figure 5.9)</i>				
1	Curtain Gallery, 62 George Street	2,220	2,160	10,310
2	Sainsbury's, 35 High Street	4,410	4,710	21,460
3	Discount Clothes, 23 Digbeth Square	2,130	5,250	17,370
4	Clinton Cards, 31-38 Old Square Shopping Centre	8,400	14,370	53,580
12	Halifax, 6 The Bridge	9,750	11,880	50,900
13	Harvey and Thompson Pawnbroker, 10a Digbeth Square	7,920	11,340	45,320
14	Chipmaster 10 Lower Hall Lane	3,240	4,110	17,290
15	Leather World, 18 Digbeth Arcade	3,780	4,620	19,770
16	Barclays Bank, The Bridge	8,670	11,460	47,370
17	Cash Convertor Pawnbroker, 18 Bradford Street	8,160	5,460	32,050
18	Rosebys, 85 Bradford Street	11,130	14,460	60,210
19	Steve's, The Bridge	6,210	6,180	29,150
20	MVC Records, 4 The Bridge	12,570	15,060	65,010
21	The Clothing Shop, 24-26 Park Street	13,710	21,390	82,590
22	Price Pounder, 21-23 Park Street	12,450	23,790	85,270
Total:		114,750	156,240	637,650

¹ The totals given for Friday and Saturday represent samples which have been multiplied by 30, to allow for the fact that pedestrian movements were counted for a total of 12 minutes out of a possible 6 hours. The numbers given for the whole week were calculated by multiplying the sums for Friday and Saturday by 2.353. This figure is an average based upon previous counts conducted throughout the week (also relevant to Table 5.7).

Table 5.7: Footfall in Walsall Town Centre, 2009

Map Ref.	Location	Count (in thousands)		
		Friday	Saturday	Week
<i>(See Figure 5.10)</i>				
1	Vacant, 35 High Street	3,780	4,410	19,270
2	Vacant, 62 George Street	990	1,470	5,790
3	Eats and Treats Café, 43 High Street	9,450	12,420	51,460
4	Harvey and Thompson Pawnbroker, 10A Digbeth	20,340	24,720	106,030
5	Vacant, 5-6 Lower Hall Lane	6,210	8,460	34,520
6	Barclays Bank, Digbeth	21,060	25,170	108,780
7	Leather World, 18 Digbeth Arcade	1,710	2,130	9,040
8	Abbey Bank, Bradford Street	17,820	22,440	94,730
9	Cash Generator Pawnbroker, 18 Bradford Street	10,560	8,070	43,840
12	Marks and Spencer, 53 Park Street	26,070	32,640	138,140
20	Vacant, 21-23 Park Street	24,240	30,780	129,460
23	Steve's Household Goods, The Bridge	7,770	6,120	32,680
31	Vacant, 31-35 Old Square Shopping Centre	8,520	10,350	44,400
Total:		158,520	189,180	818,140

(Source: GVA Grimley, via PMRS data 2009)

- 5.51 Figure 5.11 provides a thermal representation of the weekly footfall in Walsall town centre. Overall, the results show that the footfall in Walsall town centre in 2009 is greater than the footfall in 2003. Saturday was the busiest day in both 2003 and 2009, which gives an average of 9,520 (2003) and 11,230 (2009) people passing each count point in the centre.
- 5.52 The footfall at both bus stations was greater on Friday than Saturday in both surveys, which may be due in part to those who use public transport during the working week, and could indicate that visitors to the town have increased access to a car at weekends rather than weekdays. It is worth noting that the number of pedestrians in this location has increased between the two surveys, which indicates an increased reliance on public transport in 2009 than in 2003, perhaps as an impact of the economic recession currently being experienced.
- 5.53 The results show that there is a clear locational hierarchy within Walsall Town Centre, with locations in Park Street (the prime pitch) achieving the highest footfall, and Wolverhampton Street and George Street/ Bridge Street achieving the lowest footfall in 2003 and 2009 respectively. George Street had higher footfall in 2003 than 2009, and this may be due to the reduction in footfall in this part of the town centre as a result of the Shannon's Mill fire in 2007. It is worth noting that in 2003 the upper end of Park Street had less pedestrian footfall than the lower end of Park Street, which is the proposed location for the market in Options 2 and 3. However, in 2009, the upper end of Park Street (outside Marks and Spencers), was the busiest location. In 2003, the Saddlers Centre had a relatively high footfall; however, the figures indicate that footfall has decreased from 64,240 per week in 2003 to 57,250 in 2009, a

- change of 6,990, again this could be as a result of the impact that the current market conditions are having upon customers.
- 5.54 In 2003, the Crown Wharf Retail Park, to the west of the Primary Shopping Area, had a lower footfall than those recorded at certain locations surrounding the current market. This could be due to it being located outside of the Primary Shopping Area to the west of the town centre. However, in 2009 footfall in this location had increased, with 12,330 pedestrians counted on Saturday, an increase of 6,060.
- 5.55 Both surveys revealed that pedestrian footfall in the current market location (Option 1) was, in general, greater in the central spine, than in the side streets. Although, it is worth noting that in the 2009 survey, Bradford Street (included in Options 2 and 3) had a higher pedestrian footfall than in 2003. Whilst the footfall in the current market location was less than Park Street, it is still significant as on Saturday 11,880 (Map Ref: 12) and 25,170 (Map Ref: 6) people were counted in 2003 and 2009 respectively. Whilst there had been a decrease in the number of pedestrians in the Old Square Shopping Centre, which adjoins the current market, it is still significant, and may reflect the convenience of parking in the Shopping Centre for access to the market.
- 5.56 The 2003 survey indicated that footfall around Sainsbury's was low despite its location close to the market and Shannon's Mill. However, the 2009 survey illustrates that footfall around the new Asda (previously Sainsbury's) has decreased since the 2003 survey. This could be (in part) a consequence of the Shannon's Mill fire in that footfall is not higher in this location; but it is also more likely that the poor legibility / permeability of this part of town has continued to decline in recent years. Anecdotal evidence suggests that the majority of Asda shoppers are car borne and therefore do not walk through Digbeth / Old Market Square to shop at Asda.

Summary

- 5.57 Both surveys illustrate that footfall decreased further away from the central shopping area. Park Street, where there are a number of mainstream retailers, had the highest footfall whilst side streets, where there are a number of independent retailers, had much lower footfall. The footfall in the central market area was still significant and attracted higher numbers of pedestrians than the new-build development at Crown Wharf Retail Park in both surveys.

Figure 5.9 – Locations of 2003 Footfall Analysis (PMRS, 2003)

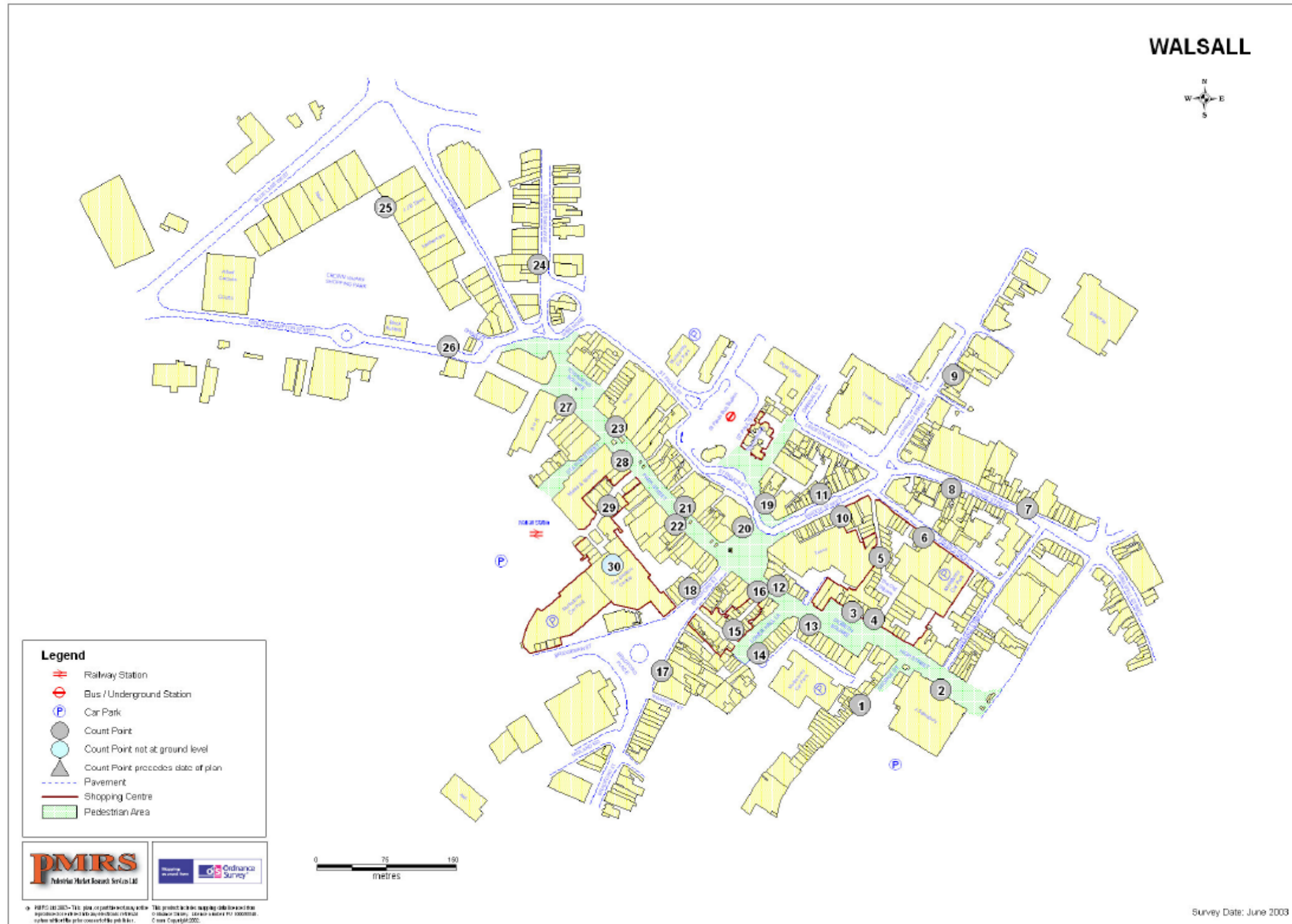


Figure 5.10 – Locations of 2009 Footfall Analysis (PMRS, 2009)

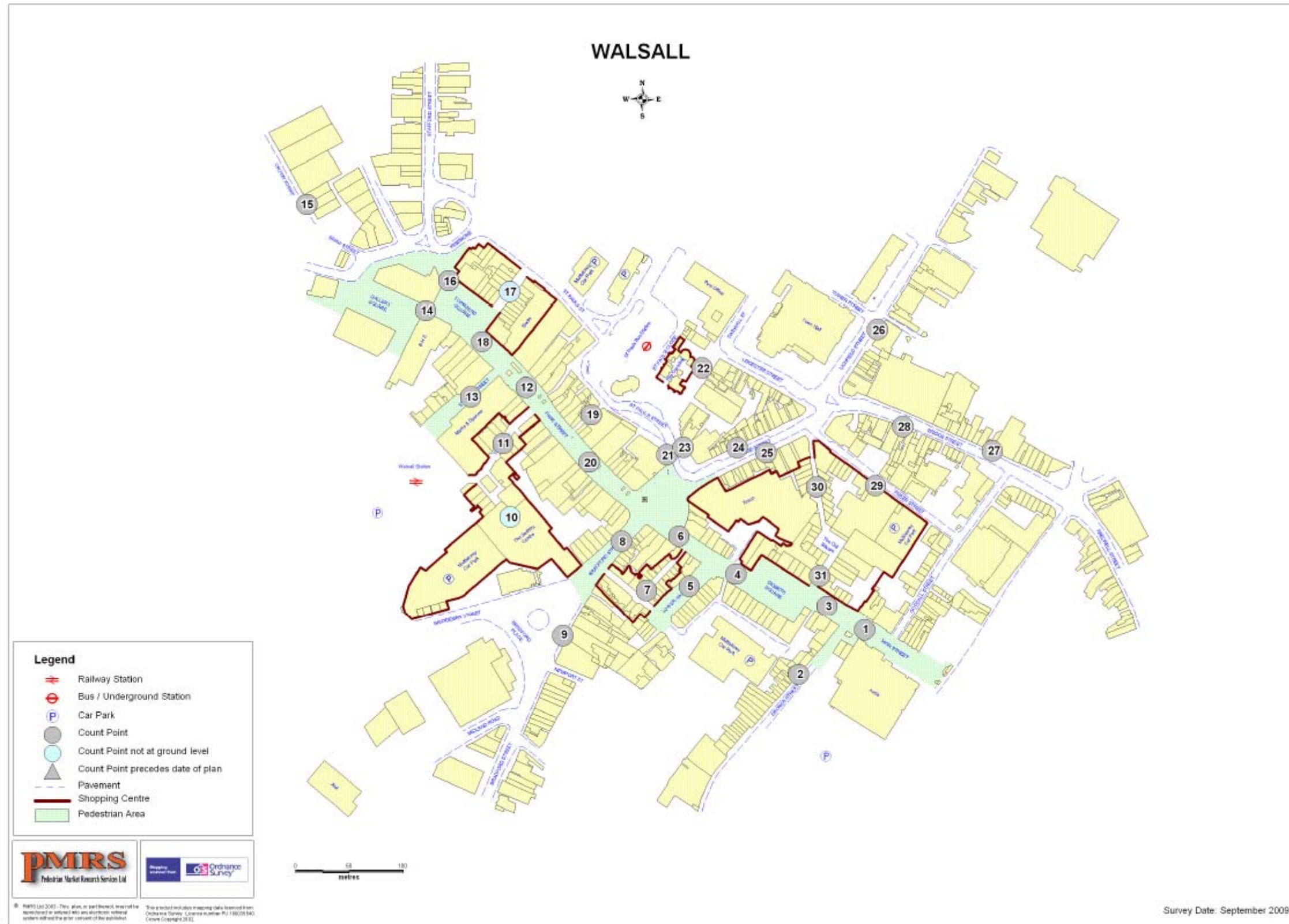
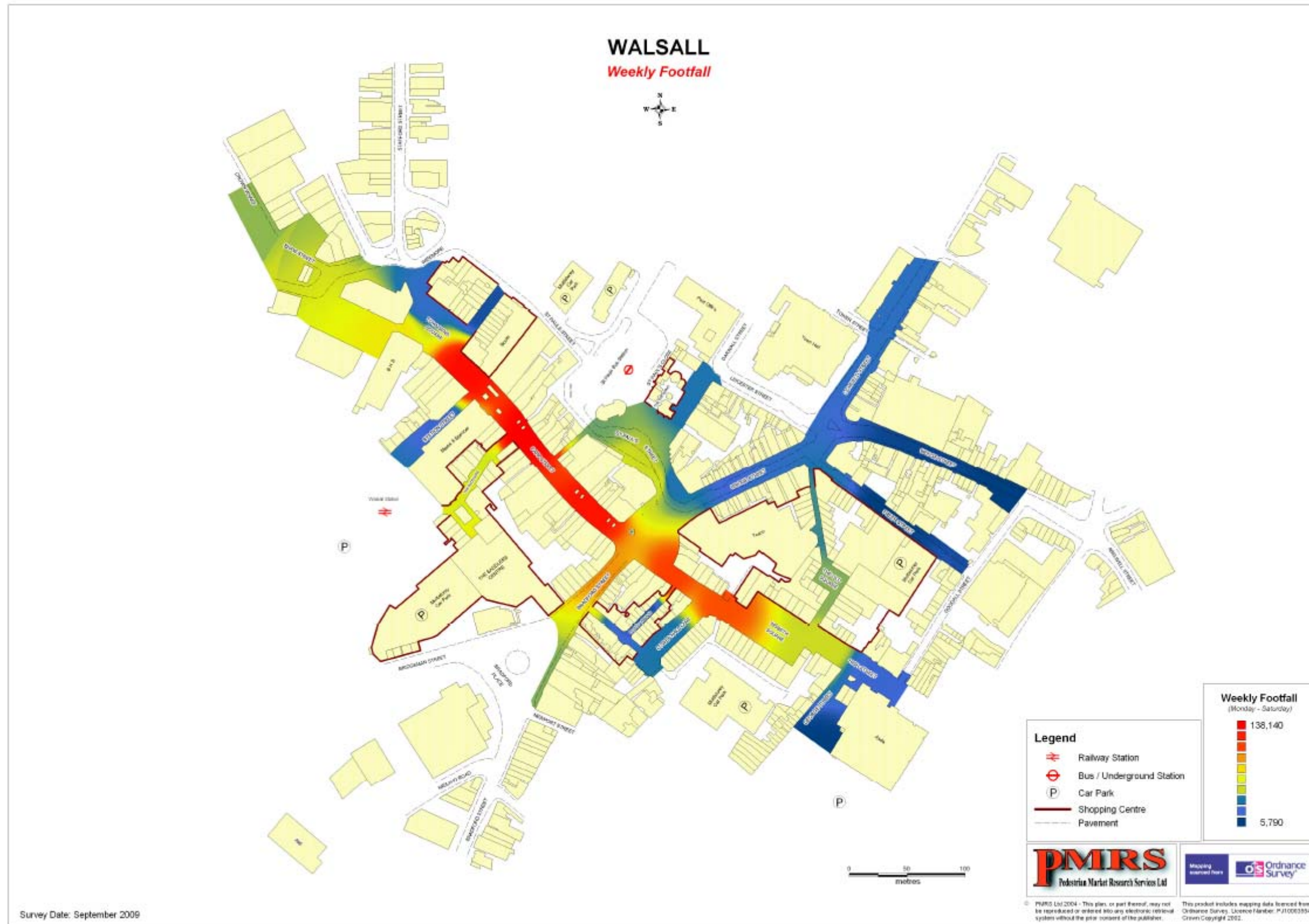


