Lichfield district council

# UPDATE OF RETAIL EVIDENCE BASE, 2011

England & Lyle

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Figure 1 – Lichfield City Centre

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**EXECUTIVE SUMMARY**

1. This report updates previous reports prepared for the District Council by England & Lyle on Evidence on Retail Matters for the LDF Core Strategy.

2. Section 2 summarises the PPS4 policies relating to main town centre uses at the local level. Advice is given on how these PPS4 policies should be applied in Lichfield in relation to meeting future needs, identifying sites, the sequential approach, assessing impact and other requirements. Reference is made to the draft National Planning Policy Framework.

**Future Shopping Needs**

3. The previous assessment of quantitative need carried out by England & Lyle in April 2010 has been updated, taking account of the latest national expenditure growth forecasts. The LDF forecast period has been extended from 2026 to 2028. Estimates have been made of the potential for increases in retention levels of expenditure in the Lichfield and Burntwood catchment areas. An allowance has been made for recent developments and commitments.

4. In convenience goods there is no capacity for additional development in Lichfield or Burntwood throughout the period up to 2028, after allowing for recent developments and commitments. However, the capacity analysis does not take account of the increase in retention levels that would occur as a result of new convenience goods retail developments, notably the potential for a new supermarket development in Burntwood.

5. In comparison goods there is a negative capacity for additional development in Lichfield up to 2021 because the available capacity is taken up by the commitment for the Friarsgate redevelopment scheme. However, there is a significant surplus capacity in 2028 to support further comparison goods development in Lichfield. In Burntwood there is a negative capacity for additional development in 2016 because of the commitment for the LCP scheme on the Hoardings site. There is a small capacity for additional comparison goods development in Burntwood in 2021 and a moderate capacity for further comparison goods shopping in 2028.

6. There is a small capacity for additional bulky goods development in the Lichfield catchment area from 2016 onwards. Some of this bulky goods capacity could be met in Burntwood as well as in Lichfield.

7. In Lichfield an appropriate floorspace limit should include the committed Friarsgate redevelopment scheme with a floorspace of 22,000 sq.m. gross, other recent developments and commitments, and the additional floorspace capacity we have identified which could be accommodated on sites within the city centre. The total

amount of floorspace that could be supported in Lichfield up to 2028, including recent developments and commitments, is 41,000 sq.m. gross of which 36,000 sq.m. gross is in comparison goods.

8. This floorspace limit includes the replacement Tesco store on the edge of the city centre and the recently developed out-of-centre Lidl supermarket and Lichfield Retail Park on Eastern Avenue.

9. Some of the additional floorspace capacity is in bulky goods (up to 5,000 sq.m. gross) which would have to be accommodated outside the city centre. Therefore we suggest that the LDF Core Strategy should refer to a floorspace limit of 36,000 sq.m. gross to meet city centre shopping needs, of which 31,000 sq.m. gross is for comparison goods.

10. The proposed limit allows for an additional 11,000 sq.m. gross of retail floorspace (including bulky goods) over and above that committed at Friarsgate in the LDF period to 2028, and of this total the LDF should seek to accommodate 6,000 sq.m. gross in the city centre.

11. An appropriate floorspace limit for Burntwood should include the committed LCP scheme which has gross floorspace of about 9,000 sq.m., Morrisons' extension, the approved Aldi store and the additional floorspace capacity we have identified which could be accommodated in the town centre. The total floorspace capacity is about 14,000 sq.m. gross, excluding any potential for a larger foodstore in Burntwood which has not been assessed in this study. We would suggest that the LDF Core Strategy refers to a floorspace limit of 14,000 sq.m. gross, including both convenience and comparison goods, which includes the LCP Hoardings site. Of this total, 13,000 sq.m. gross is in comparison goods but it does not take account of the potential for some of the floorspace capacity for bulky goods in the Lichfield catchment area to be accommodated in Burntwood.

**Lichfield City Centre**

12. The health checks of Lichfield city centre and Burntwood town centre have been updated in October 2011. The overall vitality and viability index obtained on the health check appraisal for Lichfield is 3.8 which is a relatively high level of vitality and viability. The vitality and viability index increased from 3.6 in March 2007 to 3.7 in February 2009 and has increased again to 3.8 in October 2011. The vitality and viability of the centre is strong and it will improve even further when the Friarsgate redevelopment scheme takes place in the next few years.

13. Most of the identified need for improved shopping in Lichfield will be met be the Friarsgate scheme. However, there are other potential opportunities for further retail development in Lichfield city centre. The sites that offer the best potential for further

retail development in the long term are the Bird Street car park site and the Backcester Lane area. Our advice is that these sites should be allocated for future retail development in the LDF.

**Burntwood Town Centre**

14. The overall vitality and viability index obtained on the health check appraisal for Burntwood is 3.2 which is just above average. The vitality and viability index increased from 3.2 in March 2007 to 3.3 in February 2009 but it has decreased again to 3.2 in the last two years because of the increase in the vacancy rate and vacant floorspace. Burntwood is a centre in need of improvement. It needs to have an improved retail offer and a consolidation of its retail provision to increase the critical mass of shopping in the centre. There is a qualitative as well as a quantitative need for further retail development in Burntwood.

15. There are several sites in Burntwood that could accommodate further retail development on the edge of the town centre – the Hoardings site west of Morrisons which has planning consent for retail development by LCP; the former Bridge Cross Garage site, Cannock Road; the Olaf Johnson site to the west of Tesco; and the Bridge Cross Working Mens Club site, which has planning consent for an Aldi store.

16. We have identified a potential floorspace capacity of up to 3,000 sq.m. gross, in addition to the LCP scheme, the recent Morrisons extension and the Aldi store. This capacity could be accommodated on the Olaf Johnson site (including the adjacent former garage site). The scale of development that could be accommodated on the Hoardings site and the Olaf Johnson site is appropriate to the role and function of Burntwood town centre within the hierarchy and its catchment.

17. We would advise the Council that the Hoardings site, the Olaf Johnson site and the Bridge Cross Garage site, and the Aldi development site should all be regarded as development opportunities in the LDF.

**Impact Assessments**

18. Section 6 includes impact assessments of new retail developments in Lichfield and an enlarged town centre at Burntwood.

19. The assessment of the Friarsgate scheme in Lichfield for comparison goods in 2016 shows predicted trade diversions of 8% from Lichfield city centre and 4% from Burntwood town centre. In the context of the strong vitality and viability of Lichfield city centre, the level of impact on the centre is not significant.

