APPENDIX 1

BRIEF SUMMARY OF THE INFORMATION FROM CONSULTANTS' STUDIES TO INFORM WALSALL'S UDP REVIEW

Shoppers Survey - Donaldsons, 1997

A1.1 This was based upon street interviews in the town and district centres and provides information on a range of issues, including:

- The centres' catchment areas;
- Modes of travel to centres, access to a car, and travel times;
- Purposes of visits to the centres;
- Likes and dislikes about centres, and improvements desired.

Town and District Centre Healthchecks - Healey & Baker, 2000

A1.2 Healey & Baker were commissioned to provide a market view of the economic health and investment prospects of Walsall town centre and the district centres of Aldridge, Bloxwich, Brownhills and Willenhall (Darlaston was the subject of a separate exercise, relating to efforts to secure a new anchor store). The consultants concluded that all of the Borough's centres are weaker than would be wished and:

- It should be accepted the comparison shopping role of the district centres will continue to decline, but the Council should encourage a range of uses to contribute to their viability and support identified development opportunities;
- Walsall town centre does have the potential to attract investment and this should be maximised to prevent it going elsewhere - with a need to manage and support development; and
- Further out of centre development should be resisted.

A1.3 The consultants also proposed measures to support the Borough's centres:

1. Support town centre management and extend it to all the Borough's centres;
2. Reduce the impact of traffic, with highway improvement and management measures, especially in certain centres;
3. Enhance car parking for shoppers and visitors;
4. Improve town centre environments and security;
5. Encourage a diversity of uses, including services and leisure;
6. Encourage housing close to centres; and
7. Attract high spending households.

A1.4 The Council's Planning and Town and District Centres Committee considered a detailed report on the consultants study and - with a number of refinements - agreed that its analysis should be supported.

Household Survey, Retail Capacity Study and Study of Factory Outlet Centre Proposals - Roger Tym & Partners, 2001

A1.5 The household survey covered a wide area extending beyond the Borough boundaries and provided information which included:

- Patterns of food and grocery shopping, including linked trips and modes of travel;
- Patterns of comparison shopping - for clothes and shoes, furniture / carpets / DIY / white goods, and specialist items - again with reference to linked trips and modes of travel;
- Patterns of leisure visits - to cinemas, restaurants, pubs / bars, theatres, concert halls and other facilities; and
- Use of the Borough's town and district centres.

A1.6 The household survey results were used as a basis to assess the performances of retail centres and developments in the area. Spending patterns were then projected forward and account taken of future claims on expenditure growth to arrive at the consumer expenditure capacity to support future retail development. Under the 2 most favourable scenarios (assuming that committed and proposed developments in the Borough's centres would be successful):

- There would be a significant deficit in comparison expenditure up to 2006, which may be offset by subsequent expenditure growth, to provide the capacity for about 4,740 sq.m. net up to 2011, provided town centre schemes were successful in increasing Walsall's market share.
- For convenience retailing, there would be a deficit in expenditure (equivalent to 2,695 sq.m. sales) right through the UDP Review, so that committed developments would have an impact on existing retailers

Roger Tym and Partners concluded that:

1. Generally, all new retail and leisure development should be of an appropriate scale for the centre where it is located, and that the UDP hierarchy is the most sustainable framework for meeting the Borough's needs.
2. The Borough's centres have more than enough vacant and under-used land to meet all needs for town centre uses and there is a pressing need to regenerate these centres and to strengthen and diversify the Borough's smaller centres.
3. In terms of comparison shopping, the Town Wharf Phase 2 and Digbeth developments in Walsall town centre should be vigorously supported. As these would have to be successful for an increased market share to be achieved, there is no need to plan proactively for further comparison developments and out-of-centre development should be resisted strongly.
4. For convenience shopping, the first priority is to secure a new anchor foodstore for Darlaston, after this there is a need to improve the

market share of Willenhall, and then encouragement should be given to extending existing anchor stores elsewhere. Beyond commitments, there is no quantitative case for any new large foodstore and out-of-centre proposals should be resisted strongly. Local needs should be met through convenience stores primarily in local centres, although there should be a policy to meet particular local needs which arise outside of centres.

5. For leisure uses, Walsall town centre is considered the best location in planning terms for a multiplex cinema, whilst proposals elsewhere should be resisted. Generally, the opportunities identified in the town and district centres offer the best prospects for leisure investment to serve the community and increase participation rates - and, again, out-of-centre proposals should be resisted. Encouragement should be given to restaurants and bars within centres to add diversity. Finally, the Council was recommended to pursue the development of a theatre / concert hall in Walsall town centre.

A1.7 The consultants also advised on competing factory outlet centres in Walsall and at Brownhills and Burntwood. They recommended that the proposal for Walsall town centre should be supported, whilst the other 2 schemes should be resisted. Since that advice the development in Walsall, ‘Shannon’s Mill’, has been given planning permission, whilst the application at Brownhills was withdrawn and that at Burntwood was refused by the Deputy Prime Minister.

A1.8 The Roger Tym & Partners study was completed in tandem with work on the First Draft for Deposit of the Review and the consultants’ work was incorporated into the Plan.

A1.9 These studies - together with a study by Deloitte Touche, which cast light on trends in commercial leisure, and the results of the Council’s annual floorspace surveys of the town and district centres - are described more fully in the Retail and Centres Background Paper prepared with the First Deposit Draft Plan. For the fullest information, reference should be made to the consultants’ studies themselves.