Figure 5.11 – Thermal Plan of 2009 Footfall Analysis (PMRS, 2009)

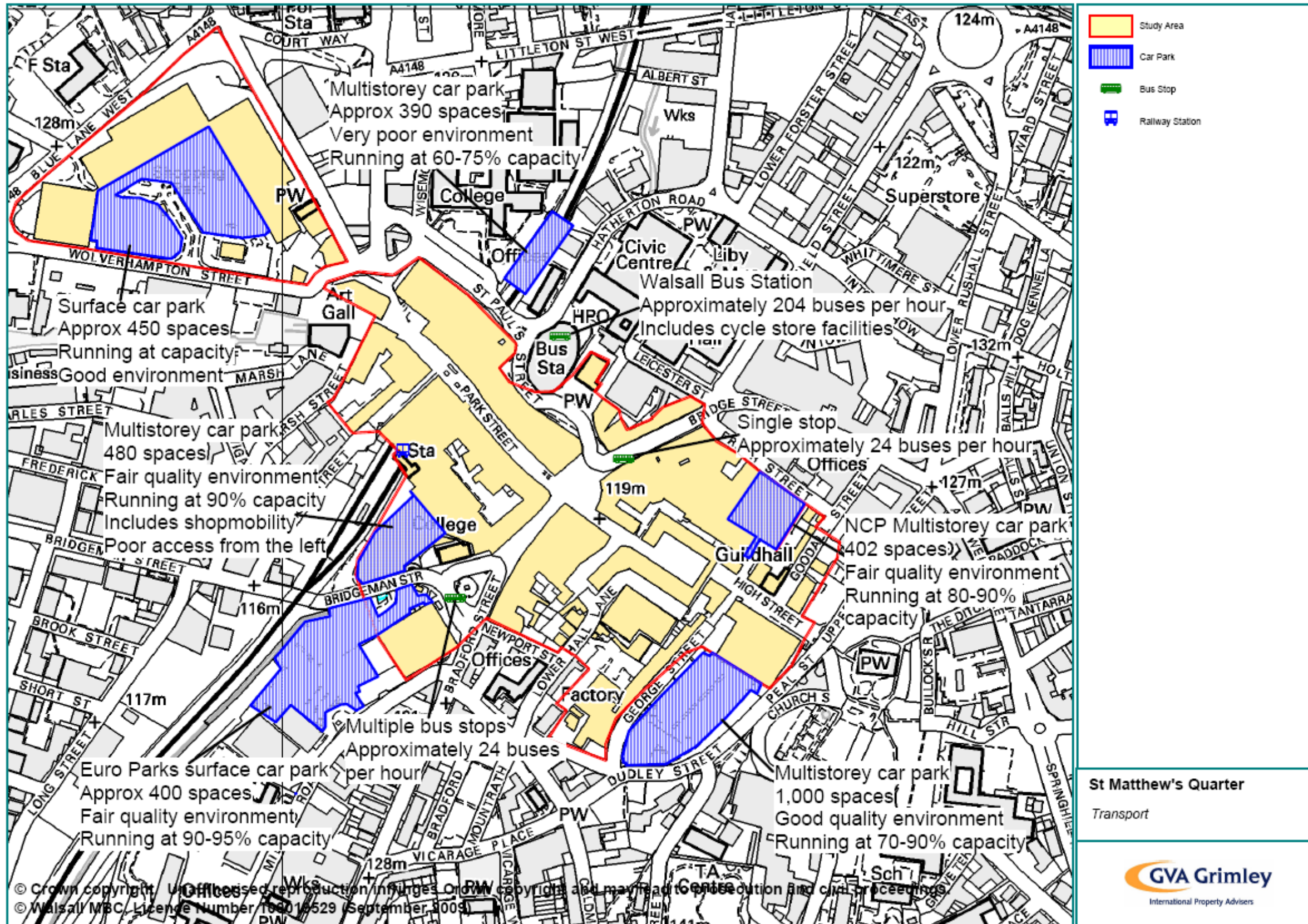


Accessibility

- 5.58 Figure 5.12 summarises the accessibility of the town centre by various modes of transport by reference to the location of various public transport nodes and car parks.
- 5.59 There are three car parks located within the study area providing circa 1,332 parking spaces. The car park at Jerome Retail Park is partially located inside the study area and contains circa 400 spaces. In addition to this, there are two car parks on the periphery of the study boundary providing 1,390 additional parking spaces. Most of the car parks are running close to capacity, the exception being the multi-storey car park off Hatherton Road (outside of the study area) which does not appear to be as busy.
- 5.60 Only two of the car parks (Crown Wharf and Asda) are considered to provide a good quality environment (modern, clean, well lit and with a safe feel). The car park off Hatherton Road is considered to provide a very poor quality environment (dark, dirty, low ceilings, enclosed and has an uneasy feel). The remaining car parks are considered to provide a fair quality environment (fairly clean and light but could benefit from improvements).
- 5.61 There are three public transport nodes within the study area. There are a series of bus stops located at the Cenotaph and a single stop outside Tesco on Bridge Street. In addition to this, Walsall Bus Station is located on the periphery of the study area on St Paul's Street, and Walsall Train Station is located to the rear of the Saddlers Centre with an access point from the Centre itself.
- 5.62 The number of buses stopping at each of the three bus stops / stations (as identified on the map) were recorded over a five minute period. This has been averaged out to find the approximate number of buses stopping at each area during one hour. The results were as follows:
- Cenotaph – circa 24 buses per hour;
 - Bridge Street – circa 24 buses per hour; and
 - Walsall Bus Station – circa 204 buses per hour.
- 5.63 Bus services run from Walsall to a variety of destinations including a large number of local centres in Walsall Borough and Birmingham. Key routes Monday - Saturday include (times are approximate; Source: www.carlberry.co.uk):
- Every 7 - 9 minutes – Birmingham City Centre; Wolverhampton;
 - Every 15 minutes – Dudley; Stourbridge;

- Every 20 minutes – Cannock; Brownhills; and
 - Every 30 minutes – Rugeley; Lichfield; Bloxwich.
- 5.64 Walsall Railway Station offers services every half an hour to Birmingham New Street, Wolverhampton and Rugeley Trent Valley.
- 5.65 We understand from Centro that both bus stations are at capacity and will need to be expanded to cope with any increase in demand. Further, we have been made aware that plans are being considered to introduce a fourth platform at the rail station that will increase its capacity and increase the station's attractiveness for intercity train operators to consider stopping their services at the town's station.
- 5.66 This information confirms that the Study Area is well served by public transport services, in particular via Walsall Bus Station as the major transport interchange alongside the rail station.
- 5.67 Facilities for cyclists are provided in the form of lockers at Walsall Bus Station. Most of the car parks provide designated disabled spaces and the Saddlers Centre car park provides Shopmobility facilities.

Figure 5.12 – Accessibility of the Study Area (Source: GVA Grimley, 2009)



Town Centre Perceptions

Views of the Traders/ Shoppers

- 5.68 A number of objections were received as part of the consultation process to inform the earlier planning application to relocate the markets (the permission for which was revoked by Walsall MBC in August 2008). The key objections are summarised below in Table 5.8.

Table 5.8: Objections to 2008 Planning Application to Relocate the Market:

Respondent	Main Reasons for Objection
Shoe Zone	Reduced visibility of their store; and Access to the premises.
Asset Management Matters (AMM) for Walsall Trust (owners of the Saddlers Centre)	Fall in retail rental values and increase in vacancies on Park Street; The height of the stalls will impact on the visibility of advertising shop frontages and on footfall; Loss of public realm; Vacant stalls will adversely affect the shops; Selling hot food could adversely impact the attractiveness of the retail offer in the street; Increased deliveries at peak time would impact on pedestrian safety; and Units in the area will be harder to let.
Reps on behalf of AMM	Viability of existing units should be considered; Impacts on the ability to regenerate other areas of the Town Centre; Puts established retail frontages at risk; Height of stalls impacting visibility – impact on footfall; Loss of planting areas and street furniture; Impact of vacant stalls on store trading; Unwelcome odours from hot food; and Increase in delivery vehicles – issue for pedestrian safety and emergency service vehicle access.
Indigo on behalf of Threadneedle Property Investors (managers of Old Square Shopping Centre)	Pedestrian movement away from the Old Square Shopping Centre – market is main driver for footfall; and Impact on pedestrian flow.
DTZ on behalf of Threadneedle Property Investors (managers of Old Square Shopping Centre)	There is no guarantee that the wider development proposals for the redevelopment of the market will come forward; The Old Square frontage will be obscured; The market will act as a barrier, reducing footfall along Digbeth and High Street; Shop closures at Old Square; and Pressure for Debenhams to seek alternative locations.
West Midlands Police	Reduced efficiency of CCTV – reduced lines of sight and increased footfall causing blind spots; Increased number of pedestrians – increase thefts; Danger to pedestrians from delivery vehicles; and There should be a location for the mobile police station during the Christmas period.
Other	Increased congestion; and Disabled access.

(Source: Walsall MBC/ GVA Grimley, 2009)

- 5.69 The main concerns expressed by local residents and customers in relation to the earlier planning application focus upon the impact of the market stalls on existing units. These include reduced visibility for units at the proposed relocation site and reduced footfall for those at the current site, access and a reduction in rental values and an increase in vacancies.

5.70 It is also noted that the following organisations/ individuals had no objection to the proposals:

- Transportation (Walsall MBC);
- Pollution Control (Contaminated Land) (Walsall MBC);
- Environmental Health (Walsall MBC);
- Public Rights of Way Team (Walsall MBC);
- Urban Design and Built Conservation Team (Urban Design) (Walsall MBC);
- Urban Design and Built Conservation Team (Regeneration) (Walsall MBC);
- Access and Disability (Walsall MBC);
- Fire Service;
- Natural Environment (trees);
- Centro; and
- There were no public participation (i.e. local resident's) responses.

Safety and occurrence of crime

5.71 The objections to the planning application (08/1084/FL) for the proposed temporary relocation of Walsall Market raised two key concerns, with regard to the issues of crime and safety, namely:

- Loss of natural views across the street; and
- An increase in vandalism and theft.

5.72 West Midlands Police also raised concerns that the relocation of the market would reduce the lines of sight due to the increase in foot traffic and the positions of the stalls, thus reducing the efficiency of the town centre CCTV system. This could result in an increase in vandalism, however the representations acknowledge that market operators are working with the Police and CCTV monitoring team to ensure that there is adequate surveillance. Further, the Police argued that the increase in pedestrian traffic in busy streets may lead to an increase in personal thefts (pick pocketing etc.) and also expressed concerns over pedestrian safety due to the increased number of delivery vehicles.

5.73 All these factors will be taken into consideration by Walsall Council when the latest relocation options are evaluated.

Environmental Quality

- 5.74 The quality of the town centre environment has been appraised as shown in Figure 5.12. The criteria by which the area was assessed to determine whether it is of good, fair or poor quality, were as follows:
- **Good Quality Environment** – clean, well lit, well maintained, good quality / aesthetic buildings, attracts good occupiers, low vacancy levels, good public realm, provides a good pedestrian experience;
 - **Poor Quality Environment** – dirty, dark, poorly maintained, poor quality buildings, attracts low end occupiers, high vacancy levels, poor public realm, provides a poor pedestrian experience; and
 - **Fair Quality Environment** – an environment with components of both of the above, but with potential areas for improvement.
- 5.75 Only two parts of the study area are considered to provide a good quality retail environment. These are the Crown Wharf Shopping Centre and Park Street. Much of the study area is considered to be of poor quality due to high vacancy rates, and poor building quality, public realm and pedestrian experience. These areas include Digbeth (where the markets are currently located), Lower Hall Lane and Bradford Street.
- 5.76 Equally, there are a number of areas which are considered to be of fair quality; these include the far end of the High Street, Goodall Street and The Bridge. These areas display both good and poor environmental factors. An example is the end of the High Street, which contains higher quality buildings but a poor pedestrian experience, due in part to the visual impact of Digbeth and the current market area.

Summary

- 5.77 The key findings from the above PPS6/draft PPS4 analysis are summarised in Table 5.9 below

Table 5.9: Summary of Key Findings from the Town Centre Health Check Assessment

Sub-heading Indicator	Summary
Retail Hierarchy and Catchment (A1-A2)	<p>The primary catchment area total population is above the major town average.</p> <p>The catchment population is one of the least affluent compared to other centres and is below the major town average.</p> <p>The shopping population of those who use the town as their major destination is above average.</p> <p>Town centre floorspace is above the major town average.</p>

Sub-heading Indicator	Summary
	<p>The volume and quality of the retail provision is below average compared to the size and affluence of the shopping population.</p> <p>The town's managed floorspace provision i.e. the Saddlers Centre, Old Square and Park Place is below the major town average.</p> <p>The borough has a high proportion of out of town retail, largely located along the M6 corridor between Junction 9 and 10.</p>
<p>Growth Prospects and Retail Demand (A3-A4)</p>	<p>There are limited development opportunities in the study area apart from the currently stalled St. Modwen's/ Norton and Proffitt scheme and the reconfiguration plans for Threadneedle for the Old Square Shopping Centre and Invista for the Saddlers Centre.</p> <p>Overall, there is a limited demand for space in the town from retailers, which is well below the major town average.</p>
<p>Town Centre Performance (A5-A8)</p>	<p>Zone A prime pitch rentals are slightly below the major town average.</p> <p>Vacancies are significantly higher than other comparable centres.</p>
<p>Town Centre Movement (A9-A10)</p>	<p>The highest footfall is found in the prime pitch area of Park Street/ The Bridge</p> <p>The town is highly accessible by public transport (bus and train) and car borne passengers.</p>
<p>Town Centre Perceptions (A11-A13)</p>	<p>Responses to the proposed relocated market (Option 2) as submitted in 2008 focussed upon the impact of the market stalls on existing units and included:</p> <ul style="list-style-type: none"> • Reduced visibility • Reduced footfall; • Reduced rental values; and • Increased vacancies.