20. The cumulative impact of the Friarsgate scheme together with the potential for further retail development in Lichfield city centre in the longer term has been assessed

for comparison goods in 2028. The cumulative impacts in comparison goods are 9% from Lichfield city centre (excluding the Friarsgate scheme) and 5% from Burntwood town centre. There would not be a significant adverse impact on these centres. Longer term development opportunities on the Bird Street car park and Backcester Lane sites will help to maintain the attraction of the city centre through the LDF period. The Friarsgate scheme and other development opportunities would not have an unacceptable impact on any centres in the catchment area, in terms of PPS4 Policy EC5.

21. The assessment of the LCP scheme on the Hoardings site in Burntwood for comparison goods in 2016 shows predicted trade diversions of 3% from Lichfield city centre and 2% from Burntwood town centre. The overall trade diversion in the catchment area is 3%. These are not significant levels of impact in comparison goods. Any initial trade losses will not be significant and there will be spin-off benefits for existing traders in Burntwood. In any event the strength of Burntwood at present is in its convenience goods shopping and that role will continue.

22. The impact of a potential initial redevelopment of the Olaf Johnson site has been assessed in 2016 assuming that the first phase of development on the site would be in the form of a superstore. The assessment is for convenience and comparison goods combined. The predicted trade diversions are 11% from Burntwood town centre (principally Morrisons) and 3% from Lichfield city centre. The overall trade diversion in the catchment area is 4%. These are not significant levels of impact.

23. An assessment has been made of the potential longer term redevelopment of the Olaf Johnson site for convenience and comparison goods retail development in 2028. The predicted impacts are 5% from Burntwood town centre and 3% from Lichfield city centre. The overall trade diversion in the catchment area is 3%. There would not be a significant adverse impact on any centres in the catchment area.

24. We have also assessed the cumulative trading impact of the LCP scheme together with the longer term option of further retail development on the Olaf Johnson site based on total turnover (comparison and convenience goods) in 2028. The cumulative impacts are 6% in Burntwood town centre and 5% in Lichfield city centre, with an overall trade diversion in the catchment area of 4%. In PPS4 terms there would not be a significant adverse impact on any centres in the catchment area. The LCP scheme and the potential development on the Olaf Johnson site would not have an unacceptable impact on centres within the catchment area.

25. The cumulative impact assessment shows predicted impacts on Walsall and Cannock town centres of around 4% of total turnover. There is no requirement in PPS4 to assess the impact on centres outside the catchment area but for robustness we have examined the likely impacts on Cannock and Walsall. It is clear from our assessments that there will be no significant impacts on Cannock and Walsall town centres.

**Application of other PPS4 Policy Advice**

26. Section 7 considers the most appropriate boundaries of centres and primary shopping areas in Lichfield and Burntwood. The proposed boundaries are shown on the maps in Figures 1 and 2.

27. PPS4 states that the Council should consider setting floorspace thresholds for the scale of retail development outside centres (ie. edge-of-centre and out-of-centre locations) which should be subject to an impact assessment. We recommend that the following thresholds are used by the Council in deciding whether a proposed development requires an impact assessment.

| | Assessment Required | Assessment may be Required |
|---|---|---|
| Lichfield | over 1,000 sq. metres gross | below 1,000 sq. metres gross |
| Burntwood | over 500 sq. metres gross | below 500 sq. metres gross |
| Smaller Centres | over 200 sq. metres gross | not required |

28. We agree that the hierarchy of centres set out in the document 'Core Strategy: Shaping our District' is an appropriate hierarchy of centres. The application of the floorspace thresholds for impact assessment should apply to these centres. Therefore, an application for more than 1,000 sq.m. gross floorspace within the urban area of Lichfield and more than 500 sq.m. gross floorspace within the urban area of Burntwood (outside the defined primary shopping areas) would be subject to an impact assessment. A retail proposal of more than 200 sq.m. would also require an impact assessment if it is located in any of the Key Rural Centres or within the catchment area of any of the Neighbourhood Centres.

29. The Council should use its annual monitoring reports to keep the retail evidence base under review in order to inform consideration of the impact of policies and planning applications. We recommend that health checks of Lichfield and Burntwood centres are carried out annually and that the Council considers making use of the Benchmarking approach to health checks developed by Action for Market Towns.

30. Section 7 also suggests 'locally important impacts' on centres which should be tested in impact assessments of new development proposals.

## 1. INTRODUCTION

1.1 This report has been commissioned by Lichfield District Council to assist the Council in preparing retail policies in the LDF Core Strategy. It sets out the planning context for the Core Strategy on retail policy. A summary is made of national policy advice on town centre uses in Planning Policy Statement 4 (PPS4). An assessment is made of future shopping needs in Lichfield city centre and Burntwood town centre in the LDF period to 2028. Reviews are made of Lichfield city centre and Burntwood town centre and advice is given on sites for future shopping development. Retail impact assessments are made of new retail developments in Lichfield and an enlarged town centre at Burntwood. Finally, comments are made on the application of other PPS4 policy advice.

1.2 The report updates previous reports prepared for the District Council by England & Lyle – Evidence on Retail Matters for the LDF Core Strategy (July 2007) and Evidence on Retail Matters for the LDF Core Strategy: 2009 Update (April 2009). It also refers to the report Evidence on Retail Matters: Supplementary Report on Need (April 2010). The tables in the April 2010 report have been updated and the revised tables are included in the Appendices to the current report.

1.3 The Regional Spatial Strategy (RSS) for the West Midlands was revoked by the Government in July 2010 but it continues to form part of the development plan until it is finally abolished through the enactment of the Localism Bill. Although some references are made to the RSS in this report, they are included only for their historic relevance.

1.4 The consultation period on the Core Strategy: Shaping Our District report ended in February 2011. The Council envisages that the timetable for completion of the Core Strategy will include a formal publication consultation in early summer 2012; submission to the Secretary of State in Autumn 2012; Examination in Public (Hearing Sessions) in late 2012; and adoption in Spring 2013.

1.5 The Land Allocations and Site Development Policies DPD will identify the requirements for the development of sites and areas that will contribute to the Core Strategy. A draft DPD is planned for publication in September 2012 followed by submission to the Secretary of State, Examination and adoption in 2013.

1.6 As a context to this report it is helpful to state the relevant policy and supporting text in the 'Core Strategy: Shaping our District' document. Core Policy 8: Our Centres states that:

> "Development proposals for retail, leisure, office and cultural facilities will be focused within the commercial centres of Burntwood and Lichfield City. In Lichfield City and Burntwood, town centre boundaries will be considered through the Allocations of Land DPD. Retail Assessments will be required in line with Development Management Policy E1."