(Source: GVA Grimley, 2009)

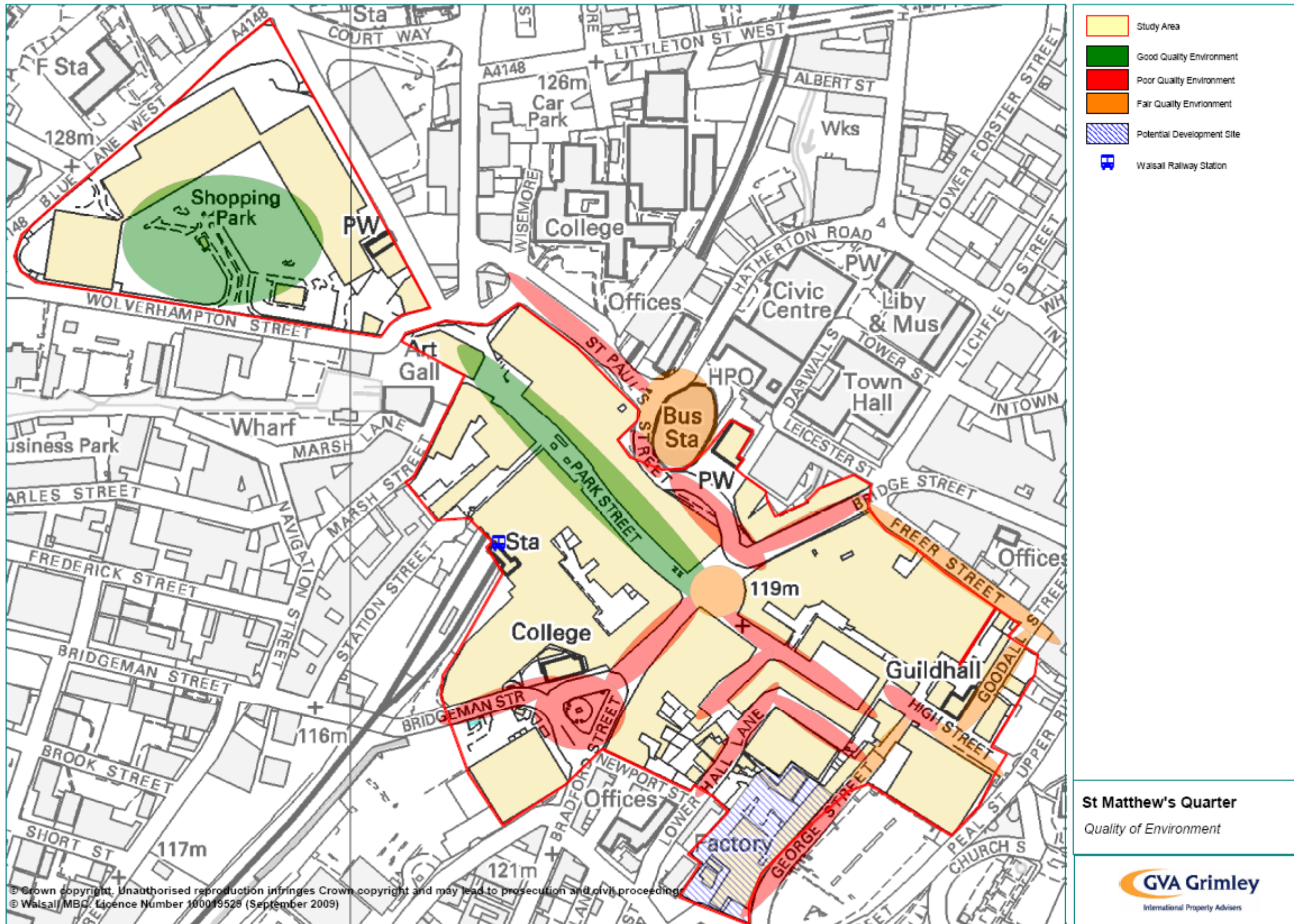
Conclusions

- 5.78 The consultant's PPS6/ draft PPS4 assessment of the town centre overall reveals a picture of declining vitality and viability. This is a consequence of a number of factors which include:
- Competition to Walsall town centre from other regional strategic centres such as Birmingham, Merry Hill etc and out of town retail parks, in particular, those at J9-10 of the M6 which provide customers with increased choice and which draws them away from the town centre.
 - The economic recession is impacting on high streets throughout the country as a consequence of lower consumer demand coupled with increasing vacancies as a number of major high street names such as Zavvi and Woolworths have gone into administration. The effects of the economic recession have had an impact on the Primary Shopping Area, including Park Street and adds to the fragility of Walsall town centre in light of the competition it is facing.
- 5.79 In view of the overall weakness of Walsall town centre, the consultant's conclusion from the above analysis is that the town centre's prime retail pitch (Park Street) needs to be supported

and protected. In qualitative terms, the Park Street area contributes substantially to the attractiveness and turnover of the town centre and it is imperative therefore that its role is not further weakened or threatened. Our concern is that a relocated market may do this, or at least will introduce the potential for this to happen. This aspect is discussed further in Sections 8 and 9.

5.80 The next section summarises the findings from the stakeholder consultation exercise undertaken as part of this commission.

Figure 5.12: St. Matthew's Quarter – Environmental Quality (Source: GVA Grimley, 2009)



6. CONSULTATION FINDINGS

6.1 This section summarises the key findings from the engagement exercise that we have undertaken with the agreed key stakeholders. Their detailed responses are provided in Appendix 2.

Approach

6.2 The consultant has engaged with the following key stakeholders (as agreed with the client group), as follows:

- British Land, on behalf of Crown Wharf;
- Urban Splash;
- London and Cambridge Properties (LCP), on behalf of the Quasar Centre;
- CBRE on behalf of BBC Pension Trust Ltd and National Australia Group;
- Invista Fund, on behalf of the Saddlers Centre;
- DTZ, on behalf of Threadneedle Properties;
- Asda;
- St. Modwens; and
- Market Traders Association.

6.3 We have approached and spoken with each of the above key stakeholders, using a standard set of questions formulated around key questions raised in the consultancy brief.

Key Findings

6.4 The perceptions of the key stakeholders in the local business community have been considered as part of our analysis and have informed this work.

6.5 We made telephone contact and thereafter wrote (by email) to representatives of each of the key stakeholders who provided the following responses outlined in Table 6.1 below.

Table 6.1: Summary of Consultation key Findings (Source "GVA Grimley, 2009)

Stakeholder	Response
British Land	Declined to comment as their landholding was not affected by the proposals.
Urban Splash	Did not think that the proposals were close enough to their interests in Walsall to warrant comment.
LCP	<p>LCP made the following (without prejudice) comments, which we quote from:</p> <p><i>"I had understood when this proposal was first made that it was to be a temporary arrangement during the redevelopment of the St. Matthew's Quarter, following which the market would be returned to that area. This seems to have become an option, with the possibility of it remaining as now proposed if it suits the developers or local authority purposes later on. The proposal to facilitate redevelopment temporarily is acceptable but permanent partial relocation of the market into Park Street would not be beneficial to that area.</i></p> <p><i>I would not in any circumstances support the location of proposed food concession van in Park Street.</i></p> <p><i>Whilst Park Place is unlikely to be affected detrimentally by these proposals I do feel that that planning the future of Walsall Town Centre should be carefully considered by reference to scale, existing townscape and economic projections, i.e. replacement not displacement development and although this appears to be only a small step I fear that it may be in the wrong direction."</i></p>
BBC Pension Trust Ltd/National Australia Group	CBRE Investors (as advisors) expressed concern as to conserving sight lines to the frontages of the shops occupied by their tenants in Park Street and Bradford Street
Invista Fund	<p>Verbal response expressed concerns as to the effect that moving the market stalls into Park Street and Bradford Street may have on the footfall to the two entrances to the Saddler Centre.</p> <p>Formal response – their main concerns are as follows:</p> <ul style="list-style-type: none"> • Temporary relocation of the market – concern that if the temporary market remains for more than three years this could significantly 'downgrade' Park Street's current trading environment. What are the councils proposals should the expected regeneration fail to materialise? • Discipline over the market traders – this is key as is the speed by which the 'new management code' can be enforced and the monitoring of its implementation. Suggest that there is a process to enable feedback to all concerned otherwise the town may be left with a lot of disgruntled retailers (who may even pull out if they are dissatisfied). A 'balanced view needs to be taken over any conflict in trade issue as the last thing anyone needs in this climate is a market stall outside their front door, undermining retail prices (same goods). • Market stands – with regard to the rejuvenated stands remaining in situ what happens if they are not being used as there will be nothing worse than an empty stand.
Threadneedle Properties	DTR (advisors) replied that they were satisfied with the level of consultation being conducted by the Council and that if the conditions that they had advised the Council of directly were satisfied they would give their support to the relocation proposals.
Asda	Expressed concern regarding the relocation of the market stalls being further away from the High Street/George Street as the level of footfall in and around the Digbeth area would be dispersed into Park Street and The Bridge. By relocating stalls away from Digbeth and High Street this may lead to retail units remaining empty and not assist with the regeneration of the area
St Modwens	<p>We quote from their detailed response:</p> <p><i>"We believe that a strong market in Walsall will help to differentiate the town from competing centres and help arrest shopper leakage to other towns. The current</i></p>

	<p><i>market suffers from old stalls and equipment and an unfocused tenant mix. Additionally when the market is not trading the unused stalls create an unfriendly shopping environment. We believe that a strong market with creative, firm management can become a destination and footfall generator in the town. If the market continues as it is we fear that will struggle to maintain occupancy and therefore detract from the retail offer in the town. We believe that the location and the health of the market are linked. A market that is trading poorly will be drawn to the highest footfall location in the town to survive whereas a market with a confident approach and clearly defined offer that matches consumer requirements could act as a vibrant draw to new and existing customers to the town and broaden the retail offer in Walsall.</i></p> <p><i>We have concern that by moving the market to The Bridge it will isolate the Old Square and St Matthews area of the town by creating a barrier to footfall and decreasing visibility from Park Street/The Bridge. This issue could be accepted if it is clearly a temporary move to facilitate the enhancement of Old Square / St Matthews but if it is, or perceived as, a permanent move we believe it will severely detract from Old Square / St Matthews as a retailing location therefore adversely affect values. We welcome the agreement of a new management code for the market and would like to see a copy of the new code. However we believe this must be managed firmly maintaining sight lines to all frontages and the fabric of the stalls so that the market does not detract from the shopping offer during its trading or when it is closed. The current market stalls create a very poor image in Digbeth when not trading and we believe alternatives to leaving the stalls in situ should be investigated to ensure the market enhances and does not detract from the town. We believe the best practice both nationally and internationally for market management should be sought out and the lessons learned applied to Walsall".</i></p>
Market Traders Association	They are prepared to accept the revised location of the market stalls under Option 3 that incorporates the reduction of 8 stalls from Park Street to The Bridge, Bradford Street and Digbeth.

Conclusions

- 6.6 We conclude that whilst most of the key stakeholders give conditional approval to the proposals, several have concerns as to the affect that the relocated stalls will have on the viability of the prime retail locations (Park Street / Bridge Street) as well as the detrimental effect the reduction in footfall will have upon the Digbeth, High Street and George Street area which is already a tertiary area of the retail core of Walsall Town Centre.
- 6.7 From our discussions we observe that on balance, as long as the Market Traders adhere to the new management regime and controls, the stalls are upgraded in terms of construction, the relocation is limited to a three year period (with yearly reviews of the impact on the Town Centre) and the Council are prepared to make alterations to the locations of the stalls if deemed reasonably necessary, then we would advise that most parties would not object to a relocation proposal which limits impact on prime retail frontages.
- 6.8 The following section outlines the options that we have considered for the location of the market.

7. OPTION GENERATION IN RELATION TO MARKET LOCATION

The Options

7.1 The configuration of Walsall Town Centre and the size of the market means that there are relatively few options for relocation. We have assumed that the relocation will be temporary for the period of three years pending redevelopment of St Matthew's Quarter. The following three options for relocation of the market have been identified:

- Option 1: Market to remain in its current location at Digbeth (see Figure 2.1);
- Option 2: Market to be temporarily relocated (for a period of up to three years) to the area around the Bridge (Variant A) as proposed by the Council (see Figure 2.2); and
- Option 3: Market to be temporarily relocated (for a period of up to three years) to a location that is a variant (B) of Option 2 as developed in discussions with the consultant (see Figure 2.3).

Description

7.2 We provide below a description of each option:

Option 1 (Figure 2.1)

7.3 The market is currently located in the Digbeth area of Walsall Town Centre, with the majority of stalls positioned around the outside and in the middle of the open market square. The stalls go no further than the bridge that links the Old Square Shopping Centre with Digbeth House and the property to the south owned by Norton and Proffitt and St. Modwen's.

7.4 The market then stretches in a linear fashion along Digbeth, with stalls on both sides towards the Bridge and currently ends before The Bridge opens out in the centre of the town. There are also additional stalls located along one side of Lower Hall Lane.

Option 2 (Figure 2.2)

7.5 The Council's (Variant A) for the potential relocation of the market provides a more 'spread out' market pitch. In this option, the market graduates westwards towards, and into, the area identified as the prime retail pitch (Park Street) where the highest Zone A rentals of the town centre are demanded. This option places some 16 (widely spaced) market stalls in Park

Street, with circa 18 retail frontages directly affected by the installation of these stalls. It also introduces a cluster of food traders in the public open space of The Bridge.

- 7.6 A few market stalls are set to remain on the western edge of the Old Market Square in Digbeth, with stalls retained in a linear format in the direction of, and into, The Bridge central square. All but 4 stalls would be removed from Lower Hall Lane, with those remaining being located on the corner with Digbeth. The remaining stalls are located in a linear fashion along Bradford Street, as far as Bradford Place.

Option 3 (Figure 2.3)

- 7.7 Option 3 is a variant of Option 2 that has been developed with Council Officers following early advice from the consultants on the implications of Option 2. The main change is that the market in this option is further compacted and the number of market stalls positioned along Park Street has been reduced from 16 (in Option 2) to 8 to reduce the potential adverse impact on the Park Street prime retail frontage. This option places 8 market stalls in Park Street in front of the 'dead frontage' of the Bank and opposite 4 retail units. Ideally, the consultant would prefer an option that removes all market stalls from Park Street, but given problems identifying alternative locations, this variant is considered to be an acceptable compromise worthy of assessment.
- 7.8 The following section outlines the evaluation process undertaken for each of the above options using a set of criteria drawn from policy and PPS6 / draft PPS4 town centre health check guidance.

8. EVALUATION OF MARKET RELOCATION

Introduction and Approach

8.1 In this section we evaluate the options described in Section 7 against a range of criteria. The criteria we have adopted for evaluation of the options are as follows:

Assessment Criteria

Planning

- i) **Compliance with Development Plan** – Any planning application for relocation of the market would need to be considered against the provisions of S38 of the Planning and Compulsory Purchase Act 2004 which requires an application to be determined in accordance with the provisions of the Development Plan unless material considerations indicate otherwise. In this case, the Development Plan, as described in Section 3, comprises the West Midlands Regional Spatial Strategy (January 2008) and the Walsall Unitary Development Plan (UDP) 2005. We draw upon the earlier planning policy section in assessing the options against this criterion; and
- ii) **Other material considerations** – PPS6 and Draft PPS4 are ‘other material considerations’ and set out the indicators for assessing town centre vitality and viability. We have used these indicators as a means of assessing the impact of relocation of the market on the vitality and viability of the town centre and on the St Matthews Quarter under the three options.

Other material considerations include non-planning related matters such as town centre security and management criteria which we have adopted and described below.

Impact on Conservation Areas

8.2 We assess this having regard to the impact of the market in its different locations on the appearance and character of the town centre Conservation Areas, particularly the Bridge St Conservation Area and the Church Hill Conservation Area drawing upon national planning guidance in PPG15 Planning and the Historic Environment.

Accessibility

- 8.3 This is assessed in terms of the need to achieve the necessary vehicular access, maintaining emergency access and pedestrian flows.

Town Centre Security and Safety

- 8.4 The assessment relates to the implications of the different options for CCTV surveillance, visibility, and opportunities for crime, matters raised in Policy comments on the original (now revoked) planning application.

Town Centre Management

- 8.5 We consider the implications of the three options for management considerations including refuse collection, recycling disposal, street cleansing and wider environmental considerations. We also address matters such as storage of market goods and operating days.

Consultation Responses

- 8.6 Here we assess, in particular, objections raised during the previous consultation on the planning application to move the markets (subsequently revoked) and consider more recent responses received to the consultation process undertaken as part of this assignment.

Approach

- 8.7 In accordance with the requirements of the brief, we have assessed the performance of the three options in the following scenarios:
- i) Impact on the vitality and viability of the town centre as a whole;
 - ii) Impact of each option in relation to the St Matthews Quarter of the town centre if the redevelopment proposals proceed; and an assessment of the impact on the St Matthews Quarter, if the redevelopment proposals do not proceed;
 - iii) Impact of the options on the market whether it moves or not; and
 - iv) The impact of changes in the management regime of the market.
- 8.8 We consider each of the above scenarios in turn, setting out a commentary on the performance of each option against the criteria outlined above before summarising the assessment in matrix form at the end of each scenario. Our summary matrix scores the performance of each option against the relevant criteria, adopting an approach similar to that

used in sustainability appraisals to enable both quantitative and qualitative judgements to be made. In our assessment matrix, the following symbols have been adopted:

++	indicates strong positive impact;
+	indicates positive impact;
0	indicates neutral impact;
-	indicates negative impact;
--	indicates strongly negative impact.

- 8.9 The allocated scores are based on our professional judgement, having regard to the evidence in preceding sections of this report and our assessment as set out under each criterion in the written text of this report.
- 8.10 The first evaluation of options is in relation to the impact of each option on the performance of the town centre as a whole.

i) Impact of the Options on the Performance of the Town Centre as a Whole

- 8.11 Our analysis of performance of the three options against each of the evaluation criteria is as follows:

Development Plan

- 8.12 Section 3, Policy Context, clearly demonstrates regional planning policy support to Walsall Town Centre as one of the region's 25 strategic centres. At the Walsall UDP level, there is policy support to the Primary Shopping Area which includes Park Street / Digbeth / High Street and extends to Bradford Street, Old Square and The Saddlers Centre. There is also support for improvement to the Market and for further comparison/retail investment in the opportunity area around Digbeth and Old Square (Policy WA10).
- 8.13 In terms of Option 1, retaining the market in situ, this is consistent with the Development Plan in that the market remains in the location envisaged but fails to achieve improvements to the market. As regards Options 2 and 3, which both seek to move the market, the policy commitment to improving the market is absolute and makes no reference to location. Whilst

the supporting text (which carries less weight than the policy) assumes the market would stay in its present position, there is nothing in the policy that would prevent its relocation. It is our opinion, therefore, that both Options 2 and 3 would be consistent with Policy WA2 on markets.

- 8.14 The Development Plan also contains a range of general policies which seek, inter alia, to promote sustainability, social inclusion, good design and improve the vitality of the town centre. In our opinion, all three options would satisfy these policies although, as we demonstrate below in our assessment of other criteria, this is likely to be to differing degrees.

Other Material (Planning) Considerations

- 8.15 PPS6 Planning for Town Centres and Draft PPS4 Planning for Prosperous Economies do not form part of the Development Plan, but are important material considerations as they express existing and emerging Government policy on retailing in town centres. As indicated in Section 3 and our analysis in Section 5, these policies establish the key criteria for determining the vitality and viability (“health”) of existing town centres.
- 8.16 Our methodology for assessing the options closely follows the criteria in PPS6 and Draft PPS4. It follows that the conclusions of our vitality and viability assessment should be given considerable weight in reaching any planning decision on the future of the markets in the town centre. In this case, it will be noted that the material considerations of National Planning Policy Statements support the policies of the Development Plan in relation to the town centre.

Vitality and Viability

- 8.17 There is general support for the role of the market as a positive component of the town centre as evidenced by consultation responses. There have been no calls for the market to be closed. The main issues are about where the market is best located within the town centre and how it is operated. We assess the implications of the three options for the overall impact on the vitality and viability of the town centre below.
- 8.18 The PPS6 assessment of the town centre with the market in situ (Option 1 as analysed in Section 5) reveals a picture of declining vitality and viability. This is as a consequence of a number of influences including:
- The national (and international) economic recession;
 - Competition to the strength of Walsall town centre from other regional strategic centres; and
 - The decline in the market arising from lower footfall, poor management and competition from low value operators.

- 8.19 A 'do nothing' scenario, as represented by Option 1, is likely to lead to a further inevitable decline in the market; which will have consequent adverse impact on the future of Walsall town centre.
- 8.20 The impact of Option 2 on the vitality and viability of the town centre as a whole is assessed below having regard to the criteria of PPS6 and based upon that set out in Annex A of draft PPS4. In this option, the market would move and be extended into Park Street, Bradford Street and Bridge Street as well as remaining in part of Digbeth.

Table 8.1: Vitality and Viability Assessment for Option 2

<i>A1 Diversity of Main Town Centre Uses:</i>	There is likely to be a gradual reduction in diversity as a consequence of longer term adverse impact of the market on prime shopping frontages. This may be off-set in part by a more vibrant market if improved management measures succeed.
<i>A2 Amount of Retail, Leisure and Office Floorspace in Edge of Centre and Out of Centre Locations:</i>	We consider there is no differentiation between the options in this regard.
<i>A3 Capacity for Growth or Change of Centre in the Network:</i>	If the market as proposed in this option adversely affects the prime retail frontages along Park Street and the Saddlers Centre to the extent that they start to decline, this will impact on Walsall's ability to compete with other regional centres for investment (a very real threat), thereby threatening its status in the regional hierarchy.
<i>A4 Retailer Representation:</i>	This could be adversely affected if the attractiveness of Park Street as a retail location deteriorates. This could impact also on the Saddlers Centre. Conversely, leaving the existing market place vacant creates a negative impression and could cause retailers in that area to pull out exacerbating the currently high vacancy rates.
<i>A5 Shopping Rents:</i>	Rents around Old Market Square / Digbeth could decline as a consequence of loss of footfall although these are in any event secondary locations pending the redevelopment proposals. Rents in Park Street may be adversely affected over time if market stalls are perceived to hide views of shop frontages and/or adversely affect the 'quality' of the area.
<i>A6 Vacant Street Level Property:</i>	Existing vacancies are mainly, but not exclusively, in secondary locations; these will remain difficult to let irrespective of where the market locates. Vacancies in Lower Hall Lane may increase as a consequence of relocation of the market. There are a few vacant properties in Park Street which are likely to be more difficult to let if obscured by permanently fixed market stalls.
<i>A7 Commercial Yields on Non-Domestic Properties:</i>	In our judgement, yields on properties in the prime location are likely to be adversely affected over time as a consequence of relocation of the market to Park Street. Yields on Bradford Street and Bridge Street, where rents are lower, are proportionately less likely to be affected. Yields on Lower Hall Lane will also be affected as this route will lose footfall.
<i>A8 Land Values and Time Key Sites Remain Undeveloped:</i>	Land values in the prime rental area may be adversely affected by extending market stalls into Park Street (The impact on the proposed Norton and Proffit redevelopment at Digbeth / High Street is examined later).
<i>A9 Pedestrian Flow:</i>	This may be affected by congestion and elongation of the market over

	a wider area. The Market itself may attract more shoppers. Any decline in the success of the prime retail pitch may start to impact on flows, but this would be over a longer period of time. Flows in the Digbeth area would fall.
<i>A10 Accessibility:</i>	Accessibility to the town centre would not be materially affected.
<i>A11 Customers views:</i>	As the previously approved scheme to relocate the market (similar to Option 2) was not implemented, few customer views are available. However, the main comments relating to the previous application were received from investors / retail operators with the Saddlers Centre voicing opposition to the proposed relocation on grounds of impact on Park Street; and Threadneedle Property opposing the relocation of the market away from the Old Square / Digbeth area.
<i>A12 Safety/Crime:</i>	It is noted that the Police objected to the previous relocation on the basis of increased occurrence of crime and restrictions on CCTV surveillance.
<i>A13 Environmental Quality:</i>	Proposals to improve management and appearance of the stalls should greatly improve environmental quality provided that they are implemented and the improved management regime is maintained and enforced strictly.

(Source: GVA Grimley, 2009)

- 8.21 Overall, the main concerns arising from this PPS6 assessment of vitality and viability of the town centre under Option 2 are those relating to the likely adverse impact of locating the market stalls along the prime retail pitch in Park Street and the Police concerns about safety and security.
- 8.22 Our assessment of the vitality and viability of the town centre under Option 3, (which is similar to Option 2 except for the compaction of the market layout and removal of some 8 stalls from Park Street), is as follows:

Table 8.2: Vitality and Viability Assessment for Option 3

<i>A1 Diversity of Main Town Centre Uses:</i>	A positive impact is likely as a consequence of affording greater protection to the prime retail pitch.
<i>A2 Amount of Retail Leisure in Edge of Centre and Out of Centre Locations:</i>	No difference is anticipated between the options.
<i>A3 Potential Capacity for Growth or Change of the Centre in the Network:</i>	This option creates better conditions for Walsall town centre to maintain its position in the retail hierarchy by helping to protect the prime street within the central retail area.
<i>A4 Retailer Representation:</i>	There is a better opportunity to re-let vacant units in the main (and most attractive part of the) shopping centre as a consequence of keeping most of Park Street clear of stalls.
<i>A5 Shopping Rents:</i>	Rents in prime areas would be largely protected. There may be mixed impacts in rents elsewhere, e.g. Bridge Street / Bradford Street, may see increased footfall but may also experience partially obscured shop frontages. Lower Hall Lane and Old Market Square are likely to be adversely affected given less footfall when the market moves.
<i>A6 Vacant Property:</i>	See response to A4 above.

<i>A7 Commercial Yields:</i>	This option optimises the potential for yields to improve in the prime retail area. Values and yields are likely to continue to deteriorate in the Old Square / Digbeth area arising from fewer market stalls and also as a consequence of the continued deterioration in environment and increasing vacancies in advance of redevelopment.
<i>A8 Land Values and Length of Time Sites Remain Undeveloped:</i>	Land values are expected to be maintained and may increase in the town centre apart from those areas in parts of Digbeth and Lower Hall Lane where redevelopment is proposed. See later for the St Matthew's Quarter assessment.
<i>A9 Pedestrian Flow:</i>	These are likely to fall further in parts of Digbeth and Lower Hall Lane when the market relocates.
<i>A10 Accessibility:</i>	No significant impact on accessibility to the town centre is envisaged.
<i>A11 Customer Views:</i>	Not known in relation to this option.
<i>A12 Perception of Safety/Crime:</i>	There may continue to be some concerns about congestion in the Bridge Street/Bradford Street area; with less concerns over Park Street due to fewer stalls.
<i>A13 Environmental Quality:</i>	This will be the same as for Option 2.

(Source: GVA Grimley, 2009)

- 8.23 Overall, our assessment has indicated that the indicators of vitality and viability for the town centre in Option 3 would be more positive than for Option 2 due to greater compaction of the market which will help to limit potential adverse affects upon the retail attractiveness of the prime Park Street frontages.

Market Viability

- 8.24 Under Option 1 the market will continue to decline as it is understood that improvements to the market management and investment in improvements to the stalls will not take place in the context of a declining market without the opportunity to increase footfall and hence patronage.
- 8.25 Options 2 and 3 both locate the market in areas of higher footfall, therefore improving potential for better trading conditions and creating the right conditions for further investment in the market given improved viability.

Accessibility and Free Flow of Pedestrians

- 8.26 Our PPS6/draft PPS4 assessment indicates that:
- Accessibility to the town centre would not be adversely affected by any of the options;
 - Pedestrian flows would gradually decline over time as a consequence of Option 1 (because the town centre will continue to weaken with a declining market); would not decline as a consequence of Option 2 in the short term but might do over time if the prime retail area were to be adversely affected; and would be affected less by Option 3 which

seeks to maintain the attractiveness of the prime area. Potentially both Options 2 and 3 may create pedestrian congestion on Bridge Street / Bradford Street as a consequence of the relocation of market stalls and introduction of service vehicles; and

- Access for the disabled – we understand this is a matter for concern and would need to be addressed by all three options in terms of parking and protection of safety. This should be a priority issue for Walsall MBC.

Amenity

- 8.27 If the market were to remain in situ under Option 1, significant issues over environmental amenity would continue to arise, particularly arising from the current poor appearance of the stalls and operational concerns, including rubbish collection. This is because under Option 1 we understand that further investment in the market is unlikely to occur.
- 8.28 If the market were to relocate as per the Council's suggestion (Option 2) general amenity in the town centre should be improved by further investment and refurbishment of the market stalls, although amenity may be slightly affected by increased congestion in busier sections of the main pedestrian routes.
- 8.29 In Option 3, where the market moves but is not extended as far into Park Street, the amenity considerations are assessed to be similar to those in Option 2, hence this is a neutral factor in terms of distinguishing between Options 2 and 3.

Town Centre Security and Safety

- 8.30 In Option 1, matters relating to safety are unlikely to be any worse than at present. In relation to Option 2, it is noted that the Police previously raised concerns over crime and safety. A further consideration is the implication of Options 2 and 3 for the Old Market Square area which would experience a significant drop in pedestrian activity as a consequence of relocation of the Market. The environment here is already poor and could become a less secure area if further vacancies around the Square were to occur.

Implications for the Conservation Area

- 8.31 The appearance of the Church Hill Conservation Area is already marred by the poor quality of buildings in Old Market Place looking towards the Conservation Area. The relocation of the market into the heart of the Bridge St Conservation Area should not significantly impact on appearance and character of the Conservation Area provided enhanced stalls and a much improved management regime are introduced.

Town Centre Management Considerations

- 8.32 Option 1 would see a continuation of the existing town centre management regime. We assume that the existing recycling, rubbish removal and street cleansing operations would be unaffected.
- 8.33 In Options 2 and 3, it is assumed there would be an enhanced town centre management regime incorporating the new markets' Code of Practice. In these terms, both options would have positive benefits to the town centre overall.
- 8.34 All three options assume that street cleaning, the storage of market traders goods (in the existing market store) and the days of market operation would remain unchanged.

Consultation responses

- 8.35 Mixed responses were received to the previous proposals to relocate the Market with objections to both its relocation away from Market Square and to its relocation to Park Street. Recent comments received point to the need to protect Park Street prime frontages; ensure improved market management and the introduction of a wider market offer.