In Lichfield City Centre retail development will be encouraged up to an additional 35,000m² gross together with up to 30,000m² gross of office provision. All proposals should have regard to the need to protect and enhance the City's historic character."

In Burntwood, support will be given for an enlarged town centre to meet local needs. The District Council will encourage new retail development to a limit of 16,000m² gross (of which 13,000m² gross would be comparison goods) together with up to 5,000m² gross office floorspace."

1.7 The hierarchy of centres defined in the 'Core Strategy: Shaping our District' document is:

| | |
|---|---|
| **Strategic Centre**<br>*(with many shops, services, employment and entertainment which service a much wider catchment than just the local population)* | Lichfield |
| **Town Centre**<br>*(shops and services primarily serving local catchments but providing for main weekly convenience shopping)* | Burntwood |
| **Key Rural Centres**<br>*(shops and services for day to day needs within villages to serve the wider rural area)* | Alrewas, Armitage with Handsacre, Fazeley, Fradley, Little Aston, Shenstone & Whittington |
| **Neighbourhood Centres**<br>*(shops and services for day to day needs within urban neighbourhoods)* | e.g. Boley Park, Curborough, Darwin Park, Netherstowe, Weston Road, Morley Road, Parkhill Road, Chasetown, Swan Island |
| **Proposed Neighbourhood Centres** | South Lichfield, Streethay, East of Rugeley |

## 2. NATIONAL POLICY ADVICE ON TOWN CENTRE USES

### Summary of PPS4 Policy Advice

2.1 This Section first summarises the PPS4 policies relating to main town centre uses at the local level.

***Policy EC1 – Using Evidence to Plan Positively***

2.2 At the local level, the evidence base should:

- assess the detailed need for land or floorspace for all main town centre uses over the plan period
- identify any deficiencies in the provision of local convenience shopping and other facilities which serve people's day-to-day needs
- assess the existing and future supply of land available for economic development
- assess the capacity of existing centres to accommodate new town centre development, taking account of the role of centres in the hierarchy and identify centres in decline where change needs to be managed.

2.3 When assessing the need for retail and leisure development local planning authorities should:

- take account of both the quantitative and qualitative need for additional floorspace for different types of retail and leisure developments.
- in deprived areas which lack access to a range of services and facilities, give additional weight to meeting these qualitative deficiencies.
- when assessing quantitative need, have regard to relevant market information and economic data, including a realistic assessment of population, forecast expenditure on comparison and convenience goods and for main leisure sectors, and forecast improvements in retail sales density.
- when assessing qualitative need for retail and leisure uses:
  - assess whether there is provision and distribution of shopping, leisure and local services, which allow genuine choice to meet the needs of the whole community, particularly those living in deprived areas, in light of the objective to promote the vitality and viability of town centres and the application of the sequential approach
  - take into account the degree to which shops may be overtrading and whether there is a need to increase competition and retail mix.

***Policy EC2: Planning for Sustainable Economic Growth***

2.4 Local planning authorities should ensure that their development plan:

- sets out a clear economic vision and strategy for their area

- seeks to make the most efficient and effective use of land, prioritising previously developed land which is suitable for re-use
- identifies a range of sites, to facilitate a broad range of economic development, including mixed use. Existing site allocations should not be carried forward from one version of the development plan to the next without evidence of the need and a reasonable prospect of their take up during the plan period. If there is no reasonable prospect of a site being used for the allocated economic use, the allocation should not be retained, and wider economic uses or alternative uses should be considered
- encourages new uses for vacant or derelict buildings, including historic buildings.

***Policy EC3: Planning for Centres***

2.5 Local planning authorities should, as part of their economic vision for their area, set out a strategy for the management and growth of centres over the plan period. As part of their strategy local planning authorities should:

- set flexible policies for their centres which are able to respond to changing economic circumstances and encourage, where appropriate, high-density development accessible by public transport, walking and cycling
- define a network (the pattern of provision of centres) and hierarchy (the role and relationship of centres in the network) of centres that is resilient to anticipated future economic changes, to meet the needs of their catchments having:
  - made choices about which centres will accommodate any identified need for growth in town centre uses, considering their expansion where necessary, taking into account the need to avoid an over concentration of growth in centres. Identified deficiencies in the network of centres should be addressed by promoting centres to function at a higher level in the hierarchy or designating new centres where necessary, giving priority to deprived areas which are experiencing significant levels of 'multiple deprivation' where there is a need for better access to services, facilities and employment by socially excluded groups
  - ensured any extensions to centres are carefully integrated with the existing centre in terms of design including the need to allow easy pedestrian access
  - where existing centres are in decline, considered the scope for consolidating and strengthening these centres by seeking to focus a wider range of services there, promoting the diversification of uses and improving the environment
  - where reversing decline in existing centres is not possible, considered reclassifying the centre at a lower level within the hierarchy of centres, reflecting this revised status in the policies applied to the area. This may include allowing retail units to change to other uses, whilst aiming, wherever possible, to retain opportunities for vital local services
  - ensured that the need for any new, expanded or redeveloped out-of-centre

regional or sub-regional shopping centre or any significant change in the role and function of centres is considered through the regional spatial strategy.

- define the extent of the centre and the primary shopping area in their Adopted Proposals Map having considered distinguishing between realistically defined primary and secondary frontages in designated centres and set policies that make clear which uses will be permitted in such locations
- consider setting floorspace thresholds for the scale of edge-of- centre and out-of-centre development which should be subject to an impact assessment under (EC16) and specify the geographic areas these thresholds will apply to
- define any locally important impacts on centres which should be tested
- encourage residential or office development above ground floor retail, leisure or other facilities within centres, ensuring that housing in out-of-centre mixed-use developments is not, in itself, used as a reason to justify additional floorspace for main town centre uses in such locations, and
- identify sites or buildings within existing centres suitable for development, conversion or change of use.

***Policy EC4: Planning for Consumer Choice and Promoting Competitive Town Centres***

2.6 Local planning authorities should proactively plan to promote competitive town centre environments and provide consumer choice by:

- supporting a diverse range of uses which appeal to a wide range of age and social groups, ensuring that these are distributed throughout the centre
- planning for a strong retail mix so that the range and quality of the comparison and convenience retail offer meets the requirements of the local catchment area, recognising that smaller shops can significantly enhance the character and vibrancy of a centre
- supporting shops, services and other important small scale economic uses (including post offices, petrol stations, village halls and public houses) in local centres and villages.
- identifying sites in the centre, or failing that on the edge of the centre, capable of accommodating larger format developments where a need for such development has been identified
- retaining and enhancing existing markets and, where appropriate, re-introducing or creating new ones, ensuring that markets remain attractive and competitive by investing in their improvement
- taking measures to conserve and, where appropriate, enhance the established character and diversity of their town centres.

2.7 Local planning authorities should manage the evening and night-time economy in centres. Policies should:

- encourage a diverse range of complementary evening and night-time uses which appeal to a wide range of age and social groups, making provision, where appropriate, for leisure, cultural and tourism activities such as cinemas, theatres, restaurants, public houses, bars, nightclubs and cafes, and

- set out the number and scale of leisure developments they wish to encourage taking account of their potential impact, including the cumulative impact, on the character and function of the centre, anti-social behaviour and crime, including considering security issues raised by crowded places, and the amenities of nearby residents.

***Policy EC5: Site Selection and Land Assembly for Main Town Centre Uses***

2.8 Local planning authorities should identify an appropriate range of sites to accommodate the identified need, ensuring that sites are capable of accommodating a range of business models in terms of scale, format, car parking provision and scope for disaggregation. An apparent lack of sites of the right size and in the right location should not be a reason for local planning authorities to avoid planning to meet the identified need for development. Local planning authorities should:

- base their approach on the identified need for development
- identify the appropriate scale of development, ensuring that the scale of the sites identified and the level of travel they generate, are in keeping with the role and function of the centre within the hierarchy of centres and the catchment served
- apply the sequential approach to site selection
- assess the impact of sites on existing centres
- consider the degree to which other considerations such as any physical regeneration benefits of developing on previously-developed sites, employment opportunities, increased investment in an area or social inclusion, may be material to the choice of appropriate locations for development.

2.9 Sites for main town centre uses should be identified through a sequential approach to site selection. Under the sequential approach, local planning authorities should identify sites that are suitable, available and viable in the following order:

- locations in appropriate existing centres where sites or buildings for conversion are, or are likely to become, available within the plan period
- edge-of-centre locations, with preference given to sites that are or will be well-connected to the centre
- out-of-centre sites, with preference given to sites which are or will be well served by a choice of means of transport and which are closest to the centre and have a higher likelihood of forming links with the centre.

2.10 Sites that best serve the needs of deprived areas should be given preference when considered against alternative sites with similar location characteristics.

2.11 In assessing the impact of proposed locations for development local planning authorities should:

- take into account the impact considerations set out in Policy EC16, particularly for developments over 2,500 sq.m. or any locally set threshold under EC3, ensuring that any proposed edge of centre or out of centre sites would not have an unacceptable impact on centres within the catchment of the potential development
- ensure that proposed sites in a centre, which would substantially increase the attraction of that centre and could have an impact on other centres, are assessed for their impact on those other centres, and
- ensure that the level of detail of any assessment of impacts is proportionate to the scale, nature and detail of the proposed development.

2.12 Having identified sites for development, local planning authorities should allocate sufficient sites in development plan documents to meet at least the first five years identified need. Where appropriate, local development frameworks should set out policies for the phasing and release of allocated sites to ensure that those sites in preferred locations within centres are developed ahead of less central locations.

***Policy EC9: Monitoring***

2.13 Local planning authorities should use their annual monitoring reports to keep the following matters under review (at the local level) in order to inform consideration of the impact of policies and planning applications:

- the network and hierarchy of centres
- the need for further development and
- the vitality and viability of centres.

2.14 To measure the vitality and viability and monitor the health of their town centres over time and inform judgements about the impact of policies and development, local authorities should also regularly collect market information and economic data, preferably in co-operation with the private sector, on the key indicators set out at Annex D to PPS4.

**Meeting Future Needs**

2.15 The remainder of this Section takes the advice in the above policies and relates it to the main requirements of PPS4 in terms of plan-making by local authorities. It is set out in the form of a checklist of what the Council is required to do to meet PPS4 advice.

***Network and Hierarchy of Centres***

2.16 The Council should:

Define a network and hierarchy of centres that is resilient to anticipated future economic changes, to meet the needs of their catchments. This has been done in the preparation of the LDF.

***Quantitative Need***

2.17 The Council should:

Assess the detailed need for land or floorspace for retail uses over the plan period, taking account of both the quantitative and qualitative need for additional floorspace for different types of retail developments.

In assessing quantitative need, have regard to relevant market information and economic data, including a realistic assessment of population, forecast expenditure on comparison and convenience goods and forecast improvements in retail sales density.

2.18 Quantitative need (retail capacity) was assessed in the report 'Supplementary Report on Need' (April 2010) and it is reviewed in Section 3 of this report. The floorspace capacity identified for Lichfield and Burntwood is referred to in Sections 4 and 5.

***Qualitative Need***

2.19 When assessing qualitative need for retail development the Council should:

Assess whether there is adequate provision and distribution of shopping and other services, which allow genuine choice to meet the needs of the whole community.

In deprived areas which lack access to a range of services and facilities, give additional weight to meeting these qualitative deficiencies.

Identify any deficiencies in the provision of local convenience shopping and other facilities which serve people's day-to-day needs.

Take into account the degree to which shops may be overtrading and whether there is a need to increase competition and retail mix.

Support shops, services and other important small scale economic uses (including post offices, petrol stations, village halls and public houses) in local centres and villages.

2.20 Qualitative need is assessed in this report with reference to future needs in Lichfield city centre and Burntwood town centre. Policy on Smaller Centres is discussed later in this Section.

**Identifying Sites**

2.21 The Council should:

Assess the capacity of existing centres to accommodate new retail development, taking account of the role of centres in the hierarchy.

Identify a range of sites to meet the identified need for development (ensuring that sites are capable of accommodating a range of business models in terms of scale, format, car parking provision and scope for disaggregation).

Identify the appropriate scale of development, ensuring that the scale of the sites identified and the level of travel they generate, are in keeping with the role and function of the centre within the hierarchy of centres and the catchment served.

Identify sites or buildings within existing centres suitable for development, conversion or change of use (including new uses for vacant or derelict buildings, including historic buildings).

Identify sites in the centre, or failing that on the edge of the centre, capable of accommodating larger format developments where a need for such development has been identified.

Identify centres in decline where change needs to be managed.

Review existing site allocations so that they are not carried forward from one version of the development plan to the next without evidence of need and a reasonable prospect of their take up during the plan period.