Summary of Impact of Options on the Town Centre

- 8.36 Our assessment of the impact of the three options for the market's location on the town centre as a whole is summarised in Table 8.3

Table 8.3 Summary of assessment of options for market location on the overall town centre

Assessment Criteria	Option 1 Market retained in situ	Option 2 Market relocated – WMBC scheme	Option 3 Market relocated – revised scheme
1. Compliance with Development Plan	-	0	0
2 Impact on Vitality and Viability of town centre	-	-	+
3 Market viability	--	++	++
4. Accessibility and free flow of pedestrians	0	0/-	0/-
5. Amenity	-	+	+
6. Town Centre security and safety	0	-	-
7. Conservation Area implications	-	0	0
8. Town Centre management, eg. street cleaning, rubbish removal, storage of market goods etc	-	++	++
9. Objections/consultation	Mixed	Mixed	Further consultation required

(Source: GVA Grimley, 2009)

Conclusions on Scenario 1: Impact on Town Centre overall

- 8.37 Whilst the evidence indicates continuing support for the market as an important element of the town centre's overall vitality and viability, the continuation of the market under Option 1 without improvements and further investment would adversely impact not only on the vitality and viability of the market itself, but it would also continue to drag down the overall appearance and vitality of the town centre as a whole, albeit confined to one part of the Primary Shopping Area.
- 8.38 We conclude that leaving matters as they currently stand under Option 1 is not an option that Walsall MBC can afford to pursue. Ultimately, inaction would result in the market closing down. Similarly, the relocation of the market as envisaged under Option 2 represents a potentially serious risk to the future vitality and viability of Walsall Town Centre through its impact on the attractiveness of the prime retail pitch. The temporary relocation of the market to this area, with no certainty as to its future long term location, would not be an option that we could recommend to Walsall MBC bearing in mind the relatively fragile nature of the town centre in its regional context.
- 8.39 On the analysis above, we conclude that Option 3 (with its lesser impact on Park Street) would provide the most favourable commercial solution for the temporary relocation of the market in the context of the future vitality and viability of the town centre as a whole.
- 8.40 We now turn to consider Scenario 2 which focuses specifically on the impact of each option in relation to the St Matthew's Quarter of the town centre.

ii) Impact of Each Option in Relation to the St Matthew's Quarter of the Town Centre

ii-a) Impact on St Matthews Quarter if the redevelopment proceeds

- 8.41 In this scenario, we have assumed that Norton & Proffitt/ St. Modwen's will bring forward a scheme for redevelopment of their substantial land holding on the south side of Digbeth, with a retail led scheme. The current development brief for the site proposes a retail scheme incorporating a new, permanent home for the market. If this redevelopment materialises, it would secure the future of the markets within a well designed, purpose built market facility situated within a new retail environment. It is assumed that if such a scheme were delivered, Options 2 and 3 would be redundant. In the short term, however, the market would have to relocate under either Option 2 or 3. This would have a negative short term impact on the St

- Matthews Quarter due to the loss of footfall and impact on vitality of the area. Such an impact is, however, unavoidable if the benefits of redevelopment are to be gained.
- 8.42 There are clearly significant and substantial benefits to the St Matthew's Quarter arising from such a redevelopment scheme. For these benefits to be compared with other scenarios, we have assessed this redevelopment scenario against our assessment criteria, and the outcomes are assessed as follows:
- 8.43 **Compliance with Development Plan:** The redevelopment would secure the implementation of Policy WA10 of Walsall UDP; this would support planning policy objectives.
- 8.44 **Impact on Vitality and Viability:** New retail floorspace in this area would offer greater choice and diversity within the St Matthew's Quarter, as well as within the town centre as a whole. It would help to 'rebalance' and diversify the retail offer, with a more even weighting between the northern and southern parts of the primary shopping area. As the new market stalls would be laid out as part of a well-designed, comprehensive scheme, we do not envisage the same letting difficulties arising from obscured shop frontages as we consider will happen if the market is imposed or 'retro-fitted' into the existing Park Street area. In this scenario, the impact of the market on vitality and viability within the redevelopment scheme would be entirely positive.
- 8.45 **Market Viability:** This would benefit from the purpose built facility, increased footfall and improved management.
- 8.46 **Accessibility and Free Flow of Pedestrians:** A redeveloped St Matthew's Quarter would be highly accessible, and be designed to ensure high pedestrian flows without creating unacceptable levels of congestion.
- 8.47 **Town Centre Security:** This would be enhanced through new security measures, such as CCTV within the redevelopment scheme.
- 8.48 **Impact on Conservation Area:** There would be clear benefits for the Conservation Area arising from the improved appearance of the area with removal of the ugly and tired shop units and a new management regime within the St Matthew's Quarter.
- 8.49 **Town Centre Management:** A well designed scheme, coupled with an improved market management regime would significantly improve the general appearance and attractiveness of the St Matthew's Quarter.
- 8.50 Clearly, a redevelopment scheme including the market, as assessed above, would bring significant benefits both to the town centre as a whole and to St Matthew's Quarter. We are

aware, however, from a recent representation from St Modwen on 17th September 2009 (see Appendix 3) that they are no longer planning to include accommodation for the market in their scheme. In this situation, we have considered an alternative scenario as described below.

ii-b) Redevelopment proceeds, but without the Market as an integral element

- 8.51 We have given consideration to whether the market could stay in its existing location and be operated independently of the redevelopment scheme. In practice, however, the market would have to move from Old Market Square in order to facilitate redevelopment. Thus, when redevelopment commences, the market would have to move to a location as incorporated into either Option 2 or 3 on a temporary basis.
- 8.52 In the longer term, once the redevelopment is complete – and assuming it were to make no specific provision for the market – the Council would have to consider whether the new public realm could accommodate the improved market and whether it could operate without unreasonably obscuring the new shop frontages.
- 8.53 Clearly, this situation would deliver redevelopment in the St Matthews Quarter with the attendant benefits of enhanced environment, improved shopping offer and diversity, but it must be emphasised that this would represent a significant lost opportunity to secure a permanent, well designed home for the market. In the consultant's opinion, it is preferable for the market to be accommodated within a purpose designed scheme rather than to locate permanently under either Options 2 or 3. Purpose built accommodation would overcome issues of storage and accessibility, and provide for enhanced security, addressing the concerns raised by the Police. In short, it offers a better solution than making the market "fit" into the existing street scene, which will always be a sub-optimal solution.
- 8.54 It is evident from St Modwen's response that they support a well managed, vibrant market, and that they want it to stay in the St Matthew's Quarter. It appears the removal of the market from their scheme is a direct response to the Council's decision to relocate the market, and to the continuing uncertainty about its future. The Council could re-open discussions with St Modwen to seek to reintroduce the market into the redevelopment scheme. An alternative open to the Council, if it wishes the market to remain in the St Matthew's Quarter, is to exercise its option to acquire the site from the developers. The recent report by Drivers Jonas will assist the Council in reaching a decision on this matter. This course of action would leave the way open to design a redevelopment scheme incorporating the market to achieve the benefits identified above, although there would be a significant risk, in current market conditions, that such a scheme would be further delayed. We examine this prospect in the following sub-section.

- 8.55 A second alternative open to the Council would be to continue discussions with Threadneedle about the potential to create an indoor market within the vacated Tesco unit after 2011. This could provide an alternative long term answer to the future location of the Market Hall and would further enhance the footfall and shopping offer of the Old Square and the adjacent Digbeth and High Street areas. This could be an expedient solution, particularly if the Norton and Proffitt scheme is either delayed or does not incorporate the market. It is unlikely, however, to achieve all the benefits of a purpose built solution to improving the market.

ii-c) Impact on the St Matthew's Quarter if redevelopment does not proceed

- 8.56 This situation is regarded as the likely short-term scenario, arising from the market downturn. However, in the medium to longer term this area is ripe for redevelopment.
- 8.57 If redevelopment does not proceed, the impact on the St Matthew's Quarter is assessed as follows, and summarised in Table 8.4.
- 8.58 **Compliance with Development Plan:** Retention of the market in situ would not achieve the Policy WA2 objective of securing improvements to the market. Options 2 and 3 would achieve improvements to the market, but not as envisaged by the Development Plan Policy, albeit they would not be contrary to this policy.
- 8.59 **Impact on Vitality and Viability of St Matthews Quarter:** The overall vitality and viability of the St Matthew's Quarter will continue to decline if redevelopment does not proceed, and the environment will continue to deteriorate further. Existing shops will suffer further if the market relocates, leading to additional closures and adverse consequences for values and viability.
- 8.60 Option 1 would see a continued decline in the market to the great detriment of the St Matthews Quarter. Options 2 and 3, by retaining a few market stalls within the existing Square, would enable the Quarter to gain some of the benefits of an improved market. Option 3 would retain marginally more stalls, but overall Options 2 and 3 would have similar impacts (marginal) on the St Matthews Quarter.
- 8.61 **Market Viability:** The market would only benefit from relocation through Options 2 and 3, where new investment would be made.
- 8.62 **Accessibility / Free Flow of Pedestrians:** The deteriorating environment, lack of investment and further shop closures would all lead to a fall in pedestrian movement in the St Matthews Quarter area. Accessibility within the Quarter from the rest of shopping area may be adversely affected by relocation of the markets which may act as a barrier to pedestrian movement further south.

- 8.63 **Amenity and Safety, Security and Management:** These would all be adversely affected by the lack of investment within the St Matthew's Quarter. In Option 1, retention of the market would assist in maintaining activity in the area, which improves the perception of safety, but a lack of investment in the market would lead to further deterioration in the security, management and appearance of the area. Options 2 and 3 exacerbate the situation by removing most of the market activity from Old Market Square although improvements to the stalls and management regime would benefit the Digbeth environment.
- 8.64 **Conservation Area Implications:** If redevelopment does not proceed, the biggest loss is the opportunity, through removal of the bridge link, to significantly improve the approach to, and views of, the Church Hill Conservation Area. Option 1 would perpetuate the existing situation which significantly impacts on the character and appearance of the Conservation Area. Options 2 and 3 would secure some improvements to the appearance of the Digbeth end of the St Matthew's Quarter, but would have no real impact on the Church Hill Conservation Area.
- 8.65 **Consultation Responses:** It is evident from previous and more recent consultation responses that redevelopment of the St Matthew's Quarter is strongly supported as a means of delivering uplift within the area, and delivering a permanent solution to the market situation.

Table 8.4 Impact on St Matthews Quarter if redevelopment does not proceed

Assessment Criteria	Option 1 Market retained in situ	Option 2 Market relocated – WMBC scheme	Option 3 Market relocated – revised scheme
1. Compliance with Development Plan	-	0	0
2. Impact on Vitality and Viability of St Matthews Quarter	0	-	-
3. Market viability	--	++	++
4. Accessibility and free flow of pedestrians	0	-	-
5. Amenity and safety	0	-	-
6. Town Centre security and safety	0	-	-
7. Conservation Area implications	-	0	0
8. Town Centre management, eg. street cleaning, rubbish removal, storage of market goods etc	--	+	+
9. Objections/consultation	-	mixed	Not known

(Source: GVA Grimley, 2009)

iii + iv) Impact on the Market itself as a consequence of moving and market management considerations

8.66 If the market remains in situ, without redevelopment taking place, it would continue to decline as the St Matthew's Quarter generally deteriorates from ongoing lack of investment. As indicated earlier, Walsall MBC will not invest in a declining market, in an area where footfall is falling because of a continuing lack of investment.

8.67 The only short / medium term option is, therefore, to move the market so it would benefit from areas of higher footfall. Clearly, moving the market to locations with higher pedestrian footfall levels creates better trading conditions.

8.68 As regards the health and location of the markets, we agree with the comments made by St Modwen in their recent consultation response. In particular, it is worth quoting the following extracts from their letter:

"We believe that a strong market with creative, firm management can become a destination and footfall generator in the town. If the market continues as it is, we fear that it will struggle to maintain occupancy and therefore detract from the retail offer in the town.

We believe that the location and health of the market are linked. A market that is trading poorly will be drawn to the high footfall location in the town to survive. Whereas a market with a confident approach and a clearly defined offer that matches consumer requirements could act as a vibrant draw to new and existing customers to the town, and broaden the retail offer in Walsall."

8.69 In the consultant's view, whilst the existing weak market will inevitably benefit from a move to an area of greater footfall, this is not necessarily the best solution for the location of the market in the longer term.

8.70 Deficiencies in current management of the market are clearly a major factor in its current declining state. The key areas for action are as follows:

- **Market offer** - The introduction of a wider range of goods and traders to improve the offer and attractiveness of the market;
- **Town centre security** – addressing Police concerns over CCTV coverage and crime;
- **Refuse collection, recycling and disposal** - New, more effective arrangements are needed to separate and recycle waste from the market. Better monitoring is required by market staff during trading hours to remove rubbish if necessary;

- **Street cleansing** – the current market area is heavily soiled and very untidy at the end of each trading day. Substantial effort (and a change in behaviour of market traders) will be required to resolve this key issue. Stringent monitoring and enforcement will be an essential element of this;
 - **Storage of goods** – the efficiency of the use of the Lower Hall Lane Market Stores will need to be reviewed in relation the new market location;
 - **Market upkeep and repair** – we note that the stalls will be repaired and refurbished when moved. However, these works will need to be checked and the appearance of the stalls kept in first class condition if the environmental quality of the centre is to be enhanced; and
 - **Vehicle access** – the routes and requirements for delivery vehicles servicing the market will have to be strictly controlled and enforced by Traffic Regulation Order as there will be greater potential for pedestrian/vehicular conflict than with the present market. Pedestrian routes should remain free of obstruction at all times.
- 8.71 By tackling the range of goods on offer, appearance and tidiness of the market, it should become a stronger draw in its own right, as experience in other towns would indicate. Such changes in culture and mix of traders will, however, take time to become accepted and bear fruit. Relocation of the market to ensure its survival is therefore essential in the short term, particularly having regard to its current poor environment within the (unimproved) St Matthew's Quarter. In the longer term, however, once new management practices become the norm, and the market becomes stronger, consideration should be given to whether its temporary home is the most suitable, or whether a purpose designed pitch within a redeveloped St Matthew's Quarter is a preferable option both for the longer term viability of the market and in order to ensure that the town centre as a whole retains its retail attractiveness for investors, occupiers and customers alike. This calls for a constant monitoring process, we would suggest that the first review commences some 12 months after the Market relocates.
- 8.72 Two potential solutions have been considered; one within the Norton and Proffitt scheme and the other within the Threadneedle scheme. Ultimately, the consultant's opinion is that the most preferable permanent home for the market lies within an improved St Matthew's Quarter.

Conclusions from Option Analysis

- 8.73 Our analysis leads us to the following conclusions:
- The market plays a small but important role in the town centre. Option 1, leaving the market in situ, would lead to the markets continued decline and eventual closure with

consequent adverse impact on the town centre as a whole. Option 2 presents a potentially significant risk to the prime retail pitch on Park St which, in turn, represents a risk to the health of the town centre. Option 3 would facilitate improvements to the market but with a much less significant risk to the prime retail area. It is therefore the consultant's preferred option in relation to impact on the town centre.

- As regards impact on the St Matthew's Quarter, the market would have to relocate if redevelopment proceeds. Relocation would impact on footfall and vitality in the St Matthew's Quarter but such temporary impacts would be offset by the substantial benefits of redevelopment for the Quarter, which will also uplift the town centre as a whole.
- A potentially significant issue raised by the consultant's consultation as part of this work is the prospect that the Norton and Proffitt redevelopment scheme may not now make provision for the market as originally intended. Clearly, Walsall MBC will need to consider very carefully whether the opportunity to secure a permanent situation to the location of the market should be lost. It is the consultant's opinion that well designed, permanent accommodation as part of a comprehensive redevelopment scheme to the north of Old Market Square is the preferred solution.
- The analysis confirms that the market itself would benefit substantially from the proposed relocation under either Options 2 or 3. A significant part of the benefit would be derived from investment in new stalls and improved management alongside the benefit of additional footfall to enhance trade. Indeed, relocation on a temporary basis is necessary to achieve this much needed investment in the market and act as the catalyst to introduce new management and a wider range of goods on offer. A revived and invigorated market can then be a truly positive component within the town centre in a purpose designed and attractive permanent location.
- A monitoring process should be instigated to assess the impact of the relocation process, with the first review some 12 months after the market moves.