Allocate sufficient sites in development plan documents to meet at least the first five years identified need. Where appropriate, local development frameworks should set out policies for the phasing and release of allocated sites to ensure that those sites in preferred locations within centres are developed ahead of less central locations.

2.22 Sites for development in Lichfield city centre and Burntwood town centre are identified in this report. Details are given in Sections 4 and 5. There are no centres in decline in Lichfield District where change needs to be managed.

**Sequential Approach**

2.23 The Council should:

Apply the sequential approach to site selection, giving preference to sites within centres, then edge-of-centre locations then out-of-centre locations.

Give preference to sites that best serve the needs of deprived areas over alternative sites with similar location characteristics.

2.24 Sequential site issues are considered for Lichfield and Burntwood centres in Sections 4 and 5.

**Assessing Impact**

2.25 The Council should:

Assess the impact of proposed sites on existing centres:

- taking into account the impact considerations set out in Policy EC16, ensuring that any proposed edge-of-centre or out-of-centre sites would not have an unacceptable impact on centres within the catchment of the potential development
- ensuring that proposed sites in a centre, which would substantially increase the attraction of that centre and could have an impact on other centres, are assessed for their impact on those other centres, and
- ensuring that the level of detail of any assessment of impacts is proportionate to the scale, nature and detail of the proposed development.

Consider the degree to which other considerations such as any physical regeneration benefits of developing on previously-developed sites, employment opportunities, increased investment in an area or social inclusion, may be material to the choice of appropriate locations for development.

2.26 Impact assessments of sites identified for future retail development in Lichfield and Burntwood centres are undertaken in Section 6.

**Other Requirements**

2.27 Section 7 of this report discusses the application of other aspects of PPS4 policy advice. This advice relates to:

***(a) Definition of Boundaries***

2.28 The Council should define the extent of the main centres and the primary shopping area in its Proposals Map having considered distinguishing between realistically defined primary and secondary frontages in designated centres and set policies that make clear which uses will be permitted in such locations. Boundaries of centres and primary shopping areas for Lichfield and Burntwood are defined in Section 7.

***(b) Floorspace Thresholds***

2.29 The Council should consider setting floorspace thresholds for the scale of retail development outside centres (i.e. edge-of-centre and out-of-centre locations) which should be subject to an impact assessment under Policy EC16 and specify the geographic areas these thresholds will apply to. Floorspace thresholds are proposed in Section 7.

***(c) Locally Important Impacts***

2.30 The Council should define any locally important impacts on centres which should be tested in impact assessments of new development proposals under Policy EC16. Locally important impacts are discussed in Section 7.

***(d) Monitoring***

2.31 The Council should use its annual monitoring reports to keep the following matters under review in order to inform consideration of the impact of policies and planning applications:

- the network and hierarchy of centres
- the need for further development and
- the vitality and viability of centres.

2.32 To measure the vitality and viability and monitor the health of town centres in Lichfield District over time and inform judgements about the impact of policies and development, the Council should also regularly collect market information and economic data on the key indicators set out at Annex D to PPS4. Advice on monitoring is given in Section 7.

***(e) Policy on Smaller Centres***

2.33 PPS4 does not specifically give policy advice on smaller centres, although it does refer to the need for local authorities to take account of the requirements of its smaller centres, for example in:

- identifying any deficiencies in the provision of local convenience shopping and other facilities which serve people's day-to-day needs
- supporting shops, services and other important small scale economic uses in local centres and villages.
- ensuring that the scale of sites identified is in keeping with the role and function of the centre within the hierarchy of centres and the catchment served.

2.34 The aspects of PPS4 policy advice covered above are concentrated on Lichfield city centre and Burntwood town centre. In Section 7 we also put forward advice on the smaller centres in Lichfield District.

**Draft National Planning Policy Framework Policy on Town Centres**

2.35 The Government's draft National Planning Policy Framework (NPPF) was published for consultation in July 2011 and the consultation period ended in October 2011. The NPPF will replace planning policy statements including PPS4. It includes a statement of Core Planning Principles that apply to all land uses. Unlike PPS4 there is no definition of "main town centre uses".

2.36 In relation to plan-making the need for a good evidence base is confirmed but there is less detail on the type of evidence required on economic development uses than in PPS4. Planning policies should continue to promote the vitality and viability of town centres but again the draft is short on detailed advice on policies for town centres.

2.37 In determining applications the draft NPPF has a presumption in favour of sustainable development but it also emphasises the need to support economic growth through the planning system. The general impact considerations in PPS4 Policy EC10 have been deleted. The implication is that these considerations will be part of other supporting documents rather than retail assessments. Applications will still have to include a sequential assessment but only for retail and leisure uses, not office development. There is no mention of the need to demonstrate flexibility in the application of the sequential approach that is stated in PPS4 Policy EC15.

2.38 Impact assessments (as required under PPS4 Policy EC16) will also still have to be carried out for retail and leisure proposals with an emphasis on impact on investment in centres and impact on the vitality and viability of centres, including local consumer choice and trade in centres, over a ten year time horizon (compared to the 5 year timescale in PPS4). Impact assessments will be required for proposals over 2,500 sq. metres or any locally set floorspace threshold. The need for impact assessments for proposals within a centre (PPS4 Policy EC14.6) has been removed.

2.39 The draft NPPF does not maintain the advice on the determination of applications that is stated in PPS4 Policy EC17. There is no reference to the refusal of applications that fail to satisfy the sequential approach or proposals that would have a significant adverse impact, or the need to balance positive and negative impacts.

2.40 As well as the removal of any definition of main town centre uses, other definitions listed in PPS4 Annex B are excluded, notably ‘district centres’, ‘local centres’, ‘convenience’ and ‘comparison’ shopping, ‘supermarkets’ and ‘superstores’. There is no change in the definition of ‘edge-of-centre’ but the detailed explanation in PPS4 has been dropped. The definition of ‘out-of-centre’ is unchanged but the term ‘out-of-town’ has been omitted.

2.41 In August 2011 the Planning Inspectorate produced advice for Planning Inspectors on the interpretation of the draft NPPF, stating that it can be a material consideration in planning decisions, although the weight to be given to it is a matter of judgement.