8.74 The final section of this report summarises the main findings and identifies the key recommendations from this Study.

9. CONCLUSIONS AND RECOMMENDATIONS

- 9.1 The retail 'health check' analysis in Section 5 confirms that Walsall Town Centre is suffering badly from competition from other regionally important centres. It is important that the fragility of the centre is recognised and that relevant policy initiatives (such as relocating the market) are tested fully to ensure that they would not exacerbate this situation.
- 9.2 The market has been declining for several years – this is due to national trends and local factors. Competition from discount operators is a key issue, but equally poor management and business practices, as well as lack of diversity in the products sold, have also had a major impact. Nevertheless the existing market continues to add value particularly in terms of broadening the town centre 'offer' and contributing toward social inclusion with the sale of 'value for money' goods for the elderly and other customers on low income.
- 9.3 The analysis demonstrates that the market plays a small (2% of turnover) but significant role in the vitality and viability of the town centre. However its role is reducing as its viability continues to decline. Equally, it is evident that current management controls are not effective and that its unsightly appearance is having a detrimental effect upon the environmental quality of the town centre and St. Matthew's Quarter, in particular. The effectiveness of the operational and management regime in relation to the market should be a central consideration in any relocation proposals.
- 9.4 If the market were to remain in situ and in its current state, in our judgement it would continue to decline in appearance and viability. This, when combined with the deterioration in appearance of the shops and public realm in the Old Market Square, would increasingly detract from the vitality and viability of the town centre as a whole, with the most direct, and adverse, influence upon St. Matthew's Quarter.
- 9.5 In order to ensure the survival of the market, it is critical that its viability is enhanced. This rationale underpins its relocation to busier parts of the town centre where passing trade will be higher than in Old Market Square. In this report we explore two options (2 and 3). Option 2 – the Council proposals – moves the stalls to the Bridge, Park Street, Digbeth and Bradford Street. Option 3 – the consultants revised option – is broadly similar but displays one key difference in that the number of stalls in Park Street has been compacted and reduced to lessen the negative impact upon the commercial attractiveness of the prime retail pitch (Zone A rents) in Park Street. Ideally, it is advised that all stalls should be removed from this location, but the plan associated with Option 3 provides a reasonable compromise).

- 9.6 The consultant's advice is that the proposals in Option 2 affecting a large section of Park Street would have a detrimental affect because:
- The stalls could obscure shop unit frontages and hamper the free flow of pedestrians.
 - The presence of the market would make the units more difficult to let to high quality occupiers.
 - Unless there is a significant improvement in the management regime (and enforcement) from the outset, the quality of the public realm could suffer, thereby reducing the shopping experience in the centre's prime shopping street.
 - It could be unwise when the 'health' of the town centre is so fragile, to introduce an initiative that could adversely affect the viability of the most 'attractive' part of the town centre retail offer. Uncertainty of this type should be avoided if possible.
 - If the market were to be retained in Park Street as proposed, on a permanent basis (five years plus), the impact could manifest itself in low rent increases and/or occupiers relocating within, or outside, the town centre, thus affecting both retailers and investors.
- 9.7 Whilst there remain some stalls in Park Street in Option 3, these are halved in number and far less strung out, thereby minimising the adverse impact upon active retail frontages.
- 9.8 As far as the Saddlers Shopping Centre and The Bridge are concerned, it is judged that the relocated market is likely to have mixed impacts. On the one hand it should increase footfall to the benefit of some traders, but on the other hand may obscure frontages, increase congestion and affect the attractiveness of some units. Much will depend upon the quality of improvements to the market and robust enforcement of the management regime. In relation to the Bridge and Bradford Street, it will be important to address the Police concerns and ensure that safety is not compromised.
- 9.9 The impact of the relocation of the market on the St Matthew's Quarter was touched upon earlier. If the proposed redevelopment does not proceed, then the market and surrounding area will continue to decline. Should St Modwen's / Norton and Proffitt proceed – and agree to accommodate the market in the new scheme – then this will have a positive impact upon the town centre's vitality and viability. In this scenario, it is envisaged that the development scheme will be designed specifically to maximise the synergies between the retail shopping and market offers. In addition, new, strict management requirements should be put in place to control any negative impacts upon environmental quality.
- 9.10 We note that St Modwen/Norton and Proffitt are currently saying that the market will not be accommodated in the St Matthews Quarter redevelopment. On this basis, the only viable scenario would be to retain the market in the locations proposed in Option 2 and 3 on a

permanent basis. On balance, we would not support this solution for commercial and operational reasons. In the consultant's view, it would be preferable to incorporate the market into a purpose designed market facility constructed as part of the new St Matthew's Quarter scheme. We view this as the most appropriate solution which would overcome concerns around retro-fitting the market into existing shopping streets with the issues of servicing, security, management and local objections that this will bring. An alternative, and in our view less satisfactory alternative, would be to locate part of the market within the Threadneedle scheme as part of a major refurbishment scheme, post Tesco relocating in 2011.

9.11 As regards the market itself, the evidence supports a continuing trend towards its decline, a view argued strongly by the Market traders themselves. We concur with the judgment that radical – and urgent – action is necessary to address this decline otherwise the market will continue to lose traders and become demonstrably less viable. The proposed relocation should help to improve the viability of the market by giving it a more central position. However, we would contend that the impact of the relocation should be reviewed after 12 months to assess the consequence for:

- The viability of the market;
- The impact upon St Matthew's Quarter;
- The impact upon the vitality and viability of the wider town centre; and
- The effectiveness of the operational market management arrangements.

9.12 The relocation of the market will inevitably lead to the further decline of the (un-redeveloped) St Matthew's Quarter. This will result in more vacant units and a deteriorating public realm/shopping environment. This air of neglect will, if not addressed, start to permeate the centre as a whole. For this reason, the Council is advised to initiate proactive discussions and investment, as appropriate, at Old Market Square to help to kick-start regeneration of this area, with the implementation of interim improvements to minimise the adverse effects upon the adjoining areas of Digbeth, Lower Hall Street and High Street. These measures might include public realm enhancements, fiscal incentives to occupy vacant units, and new security initiatives to prevent further deterioration of buildings and vandalism.

9.13 Finally, the consultant would emphasise the priority we attach to the implementation of effective and efficient market management arrangements. Our inspections of the current market have revealed failings that have resulted in negative impacts upon the environment of the town centre. The main areas for consideration (as discussed in Section 8) include improvement of::

- The market offer;

- Town centre security;
- Refuse collection, recycling and disposal;
- Street cleansing;
- Storage of goods ;
- Market upkeep and repair; and
- Vehicle access..

Recommendations

9.14 Our key recommendations are:

- i) The principle of temporarily relocating the Walsall Market to a more central location is endorsed to support its viability following several years of decline.
- ii) The relocation should be reviewed after a 12 month period to explore the implications and impacts of the initiative (refer to paragraph 9.11 above for further details).
- iii) Option 3 (the consultant's proposals) should be adopted. This will reduce the impact of the relocated market upon the commercial attractiveness of Park Street, the prime retail area in the town.
- iv) Given the fragility of Walsall town centre from a retail perspective, policy measures should be introduced to improve its attractiveness to consumers, retailers, developers and investors including measures to improve/widen the market offer.
- v) The long-term solution to resolution of a permanent home for the market lies in the redevelopment of the St Matthew's Quarter and the Council has the opportunity to negotiate a satisfactory outcome with the owners and prospective developers of this area. To this end, discussions should be reopened with St Modwen/Norton and Proffitt to explore the potential to reintroduce the market into their proposals and programme for the St Matthew's Quarter scheme. Discussions should also continue with Threadneedle regarding the possibility of locating the market in a reconfiguration of the Old Square Shopping Centre following the relocation of Tesco Metro in 2011.
- vi) Consideration should be given to introducing interim measures to reduce the deterioration of environmental quality in the Old Market Square area following relocation of the Market.
- vii) Priority should be given to the establishment of a robust operational market management regime to minimise the impact of the new market upon the town centre. Key aspects to be addressed are highlighted in paragraph 9.13 of the report.

Appendix 1

Consultancy Brief

Appendix 1 – Consultancy Brief

St Matthew's Quarter, Walsall – Relocation of Walsall Market Brief for Consultancy Advice

1. Background

Project area

The St Matthew's Quarter in Walsall is a key area of the town centre where the Council and its partners continue to encourage retail-led investment, a position reflected in the Unitary Development Plan through policy WA10. All of the St Matthew's Quarter is included within the primary shopping area designation of the Unitary Development Plan. The area is envisaged as the focus for new comparison goods retail investment in the town centre, an improved street market and for an opportunity to improve the town centre's leisure offer. It is anticipated that development in the area will be delivered in a comprehensive manner and connect well with existing retail facilities to improve pedestrian circulation. An urban design brief has been developed to aid this process and to inform the level of high quality design and public realm anticipated in the St Matthew's Quarter. The grade II* listed St Matthew's church, which gives the area its name, provides a key landmark that characterises the town centre's skyline.

The St Matthew's Quarter is divided into two, split by Digbeth/High Street (see attached plans), which forms part of the main north-west to south-east axis upon which the town centre has developed. To the north of Digbeth is the Old Square shopping centre, owned by Threadneedle Property, and currently including Tesco and Debenhams where separate proposals are being considered by the landowners for improvements. To the south of this axis is land owned primarily by Norton & Proffitt/St Modwen, with a lesser interest held by the Council. Walsall's historic outdoor market is located on the Digbeth/High Street axis, with some stalls based in Lower Hall Lane.

Phased approach to development

In June 2007, the first phase of the St Matthew's Quarter redevelopment was realised with the opening of a new Asda supermarket, the largest town centre Asda store in the country. This development was accompanied by a 1,000 space multi-storey car park, a small number of ground floor retail units and 45 apartments.

It was intended that phase 2 of the St Matthew's Quarter development would be delivered in 2007-8 through the conversion of the listed Shannon's Mill building into retail units, offices and 41 apartments by landowner Norton & Proffitt/St Modwen. Unfortunately, a fire destroyed the mill building in August 2007. A phase 3 of development was also planned, without proceeding to the planning stage, to redevelop the remaining Digbeth/Lower Hall Lane part of the St Matthew's Quarter for retail use. Critically, this third phase of development was expected to require part of the land occupied by the existing Walsall market in Digbeth, and therefore it was expected to include the provision of new stalls and supporting infrastructure for Walsall market.

Whilst considered a devastating blow to the regeneration of the town centre at the time, the Shannon's Mill fire has enabled the Council and its partners to consider a larger development opportunity in the area, which is bounded by George Street, Lower Hall Lane and Digbeth. This is effectively the land proposed for the second and third phases of development outlined above, and is indicated on the attached

plan as one site, measuring approximately 4.2 acres/1.7 hectares. Phase 2 was the southern part of the site on the attached plan A, and phase 3 the northern part. However, there is no current planning consent and due to the economic climate, no agreed timetable for the delivery of a consent or development on site.

Decline of Walsall market

Along with most retail markets across the country, Walsall market has seen its number of stalls, currently at about 90 stalls on peak days, and therefore its income, decline significantly over recent years. This decline can be largely attributed to national trends, such as the growing influence of supermarkets and discount retailers, as well as the current economic downturn. However, local issues have also been prominent in this decline, including the Shannon's Mill fire, which led to temporary road closures and disturbance whilst the Mill building was demolished, with similar disturbance temporarily during the construction of the Asda store. Uncertainty and lack of progress with the investment proposals for the wider St Matthew's Quarter redevelopment have also had an impact on the leasing of retail units fronting the market in its current location, leading to an overall deterioration in the area of the town centre occupied by the market.

Due to how the service is currently managed, the decline in Walsall market has had an impact on the overall profitability of the markets service (which also currently includes the management of markets in Bloxwich, Willenhall and Darlaston, and will soon include Brownhills market) and has meant that corporate income targets for the markets service have not been achieved. In order to tackle the decline in Walsall market and to reverse the fortunes of one of the key elements of the town centre retail offer, and to maintain a coherent markets service which can provide some income, a political decision has been taken to support the temporary relocation of the market from its current position to a more central location within the town centre. This more central location has been proposed to concentrate facilities on The Bridge, with some stalls spreading in a crucifix pattern into Digbeth, Bradford Place and Park Street. The attached plan B indicates the current and proposed locations for the market.

Planning history to relocation of the market

In recognition of the decline of Walsall market, a decision was taken in July 2008 by the Council to implement the temporary relocation of the market to the area around the Bridge. In order to deliver this relocation, a 3 year temporary planning consent was secured in August 2008, and steps were made to implement this decision. This planning application was made in advance of a wider planning application for the St Matthew's Quarter.

Unfortunately, following the threat of an application for judicial review into the planning consent from solicitors acting for Threadneedle Property, due to its potential impact on the attractiveness and viability of the Old Square, Counsel advised that the Council should revoke this planning consent. Furthermore, Counsel advised that if a further planning application were to be submitted that failed to address why the relocation is required in advance of a wider redevelopment at that particular point in time, and which could be supported by a robust evidence base, that the Council would be open to further legal challenge. In these circumstances, the Council revoked the temporary planning consent for the relocation of the market in autumn 2008.

2. Consultancy advice required

Given the history to the redevelopment of the St Matthew's Quarter outlined above, there is now a reinvigorated political desire to relocate Walsall market to the area around the Bridge in advance of the critical Christmas 2009 trading period. Therefore, urgent consultancy advice is required to establish if there is an evidential base that can support the temporary relocation of the market to the Bridge. This evidence needs to be able to demonstrate whether the contribution that the market makes to the vitality and viability of the town centre as a whole is significant, and that without relocation, that contribution, and therefore the town centre's vitality and viability, would be severely diminished. In order to reach this position, consultancy advice is required on the elements outlined below.

In recognition of the previous threat of judicial review, the advice will need to be robust in the event of further legal challenge. This is of course subject to any planning application, if submitted, being granted by the local planning authority.

The overall task

A professional judgement and conclusion on whether it may be possible to prove that the contribution that the market makes to the vitality and viability of the town centre as a whole is significant, and that without relocation, that contribution, and therefore the town centre's vitality and viability, would be severely diminished. In so doing, that assessment would consider whether the interests of the centre as a single entity take precedence over the interests of an element that makes up that centre. Alternatively, that professional judgement may conclude that the market's contribution is not sufficiently significant, and/or that the relocation of the market would have a negative impact upon the vitality and viability of the town centre, and should not therefore proceed.

Detailed advice

Detailed advice is required on the following matters, and where applicable all points should consider the different permutations of a temporary relocation of the market, (for 3-5 years), a permanent relocation, or the market remaining in its current location:

1. The impact on the vitality and viability of the town centre, from both a retailer and development/ investment perspective, if the current market were to remain in situ, or if it were to relocate from its existing position to the proposed position. This should include an assessment of the impact on the constituent parts of the town centre, including the area currently occupied by the market, the proposed location for the market and other parts of the town centre, including the Saddlers Shopping Centre and Park Street/The Bridge.
2. The impact of the relocation of the market on the St Matthew's Quarter if the proposed redevelopment materialises (as explained above) or if the proposed redevelopment does not proceed. A separate study has been recently commissioned into the Council exercising particular options that it has in the development agreement with Norton & Proffitt/St Modwen, and an analysis of the emerging findings of that study, also to be completed by the 11th September 2009, will be required.
3. The impact upon the market itself, if it were to remain in its current location, or if it were to move to the proposed location, and an analysis of the relative importance of the market to the overall vitality and viability of the town centre under each scenario. This should also include reference to the different permutations of the proposed redevelopment of the St Matthew's Quarter proceeding as outlined

above, in some other way, or not at all. Consultation on this matter would need to include a representative proportion of the market traders themselves and bodies such as the National Association of British Market Authorities.