## 3. FUTURE SHOPPING NEEDS

### Need Assessment

3.1 In July 2007 England & Lyle prepared a report for Lichfield District Council entitled 'Evidence on Retail Matters for the LDF Core Strategy. This report was revised in April 2009 as the '2009 Update'. The Council requested England & Lyle to review the forecasts of retail expenditure and need in the 2009 Update because of the economic downturn and its effect on future expenditure growth prospects, and the implications for the floorspace limits for Lichfield and Burntwood proposed in the Core Strategy. A Supplementary Report on Need was prepared in April 2010. A further update of the need assessment has been carried out for the current report. It

(1) updates the need assessment in the April 2010 report taking account of the latest retail expenditure forecasts by Pitney Bowes (formerly MapInfo) in September 2011 and a review of the growth in sales densities that is consistent with lower rates of expenditure growth
(2) takes account of the latest population forecasts for Lichfield District from the ONS 2008-based population projections and the distribution of population within the study area based on the anticipated allocations of new housing in the District.
(3) reviews the floorspace limits for Lichfield and Burntwood centres that should be used in the Core Strategy, based on the revised capacity analysis.

In this report the LDF forecast year has been extended from 2026 to 2028.

### *Population and Expenditure*

3.2 Population forecasts for Lichfield District as a whole have been updated and extended to 2028 using the ONS 2008-based projections for local authority areas. The distribution of population growth between zones in Lichfield District is based on the allocations of housing growth in the LDF Preferred Options. It takes account of the preferred distribution of new housing in Lichfield, Burntwood and other key settlements, as follows.

| Zone | % of District Total | Notes on Distribution |
|---|---|---|
| Burntwood wards | 12.5% | |
| Lichfield wards | 50% | |
| Northern Rural wards | 14.5% | mostly in Rugeley suburbs (Armitage with Handsacre) |
| Eastern Rural wards | 14% | mostly in Fradley and Alrewas |
| Southern Rural wards | 9% | mostly in Tamworth suburbs (Fazeley ward) |

3.3 In the Walsall and Cannock Chase District wards within the study area the extent of population growth is also in line with the ONS 2008-based population projections, applying the same growth rates as in these Districts as a whole.

3.4 The population forecasts by ward have been aggregated into zones. The population projections by zone and ward are shown in detail in Appendix 1. The zone totals are summarised below.

| **Population by zone** | **2006** | **2011** | **2016** | **2021** | **2028** |
|---|---|---|---|---|---|
| Burntwood wards | 30,416 | 31,549 | 32,024 | 32,524 | 33,112 |
| Lichfield wards | 29,136 | 30,221 | 32,121 | 34,121 | 36,470 |
| Northern Rural wards | 10,733 | 11,132 | 11,683 | 12,263 | 12,945 |
| Eastern Rural wards | 11,832 | 12,272 | 12,804 | 13,364 | 14,022 |
| Southern Rural wards | 14,583 | 15,125 | 15,467 | 15,827 | 16,250 |
| **Lichfield District Total** | **96,700** | **100,300** | **104,100** | **108,100** | **112,800** |
| Walsall District wards | 25,092 | 25,408 | 25,789 | 26,243 | 26,847 |
| Cannock Chase District wards | 23,985 | 24,748 | 25,163 | 26,606 | 26,180 |
| **Study Area Total** | **145,777** | **150,456** | **155,053** | **159,950** | **165,827** |

3.5 We have adopted the base data on per capita expenditure by ward from the 2004 Retail Study. It is still valid as base data and it represents a detailed and accurate picture of local expenditure at that time. For consistency with the Retail Study we have retained the 2001 price base. The 2001 base data on per capita expenditure by ward and zone are shown in Appendix 2, excluding special forms of trading. Projections have been made of per capita expenditure in 2006 and in the forecast years of 2011, 2016, 2021 and 2028 for convenience goods (Appendix 2A) and comparison goods (Appendix 2B). The projections are based on the latest forecasts in the Pitney Bowes Retail Expenditure Guide 2011/2012 (September 2011) using the OEF forecasts from the UK consumer spending model. The annual growth rates are as follows:

| <u>Convenience goods</u> | <u>Comparison goods</u> |
|---|---|
| 2006-2010: actual growth -2.8%overall | 2006-2010: actual growth 6.3% overall |
| 2010-2016: forecast growth 0.5% p.a. | 2010-2016: forecast growth 3.9% p.a. |
| 2016-2021: forecast growth 0.5% p.a. | 2016-2021: forecast growth 4.0% p.a. |

3.6 In the longer term we assume that the same growth rates will continue from 2021 to 2028.

3.7 It is necessary to exclude non-store retail sales (formerly ‘special forms of trading’) such as Internet shopping from the forecasts of per capita expenditure. The latest Pitney Bowes data shows that non-store retail sales on convenience goods are expected to increase from 3.2% in 2006 to 5.5% in 2011, and non-store retail sales on comparison goods are expected to increase from 7.7% in 2006 to 12.8% in 2011. The forecasts of non-store retail sales are shown below. The percentages are assumed to remain unchanged between 2021 and 2028.

| Non-Store Retail Sales | 2006 | 2011 | 2016 | 2021 | 2028 |
|---|---|---|---|---|---|
| Convenience goods | 3.2% | 5.5% | 6.3% | 6.5% | 6.5% |
| Comparison goods | 7.7% | 12.8% | 14.4% | 14.7% | 14.7% |

3.8 The tables in Appendix 3 show forecasts of total expenditure in the study area by ward and zone in convenience goods (Appendix 3A) and comparison goods (Appendix 3B), excluding non-store retail sales. We have multiplied the population in each ward by the per capita expenditure in each ward for convenience and comparison goods separately and aggregated them by zone. The forecasts are summarised below by zone.

| **Convenience Goods Expenditure by zone** | **2006 £m** | **2011 £m** | **2016 £m** | **2021 £m** | **2028 £m** |
|---|---|---|---|---|---|
| Burntwood wards | 48.16 | 47.64 | 49.16 | 50.89 | 53.40 |
| Lichfield wards | 45.52 | 45.03 | 48.65 | 52.87 | 57.65 |
| Northern Rural wards | 17.29 | 17.09 | 18.21 | 19.54 | 21.03 |
| Eastern Rural wards | 19.19 | 18.97 | 20.11 | 21.46 | 23.15 |
| Southern Rural wards | 23.27 | 22.99 | 23.88 | 24.98 | 26.02 |
| Walsall District wards | 40.08 | 38.70 | 39.93 | 41.57 | 44.04 |
| Cannock Chase District wards | 37.90 | 37.29 | 38.55 | 40.13 | 42.49 |
| Study Area Total | 231.41 | 227.71 | 238.49 | 251.45 | 267.78 |

| **Comparison Goods Expenditure by zone** | **2006 £m** | **2011 £m** | **2016 £m** | **2021 £m** | **2028 £m** |
|---|---|---|---|---|---|
| Burntwood wards | 82.73 | 89.54 | 108.02 | 131.88 | 174.68 |
| Lichfield wards | 80.03 | 96.61 | 109.42 | 140.25 | 192.97 |
| Northern Rural wards | 30.67 | 33.15 | 41.28 | 52.19 | 70.87 |
| Eastern Rural wards | 34.86 | 37.70 | 46.72 | 58.79 | 80.05 |
| Southern Rural wards | 41.26 | 44.51 | 54.01 | 66.56 | 87.78 |
| Walsall District wards | 67.69 | 71.52 | 86.28 | 105.93 | 141.65 |
| Cannock Chase District wards | 66.24 | 71.32 | 86.19 | 105.83 | 141.42 |
| Study Area Total | 403.47 | 434.34 | 531.91 | 661.43 | 889.43 |

3.9 In convenience goods the forecast growth of expenditure in the study area between 2011 and 2028 is £40.1m or 18%. In comparison goods the forecast growth of expenditure in the study area between 2011 and 2028 is £455.1m or 105%.

***Capacity Analysis to 2028***

3.10 The capacity analysis comprises a number of steps which are outlined below. The approach is a conventional market share approach, assessing the market share of turnover in the catchment area of each centre in relation to available expenditure.

Catchment Area Expenditure

3.11 In previous reports on the retail evidence base we have advised that the most realistic catchment areas for Lichfield and Burntwood should be defined as follows:

- Lichfield's catchment area includes a primary catchment comprising the 6 Lichfield wards and a secondary catchment comprising the remainder of Lichfield District. The overall catchment is defined as Lichfield District. There is a small inflow of trade into the Lichfield catchment area from outside the District.
- Burntwood's catchment area includes a primary catchment comprising the 8 Burntwood wards and a secondary catchment comprising the wards in Cannock Chase and Walsall Districts that are included within the wider study area. There is a small inflow into the Burntwood catchment from Lichfield and the northern and southern rural zones.

3.12 In the capacity analysis the expenditure estimates and forecasts for these primary and secondary catchments are combined to give total expenditure for the Lichfield and Burntwood catchment areas for convenience and comparison goods.

Turnover

3.13 The household survey carried out by NEMS Market Research for GL Hearn enables survey-based estimates to be made of existing convenience and comparison goods turnover in each catchment area. The 2004 base year figures of turnover are derived from the Retail Study. The approach used is to compare the expenditure in each catchment area with the turnover in Lichfield and Burntwood. Turnover estimates have been made for 2006 by assuming that turnover has increased in line with the growth of expenditure in each catchment area between 2004 and 2006, and by allowing for the new Waitrose store in Lichfield in 2006.

Leakage of Trade and Potential for Clawback

3.14 The difference between expenditure and turnover in the Lichfield and Burntwood catchment areas represents net leakage from these catchment areas. It is a net figure because there will be inflows and outflows of expenditure. The amount of expenditure retained in each catchment area is the market share or retention level. Retention levels have been calculated for the primary and secondary catchments in 2006. Judgements have been made about the likely increase in retention levels up to the forecast years of 2011, 2016, 2021 and 2028. These increases are shown below.

| **Retention Levels, Convenience Goods** | **2006 %** | **2011 %** | **2016 %** | **2021 %** | **2028 %** |
|---|---|---|---|---|---|
| ***Lichfield catchment area*** | | | | | |
| primary catchment | 91 | 95 | 95 | 95 | 95 |
| secondary catchment | 29 | 31 | 31 | 31 | 31 |
| overall retention level | 47 | 50 | 51 | 51 | 52 |
| ***Burntwood catchment area*** | | | | | |
| primary catchment | 52 | 57 | 57 | 57 | 57 |
| secondary catchment | 5 | 5 | 5 | 5 | 5 |
| overall retention level | 23 | 25 | 25 | 25 | 25 |

| **Retention Levels, Comparison Goods** | **2006 %** | **2011 %** | **2016 %** | **2021 %** | **2028 %** |
|---|---|---|---|---|---|
| ***Lichfield catchment area*** | | | | | |
| primary catchment | 45 | 60 | 65 | 65 | 65 |
| secondary catchment | 23 | 25 | 35 | 35 | 35 |
| overall retention level | 29 | 36 | 44 | 45 | 45 |
| ***Burntwood catchment area*** | | | | | |
| primary catchment | 5 | 8 | 25 | 25 | 25 |
| secondary catchment | 2 | 2 | 4 | 4 | 4 |
| overall retention level | 3 | 4 | 12 | 12 | 12 |

| **Retention Levels, Bulky Goods** | **2006 %** | **2011 %** | **2016 %** | **2021 %** | **2028 %** |
|---|---|---|---|---|---|
| ***Lichfield catchment area*** | | | | | |
| overall retention level | 16 | 20 | 20 | 20 | 20 |

3.15 The main assumptions about increases in retention levels are as follows.

*Lichfield catchment area*

- there is potential for a small increase in the convenience goods retention level from 2006 mostly because of recent foodstore developments (Tesco and Lidl)
- there is potential for a moderate increase in the comparison goods retention

level mostly because of the Friarsgate scheme in Lichfield and the LCP scheme commitment in Burntwood. There is also a potential for a moderate increase in the bulky goods retention level.

*Burntwood catchment area*

- there is potential for a small increase in the convenience goods retention level in the primary catchment area because of the Morrisons extension and the approved Aldi store but no allowance is made in these figures for an increase in convenience goods retention if a new supermarket is developed in Burntwood
- there is potential for a significant increase in the comparison goods retention level, mostly in the primary catchment area, because of the LCP scheme commitment and other development opportunities in the town centre.

Expenditure Capacity

3.16 Applying the percentage retention levels to the expenditure forecasts for the primary and secondary catchment areas provides estimates of the expenditure retained in Lichfield and Burntwood in 2011, 2016, 2021 and 2028. The projected future turnover in each centre is then subtracted from this total of expenditure retained. Future turnover of existing shops is estimated by allowing for a growth in sales productivity using growth rates of 0.4% p.a. for convenience goods to 2021, then 0.2% p.a. in the longer term; and 1.7% p.a. for comparison goods. These growth rates are derived from Experian Retail Planner Briefing Note 9, September 2011 because Pitney Bowes do not make forecasts of sales productivity. The difference between expenditure retained and future turnover is the surplus expenditure capacity.