4. The various scenarios for the future of the market need to include a consideration of what operational market management arrangements should be put in place to make the town centre and the market attractive to investment, and what steps should be taken to minimise any adverse impact upon retailers and shoppers.
5. The analysis should be based upon town centre health check indicators, such as yields, vacancy rates, rental levels, etc, as noted fully in Chapter 4 of PPS6: Planning for Town Centres, and annex A of the consultation draft of PPS4: Planning for Prosperous Economies.
6. The analysis should be shaped through “soft market testing” discussions with a cross-section of retailers/major landowners/agents/developers/investment institutions who currently operate in the town centre, and also a cross section of those who are not currently represented in the town centre. Discussions may also required with the emergency services and other bodies with an interest in the town centre (subject to agreement with the Council).

The above advice will need to be provided within certain parameters, including:

- Taking into consideration the current and predicted economic position to inform policy and actions now and in the future.
- Taking account of existing planning policy in the Walsall Unitary Development Plan, the West Midlands Regional Spatial Strategy Phase 1 Revision, the emerging West Midlands Regional Spatial Strategy Phase 2 Revision (Examination in Public, April – June 2009) and the emerging work on the Black Country Core Strategy. This should include reference to all supporting technical work, which will be provided on appointment to the successful consultancy team.
- Taking account of development proposals for Walsall town centre, those planned in competing town/city centres, and out-of-town locations.
- Reference to case study examples of similar market relocations which have impacted positively and negatively upon the vitality and viability of town centres.
- Taking into consideration previous work undertaken by market specialist consultancy Quarterbridge into the future of Walsall market, as well as financial and tenant management information. This background material will be provided to the successful consultancy, and must be treated confidentially and reported as such in a confidential appendix.
- Maintaining that discussions with all market traders are undertaken confidentially, and reported appropriately in a confidential appendix.
- Acting confidentially and recognising the sensitivities of this commission. Consultants should make sure that there are no conflicts of interests with other work being undertaken for neighbouring authorities or strategically within the region or sub-region.

- Recognising that Counsel's opinion will be sought on the robustness of the conclusions of the report before the next step is taken in submitting a planning application.

3. Consultancy submissions

It is anticipated that a mixture of consultancy expertise and disciplines, including valuation, planning, research and economic development skills, may be required to undertake this commission. Therefore, either one multi-disciplinary consultancy or a consortium of consultancies could undertake the commission.

Consultants are asked to submit a proposal which outlines the methodology that would be used to provide the advice required by the Council. This submission should be limited to 10 sides of A4 paper and should clearly include a fixed price fee for the proposal. The CVs of the staff proposed to undertake each stage of the commission, together with the time input of each team member, should be included as an appendix to the main 10 sided submission.

In evaluating submissions, the Council will consider the proposed methodology approach to undertaking the work, and the skills and experience of the proposed consultancy team. The fixed price fee proposed for undertaking both stages of the work will also be a determining factor, but the Council is not bound to accept the lowest fee proposal or any of the proposals submitted. It is not considered that an interview process will be required, though this position may have to be reconsidered when submissions are being evaluated.

In the event that a future planning application was challenged and further specialist advice was required, consultants are asked to provide a day-rate that they would charge if this materialised. This should be noted separately from the fee required to deliver this commission.

Consultants are asked to confirm in their submission that they can deliver a high quality piece of work that meets the tight timescale noted below and which will be robust in the event of further legal challenge. The consultants will need to state in writing their willingness to represent their conclusions through any planning appeals, examinations and/or legal proceedings.

4. Timescales

There is real political urgency to appoint consultants and complete this commission. Therefore, proposals must be submitted by 12 noon on the 10th August 2009 to the address below. The submissions will be evaluated quickly, and an appointment made by the end of the same week, with an inception meeting held on the 14th August 2009. The commission must be completed by the 14th September 2009.

As noted above, consultants are asked to confirm that they can meet the requirements of the brief to the appointed timescale.

5. Contact details

Proposals should be submitted to the name and address below, in an envelope marked private and confidential, or to the email address below. Any questions regarding the Council's requirements on this matter should be directed to the same place:

Paul Nicholson
Development Manager
Development and Delivery Service
Regeneration Directorate
Walsall Council
Civic Centre
Darwall Street
Walsall
WS1 1DG

Tel: 01922 652489

E-mail: nicholsonp@walsall.gov.uk

Appendix 2

Results of Walsall MBC Survey of Outdoor/Indoor Markets

Appendix 2 – Results of Walsall MBC Survey of Outdoor/ Indoor Markets Research (2009)

Lichfield Outdoor Market (Council-run)

Markets officer: Rachel Clive. Tel: 01543 309853

Market is held on:

Tuesday - stallholders erect their own stalls. Stalls vary in size. Fees start at £10.60 for 2.4m x 2.1m.

Friday - 8ft stalls erected by Council. £19.50.

Saturday - 8ft stalls erected by Council. £20.50.

1st Thursday of the month – Farmers Market. £20.50.

No plans for redevelopment. In 2007, electrical pop-ups were installed and the streets on which the market is situated were repaved. The trader toilet and kitchen block is due to be refurbished during winter 2009.

Trade is good, the market is full to capacity with 21 stalls on a Tuesday and 52-53 stalls on a Friday and Saturday.

Wolverhampton City Centre Outdoor Market (Council-run)

Markets Officer: Sue Handey. Tel: - 01902 555219

Market is held on:

Monday (bric-a-brac market)

Tuesday

Wednesday

Friday

Saturday

Occupancy rate is currently approximately 42% out of 63 stalls (please note that the Monday bric-a-brac market is not included in occupancy figures).

There are 20 spaces at the market at approximately 16% occupancy. These figures are considered to be good and are on par with last year's figures. The current economic climate has affected trade less on the outdoor market, and more on the indoor market.

There has recently been an improvement programme including the provision of a new landmark entrance, improvements to offer full access and also a new market office to assist customers. Consideration of further regeneration of the markets area is at the very preliminary stages.

The fee structure is as follows:

Licence

- Monday £12.50 (pre-owned goods) & £16.90 (new goods)

- Tuesday £27.25
- Wednesday £17.40
- Friday £27.25
- Saturday £27.25

Casual

- Monday £12.50 (pre-owned goods) & £16.90 (new goods)
- Tuesday £30.45
- Wednesday £20.60
- Friday £30.45
- Saturday £30.45

Car Parking

- Costs £18.50 including VAT per week for a designated space.

Store Rooms

- Costs from £9.90 to £49.45 dependent on size.

Wolverhampton Outdoor Market Incentive Packages 2009/10

In order to ensure that incentives packages are allocated in a fair and equitable manner, the following restrictions will apply:

A current licensed indoor/outdoor trader cannot terminate an existing stall licence and then re-apply for a stall which qualifies for an incentive package until a period of 26 weeks has elapsed between termination of their existing licence and re-allocation of the new licence.

- Casual trader converts to licensed stall, get 50% rent reduction for 4 weeks after 13 weeks on license.
- Existing License holder take on an additional stall gets 50% rent reduction for 13 weeks.
- Licensed trader introduces a friend who takes a stall for 13 weeks, get 10% rent reduction for 4 weeks.
- Any existing trader takes vacant stall on casual basis after 9.00 am, gets 50% rent reduction.

Bilston outdoor market (Council-run)

Markets Officer: Sue Handey. Tel: - 01902 555219
(Local office, tel: 01902 556080)

The market is held on:

- Monday (8.00am to 4.30pm)
- Thursday (8.00am to 4.00pm)
- Friday (8.00am to 5.00pm)
- Saturday (8.00am to 5.00pm)
- Sunday market operated by a private operator, Hughmark International

Occupancy rate is currently approximately 60% out of 117 stalls. There are 13 spaces at the market at approximately 32% occupancy

These figures are considered to be good and are on par with last year's figures.

The fee structure is as follows:

Licence (middle/corner)

- Monday: £12.75 / £21.30
- Thursday: £25.20 / £28.90
- Friday: £12.75 / £21.30
- Saturday: £26.90 / £32.65

Casual (middle/corner)

- Monday: £15.90 / £24.50
- Thursday: £28.35/ £32.10
- Friday: £15.90 / £24.50
- Saturday: £30.00/ £35.85

Patio (licence/casual)

- Monday: £21.30/ £24.50
- Thursday: £31.25/ £34.45
- Friday: £21.30/ £24.50
- Saturday: £31.25/ £34.45

Demonstration Area/Space

- Monday: £16.15
- Thursday: £28.45
- Friday: £16.15
- Saturday: £30.30

Store rooms

- £28.85 to £42.80 per week

Car parking

- Weekly: £9.80 (inc. VAT)
- Daily: £4.25 (inc. VAT)

Bilston Outdoor Market Incentive Packages 2009/10

In order to ensure that incentives packages are allocated in a fair and equitable manner, the following restrictions will apply:

A current licensed indoor/outdoor trader cannot terminate an existing stall licence and then re-apply for a stall which qualifies for an incentive package until a period of 26 weeks has elapsed between termination of their existing licence and re-allocation of the new licence

- Casual trader converts to licensed stall, get 50% rent reduction for 4 weeks after 13 weeks on license.

- Existing License holder take on an additional stall gets 50% rent reduction for 13 weeks.
- Licensed trader introduces a friend who takes a stall for 13 weeks, get 10% rent reduction for 4 weeks.
- Any existing trader takes vacant stall on casual basis after 9.00 am, gets 50% rent reduction.

West Bromwich outdoor market (Council-run)

Deputy Market Manager: Andy Bucknell. Tel: 0121 5533074

The market is held on:

Monday (Bric-a-Brac)	9.00am - 5.00pm
Tuesday	9.00am - 5.00pm
Wednesday	9.00am - 5.00pm
Thursday	9.00am - 5.00pm
Friday	9.00am - 5.00pm
Saturday	9.00am - 5.00pm

Occupancy figures are to be provided at a later date. There is a maximum occupancy level of 76 stalls.

The current trading situation is described as difficult and occupancy levels of the market are slowly declining, which is also a year-on-year trend.

The fee schedule is as follows:

Daily fee inc. car parking fee of £1.60

Casual traders:	Monday	£14.80
	Tuesday	£21.05
	Wednesday	£22.60
	Thursday	£21.05
	Friday	£22.60
	Saturday	£31.25

Regular Traders:	Monday	£14.40
	Tuesday	£20.45
	Wednesday	£21.95
	Thursday	£20.45
	Friday	£21.95
	Saturday	£30.35

Consultants are currently working on a report to suggest future options/improvements to the market, but the information is not yet in the public domain and is at the tentative stages.

Wednesbury outdoor market (Council-run)

Deputy Market Manager: Andy Bucknell. Tel: 0121 5533074

The market is held on:

Tuesday	9.30am - 1pm
Friday	9.00am - 5.00pm
Saturday	9.00am - 5.00pm

Occupancy figures are to be provided at a later date. There is a maximum occupancy level of 70 stalls.

The current trading situation is described as difficult and occupancy levels of the market are slowly declining, which is also a year-on-year trend.

The fee schedule is as follows:

Standard 8ft pitch:	Tuesday	£11.75
	Fri & Sat	£5
Standard 12ft pitch:	Tuesday	£17.60
	Fri & Sat	£5

Consultants are currently working on a report to suggest future options/improvements to the market, but the information is not yet in the public domain and is at the tentative stages.

Worcester Outdoor Market (known as Crown Gate Market. Privately operated by Bray Associates)

Market Manager – Chris. Tel: 07811 624391.
Bray Associates, Tel: 01895 639912. Ask for Bryan Nunam.

The market is held from Monday to Saturday from 8.30am – 4.30pm.

There are 44 stalls, reasonably well occupied at the moment. Trade is down due to the economic climate. Trade is particularly quiet on Monday and Thursday.

Fees are as follows:

Monday to Friday:	£20 for 1 stall
	£30 for 2 stalls
Saturday:	£25 for 1 stall

Chesterfield Outdoor Market (Council-run)

Andy Bond: 01246 345991

The market is held on Monday, Friday and Saturday.

There are 240 stalls, averaging 61-65% occupancy. This is stable and consistent with the last 3-4 years.

5 years ago, £330,000 was spent replacing all of the stalls with new ones. There are no further plans for improvements or redevelopment at this stage.

The fee schedule is as follows:

MONDAY & FRIDAY	RENT	LIGHT	TOTAL
12' TOP & BOTTOM ROW	16.90	1.10	18.00
10' TOP & BOTTOM ROW	15.90	1.10	17.00
8' TOP & BOTTOM ROW	14.80	1.10	15.90
12' END ROW & CENTRE AISLE	14.80	1.10	15.90
8' END ROW & CENTRE AISLE	11.60	1.10	12.70
12' INSIDE	10.60	1.10	11.70
8' INSIDE	7.40	1.10	8.50

THURSDAY			
12' TOP & BOTTOM ROW	24.30	1.10	25.40
10' TOP & BOTTOM ROW	22.00	1.10	23.10
8' TOP & BOTTOM ROW	19.30	1.10	20.40
12' END ROW	24.10	1.10	25.20
8' END ROW	19.20	1.10	20.30
12' CENTRE AISLE (Main Sq. only)	22.00	1.10	23.10
8' CENTRE AISLE (Main Sq. only)	17.90	1.10	19.00
12' INSIDE	18.60	1.10	19.70
8' INSIDE	14.10	1.10	15.20

SATURDAY			
12' TOP & BOTTOM ROW	27.00	1.10	28.10
10' TOP & BOTTOM ROW	23.20	1.10	24.30
8' TOP & BOTTOM ROW	19.20	1.10	20.30
12' END ROW	26.90	1.10	28.00
8' END ROW	18.90	1.10	20.00
12' CENTRE AISLE (Main Sq. only)	22.30	1.10	23.40
8' CENTRE AISLE (Main Sq. only)	16.40	1.10	17.50
12' INSIDE	17.90	1.10	19.00
8' INSIDE	12.70	1.10	13.80

PLUS 20p Promotional Levy per trader.

OTHER PITCHES	MON/FRI	THURS	SAT
8' Central Pavement (+ 20p PR)	31.80	31.80	42.00
16' Central Pavement (+ 20p PR)	47.20	47.20	62.50
BURLINGTON STREET (inc. PR)	20.00 + 1.10	20.00 +1.10	25.00 +1.10
DIRECT SALES PITCH (inc. PR)	20.30	20.20	29.80
DEMO PITCH (inc. PR)	12.90	13.80	13.80
ARENA/PORTLAND SITE (inc PR)	41.00	41.00	51.20
FAIRGROUND RIDE (inc. PR)	26.40	26.40	26.40
ICE CREAM (inc. PR)	20.00	20.00	20.00
CATERING UNIT M. SQ. (inc. PR)	33.00+1.10	33.00+1.10	33.00+1.10
CATERING UNIT N. SQ. (inc. PR)	33.00+1.10	33.00+1.10	33.00+1.10
STORAGE	10.80 PER	WEEK	
FARMERS' MARKET	18.80		
CAR BOOT	9.00		

Chester Indoor Market (Council-run)

Assistant Market Manager: Andy Noller. Tel: 01244 402340.

The market is held from Monday to Saturday.

The fee schedule is as follows:

Daily stalls in the middle of market (all casual licence): £5.10, 9ft frontage.
 B-units (landlord and tenant agreements): £60 per wk, 12ft x 12ft.
 Shop units (landlord and tenant agreements): £130 - £200 per wk.

In 2008, plans for comprehensive redevelopment of the market area including relocation fell through due to the difficult economic climate. It is hoped that these plans resume in the near future. Chester is a historic town which adds to the complexity of such relocation and redevelopment plans.

Trade is currently struggling and occupation of the market is in decline, continuing the trend of the past 3 - 4 years. Of 30 shop units, approximately 5 are empty. Of 60 B-units, 7 are empty and of 60 daily stalls, 15 are empty.

Wakefield Outdoor Market (Council-run)

Market Manager: Aaron Swift. Tel: 01924 305908.

The market is held on:

Monday	0830 - 1600
Tuesday	0830 – 1600
Thursday (Global Market)	0830 - 1600
Friday	0830 - 1600
Saturday	0830 – 1600

There are 45 stalls which are nearly at full capacity on all of the days except for Monday which is the weakest day.

The stalls cost a set fee of £11.50 per day.

There has been a lot of recent regeneration surrounding the markets. In 2008, the original market hall was demolished and a new one constructed which now fully houses the indoor market and services the outdoor market. Wakefield town centre is currently subject to a major regeneration initiative that, when completed, will have the market at the centre.

Warrington Market (Council-run indoor market)

Market Manager: Steven Pickering. Tel: 01925 632571.

The market is held from Monday to Saturday, 9 – 5pm.

There are 250 stalls in the indoor market, currently at approximately 75% occupancy. This is slightly less than in previous years and is related to the current economic climate.

Fees for the stalls are exceptionally variable, therefore the Markets Manager was unable to provide figures.

There has been no recent regeneration of the market or surrounding area, nor are there any future plans for regeneration at this time.

Appendix 3

Responses from Stakeholder Engagement

Appendix 3 – Responses from Stakeholder Engagement

Urban Splash	<p>Hi Paul</p> <p>Thanks for the note and information.</p> <p>Having thought this through I just don't think that it's close enough to our interests in Walsall to warrant Urban Splash to make a comment.</p> <p>I'm sorry I cant be of more help</p> <p>Hope all is good with you</p> <p>Nathan Cornish</p>
CBRE on behalf of BBC Pension Trust Ltd and National Australia Group	<p>Paul</p> <p>Thank you for sending this proposal over to me. I have now had a chance to review, my only concern is conserving the sight lines, so I would be interested in seeing how the Council are going to get round this issue when further plans materialise.</p> <p>Kind Regards,</p> <p>Alexandra Mills</p> <hr/> <p>Sorry Paul but I understand that Alix has already responded saying all OK with us.</p> <p>Regards</p> <p>Richard Everett - Senior Director</p>
DTZ, on behalf of Threadneedle Properties	<p>Paul,</p> <p>Thank you for your note.</p> <p>My client is satisfied with the level of consultation being conducted by the Council as part of it latest proposals for a temporary relocation of the market; and is pleased that the level of engagement has increased.</p> <p>It has entered into a dialogue with the council setting out various conditions upon which, if satisfied, it will give its support to the relocation. Good progress is being made in those discussions and it is envisaged that the parties will enter into some form of binding agreement which will legally establish those conditions.</p> <p>Kind Regards,</p> <p>John Percy</p>
Asda	<p>Hello Paul</p> <p>Further to your e-mail and Walsall Market relocation proposals attached. I can confirm that the business are concerned to find that the market stalls will be relocating further away from the High Street/George Street area and nearer to Park Street/The Bridge areas, therefore the footfall that is attracted by the market stalls will be dispersed towards The Bridge and Park Street areas. As you will be aware the High Street/George Street area of the town centre are in need of regeneration, in order to encourage further retailers to take space in this area footfall needs to be encouraged. By relocating the stalls away from this area there will be a reduction in footfall which may lead to retail units remaining empty for sometime and certainly not assist the regeneration of the area.</p> <p>I trust you will take these comments into consideration, if you have any queries please do not hesitate to contact me.</p> <p>Regards Gillian</p>

<p>London Cambridge Properties (LCP)</p>	<p>Hi Paul, Without Prejudice</p> <p>Thanks for your note, on which I would make the following comments;</p> <ol style="list-style-type: none"> 1. I had understood when this proposal was first made that it was to be a temporary arrangement during the re-development of the St. Matthews Quarter, following which the market would be returned to that area. This seems to have become an option, with the possibility of it remaining as now proposed if it suits the developers or local authority purposes later on. The proposal to facilitate redevelopment temporarily is acceptable but permanent partial relocation of the market into Park Street would not be beneficial to that area. 2. I would not in any circumstances support the location of proposed food concession van in Park Street. 3. Whilst Park Place is unlikely to be affected detrimentally by these proposals I do feel that that planning the future of Walsall Town Centre should be carefully considered by reference to scale, existing townscape and economic projections, i.e. replacement not displacement development and although this appears to be only a small step I fear that it may be in the wrong direction. <p>Regards, Steve Carlin</p>
<p>Invista</p>	<p>MAIN CONCERNS</p> <p>TEMPORARY NATURE OF THE MARKET – as mentioned in GVA’s letter – “whilst the proposed regeneration scheme is currently being reassessed due to the economic climate”. This is very grey and the temporary market could go on for more than three years and significantly ‘downgrade’ Park Street’s current trading environment. What are the councils proposals should the expected regeneration fail to materialise?</p> <p>DISCIPLINE OVER THE MARKET- The key to this working in the short term is the discipline over the market traders and how quickly the ‘NEW MANAGEMENT CODE’ can be enforced.</p> <p>All of the retailers in the area need to be able to measure how closely the traders stick to the Management Code – and I would suggest that there is some feedback to all concerned otherwise – the town may be left with a lot of disgruntled retailers (who may even pull out if they are dissatisfied).</p> <p>In addition – we need to know that a ‘balanced view will be taken over any conflict in trade issues – as the last thing anyone needs in this climate is a market stall outside their front door, undermining retail prices (same goods)</p> <p>MARKET STANDS</p> <p>“Rejuvenated stalls remain in situ” - what happens if they are not being used – as there will be nothing worse than an empty stand.</p> <p>Please send form of text before published</p> <p>Joseph Wall Invista Real Estate</p>

In addition the following letter was received from St. Modwen's:



Our ref: MW/rjk/089/SMQ

17th September 2009

Paul Brewer
Grimleys
3 Brindleyplace
Birmingham
B1 2JB

Dear Paul

Re: Walsall Market Relocation Proposals

Thank you for your letter and attachments outlining the proposals to move the market at Walsall

On behalf of the Norton and Proffitt JV I comment as follows -

Background

It is useful to set the context for our comments with a short background of the St Matthews Quarter.

Norton and Proffitt have owned the St Matthews Quarter since December 2000 and completed the first phase comprising the Asda store, multi storey car park and residential block on George Street in 2007. We had started on-site with the second phase, comprising 50 apartments, 45,000 sq ft of offices and 10,000 sq ft of retail when a fire demolished the mill in 2007.

The clearance of the site led to a rethink and early in 2008 Norton and Proffitt, together with the Council, prepared a brief for the development of the site and selected Leslie Jones as architects for a new retail scheme which included a new, permanent home for the market.

Unfortunately the property market, and specifically retailer demand, collapsed shortly thereafter and Norton and Proffitt sought to rationalise the proposed scheme limiting the retail to known retailer requirements and positioning it along the Digbeth frontage with leisure uses behind. This scheme was presented to the council and to Primark as a potential anchor tenant and was well received. In parallel Norton and Proffitt sought to extend the development agreement with the council and suggested a 50/50 Joint Venture to run the market in St Matthews Quarter, this principle was agreed by the Council's cabinet.

The Council was keen to relocate the market to the Bridge in 2008, Norton and Proffitt expressed concern that the move should take place only when required to facilitate the development of the St Matthews Quarter/ Old Square end of town. The move of the market was halted due to objections from other landowners in the town.

St. Modwen Properties PLC

Head Office & Registered Office: Sir Stanley Clarke House, 7 Ridgeway, Quinton Business Park, Birmingham, B32 1AF

t: [0121] 222 9400 w: stmodwen.co.uk

\\bham_dcoz\Birmingham Regional\Secretaries\Rupel\2009\MW\SMQ\Letters\to Paul Brewer\170909

Norton and Proffitt have continued negotiations with Primark but it has become clear that Primark are considering 3 options in Walsall. Norton and Proffitt have issued a highly incentivised offer to Primark and are currently waiting for a response.

Political changes at the Council have led to changes in the Council's stance. The decision to operate the market as a JV with Norton and Proffitt was rescinded and the Council are revisiting plans to relocate the market to the Bridge. This has led to uncertainty over the future plans for the permanent market. As a result we are no longer including a Market Area within our proposals.

Given the recent dramatic changes in the retail property market there is now limited demand for space nationally and particularly in towns with similar catchments and demographic profiles to Walsall. The negotiating strength is currently with the retailers and developers have to prove deliverability and provide highly incentivised deals to capture the strong retailers. St Matthews Quarter is no different and Norton and Proffitt have sought to simplify the scheme in an attempt to secure the strongest tenant mix and create a financially viable development. If we are able to attract retailers to St Matthews Quarter we will need to be able to provide them with a clear vision for the future of St Matthews Quarter which will include how the market is dealt with.

Current Tenants at St Matthews Quarter

Norton and Proffitt have continued to manage the estate as a development site and have maintained short tenancies where possible so that vacant possession can be obtained relatively easily when required. We have acquired further land at 42/44 High Street to allow for a stronger frontage onto Digbeth/ High St. The existing buildings are in a very poor state of repair and this together with the short unprotected tenancies on offer have meant that it has proven very difficult to let the vacant space. Additionally the existing tenants are increasingly exercising breaks in their leases and seeking rent concessions. Continuing uncertainty over the future of the site and the future of the market are having a direct impact on the strength of the site as a trading location and the ability to maintain occupancy. The current tenants rely on the market in the current location to draw customers to this end of town.

Asda who occupy phase 1 of the development have stated that they are keen to see the development of the old mill site and a strengthening of this end of town to ensure that their store is links effectively to the rest of the town centre retail as their offer is designed as a town centre site and not a fringe/ out of town store. Asda have said that the store's future success depends on the strength of the linkages to the rest of the town centre retail offer.

The Market Offer in Walsall

We believe that a strong market in Walsall will help to differentiate the town from competing centres and help arrest shopper leakage to other towns. The current market suffers from old stalls and equipment and an unfocused tenant mix. Additionally when the market is not trading the unused stalls create an unfriendly shopping environment. We believe that a strong market with creative, firm management can become a destination and footfall generator in the town. If the market continues as it is we fear that it will struggle to maintain occupancy and therefore detract from the retail offer in the town.

We believe the location and the health of the market are linked. A market that is trading poorly will be drawn to the highest footfall location in the town to survive whereas a market with a confident approach and clearly defined offer that matches consumer requirements could act as a vibrant draw to new and existing customers to the town and broaden the retail offer in Walsall.

We have a concern that by moving the market to the Bridge it will isolate the Old Square and St Matthews area of the town by creating a barrier to footfall and decreasing visibility from Park Street/ The Bridge. This issue could be accepted if it is clearly a temporary move to facilitate the enhancement of Old Square/St Matthews but if it is, or is perceived as, a permanent move we

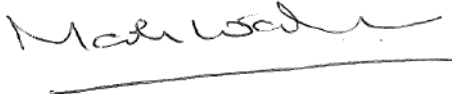
believe it will severely detract from Old Square/ St Matthews as a retailing location and therefore adversely affect values.

We welcome the agreement of a new management code for the market and would like to see a copy of the new code. However we believe this must be managed firmly maintaining sight lines to all frontages and the fabric of the stalls so that the market does not detract from the shopping offer during its trading or when it is closed. The current market stalls create a very poor image in Digbeth when not trading and we believe alternatives to leaving the stalls in-situ should be investigated to ensure the market enhances and does not detract from the town. We believe that best practice both nationally and internationally for market management should be sought out and the lessons learned applied to Walsall.

In short we support the temporary move of the market as long as it is clear to all parties that it is temporary and, subject to seeing the new management code, it is properly run so as to complement, not compete with, the existing retail offer.

Kind regards.

Yours sincerely

A handwritten signature in black ink, appearing to read 'Mark Watkins', is written over a horizontal line.

Mark Watkins

E-mail: mwatkins@stmodwen.co.uk

Secretary: rjagpal@stmodwen.co.uk

c.c: Dominic Goold, Goold Estates

Copy of the letter sent (via email) to the key stakeholders:

From: Brewer, Paul [mailto:Paul.Brewer@gvagrimley.co.uk]
Sent: 09 September 2009 17:46
To: Nathan Cornish
Subject: FW: Relocation of Walsall Market

9th September, 2009
WITHOUT PREJUDICE

Dear Nathan

WALSALL MARKET RELOCATION PROPOSALS

I write following our recent telephone conversation to formally advise you that on behalf of Walsall Council, we are undertaking a consultations to ascertain the views and comments of key stakeholders / interested parties in the Town (of which Urban Splash are one), to their proposal to temporarily relocate the Walsall Markets.

As you are aware, the Market is currently located in Digbeth , High Street and Lower Hall Lane close to Old Square Shopping centre and The Victoria Arcade. Part of this area is the subject of regeneration proposals being promoted by Norton & Proffitt and St Modwens to include for a mixed use retail and leisure development to be known as the St Matthews Quarter .

Whilst the proposed regeneration scheme is currently being reassessed due to the economic climate, both Walsall Council and the Market Traders Association have agreed that ideally they would like to reconfigure the Market layout in order to attract more pedestrian footfall.

This reconfiguration entails the stalls being dispersed from Digbeth and Lower Hall Lane to create a "star shape" by locating stalls along Bridge Street, Bradford Street and the north side of Park Street upto No.s 30 - just before the Park Street Arcade. (as per the attached plan).

Although some stalls will remain in Digbeth (coloured green), the majority of them will extend out to the new locations (hatched purple) on the attached plan.

The Council have the wish to obtain planning consent and instigate the move prior to Christmas 2009 such that the Market Traders could get the benefit of the Christmas trade.

The move would be for an initial period of 3 years as it is currently within Norton & Proffitts and St Modwens scheme proposals to provide a new Market Area as part of the mixed use scheme for the St Matthews Quarter when the development is finally undertaken.

In tandem with these proposals to relocate the Market, Walsall Council and The Market Traders Association have agreed a new Management Code for all the stallholders which will more strictly control servicing and operational matters as well as the stalls are to be refitted with new and modern coverings – all of which will make them a more attractive addition to the retail offer of Walsall Town Centre.

It is intended that the market could operate 6 days a week subject to potential demand (currently 5 days) and that the rejuvenated stalls will remain "in - situ" . However the Council will be siting the stalls to ensure that they preserve sight - lines through to all the frontages of the retail units that are located behind. .

Your views and comments regarding these suggestions are invited so that we can advise our clients of these consultations as part of our overall study. We are under strict time constraints from the Council to submit our report and therefore I would be very grateful to receive your response before Friday 18th September if possible.

Please feel free to give me a call to discuss.

Yours sincerely

Paul D C Brewer
Retail Director

Paul Brewer, Retail Director, GVA Grimley Ltd
Direct Dial: 0121 609 8431 Mobile: 07831 820 616 - E-Mail:
paul.brewer@gvagrimley.co.uk
Web: <http://www.gvagrimley.co.uk> - National Number: 08449 02 03 04 - Fax:
0121 609 8314