Recent Developments and Commitments

3.17 We have included the Waitrose supermarket at Walsall Road in Lichfield, which opened in 2006, in our turnover estimates for 2006. In the absence of survey data we assume that the Waitrose store is trading at its company average turnover level with an estimated convenience goods turnover of £17.8m in 2001 prices. We also assume that 50% of its turnover is drawn from clawback of leakage and 50% is trade diverted from existing stores in Lichfield. On that basis the additional turnover drawn from within the Lichfield catchment in 2006 is estimated to be £8.9m.

3.18 Allowance must be made for recent developments and commitments (retail developments that already have planning consent). These include:

- the extension to the Morrisons store in Burntwood (for both convenience and comparison goods) – this extension has been implemented
- the Friarsgate redevelopment scheme in Lichfield city centre (principally for comparison goods)
- the out-of-centre Lichfield Retail Park at Eastern Avenue/Vulcan Road, Lichfield (bulky comparison goods) – implemented
- Lidl at Eastern Avenue, Lichfield - implemented
- the replacement Tesco store in Lichfield – implemented
- the local centre in Fradley – implemented
- the Aldi foodstore in Burntwood – not yet started, and
- the London & Cambridge Properties non-food retail development at Burntwood.

3.19 We have estimated the turnover of these schemes based on their net sales areas and estimates of turnover per sq.m. from the relevant supporting documents. We assume that all the commitments will have been built by 2011 except for the Friarsgate scheme and the Aldi store and LCP development in Burntwood which we assume will all be trading by 2016.

Results of the Capacity Analysis

3.20 The long term capacity analysis tables are shown in Appendix 4. The relevant tables are:
Appendix 4A – Convenience goods, Lichfield catchment area
Appendix 4B – Convenience goods, Burntwood catchment area
Appendix 4C – Comparison goods, Lichfield catchment area
Appendix 4D – Comparison goods, Burntwood catchment area
Appendix 4E – Bulky goods, Lichfield catchment area

3.21 Capacity is summarised below.

| **Capacity (£ million)** | **2016** | **2021** | **2028** |
|---|---|---|---|
| Convenience Goods | | | |
| Lichfield | -16.84 | -12.63 | -7.08 |
| Burntwood | -3.13 | -2.58 | -1.34 |
| | | | |
| Comparison Goods | | | |
| Lichfield | -41.63 | -8.47 | 50.31 |
| Burntwood | -3.11 | 3.82 | 16.72 |
| | | | |
| Bulky Goods | | | |
| Lichfield | 2.69 | 7.26 | 16.10 |

3.22 In convenience goods there is no capacity for additional development in Lichfield throughout the period up to 2028, after allowing for recent developments and commitments. In Burntwood there is also no capacity for further convenience goods floorspace up to 2028 after allowing for recent developments and commitments. It should be emphasised that the capacity analysis does not take account of any future convenience goods retail development that is not already approved. Any proposal for new development will have to be assessed in relation to its potential to increase the retention level beyond the forecasts we have made. In our view there is very little potential for an increase in the convenience goods retention level in Lichfield, which already has a very high retention level in its primary catchment area. However, the retention level in the Burntwood primary catchment area is not as high and there is potential for further surplus capacity to support new convenience goods floorspace if some of the area we identify as development opportunities is used for the development of a new supermarket.

3.23 In comparison goods there is a negative capacity for additional development in Lichfield up to 2021 because the available capacity is taken up by the commitment for the Friarsgate redevelopment scheme in Lichfield. However, there is predicted to be a significant surplus capacity in 2028 to support further comparison goods development in Lichfield. In Burntwood there is a negative capacity for additional development in 2016 because of the commitment for the LCP Hoardings scheme. There is a small capacity for additional comparison goods development in Burntwood in 2021 after allowing for the committed LCP scheme, and a moderate capacity for further comparison goods shopping in 2028.

3.24 There is a small capacity for additional bulky goods development in the Lichfield catchment area from 2016 onwards. Some of this bulky goods capacity could be met in Burntwood as well as in Lichfield.

***Floorspace Capacity***

3.25 The long term capacity forecasts have been used to estimate floorspace capacity in Lichfield and Burntwood up to 2028. Floorspace capacity is expressed as gross as well as net floorspace in order to represent the overall physical scale of development that needs to be accommodated.

3.26 A range of sales densities has been applied to the capacity forecasts. For <u>convenience goods</u> the range is £4,000 to £11,000 per sq.m. net in 2011. The upper figure of £11,000 per sq.m. is an average for main foodstore operators and the lower figure of £4,000 per sq.m. net is an average for discount foodstores. In convenience goods an allowance is made for growth in sales density of 0.4% p.a. from 2011 to 2021, then 0.2% p.a. to 2028.

| | Range of sales per sq.m. net | |
|---|---|---|
| 2011 | £4,000 | £11,000 |
| 2016 | £4,080 | £11,222 |
| 2021 | £4,163 | £11,448 |
| 2026 | £4,222 | £11,609 |

3.27 In comparison goods a lower initial sales density is used, based on the existing average for Lichfield city centre of about £4,000 per sq.m. net derived from the GL Hearn Retail Study. An upper figure of £5,700 per sq.m. net is used, based on the turnover for Lichfield city centre shown in the West Midlands Regional Centres Study. In comparison goods an allowance is made for growth in sales density of 1.7% p.a. from 2011 onwards. Therefore for comparison goods the sales densities are as follows:

| | Range of sales per sq.m. net | |
|---|---|---|
| 2011 | £4,000 | £5,700 |
| 2016 | £4,352 | £6,201 |
| 2021 | £4,734 | £6,747 |
| 2028 | £5,327 | £7,592 |

3.28 In the case of bulky goods no range is adopted because it is commonly accepted that the average sales density for bulky goods retail warehouses is around £3,000 per sq.m. net. Again an allowance is made for a growth in sales density of 1.7% p.a. Therefore for bulky goods the sales densities are as follows:

| | Sales per sq.m. net |
|---|---|
| 2011 | £3,000 |
| 2016 | £3,264 |
| 2021 | £3,551 |
| 2026 | £3,995 |

3.29 Details of the floorspace capacities based on these sales densities are shown in Appendix 5. The approach used is to take the residual capacities (after allowing for commitments) calculated in Appendix 4 and to apply the range of sales densities shown above to calculate net floorspace. Gross floorspace is then estimated by applying typical net/gross floorspace ratios of 70% for convenience and comparison goods and 80% for bulky goods.

3.30 Details are shown in the following Appendices:
Appendix 5A – Floorspace Capacity, Convenience Goods
Appendix 5B – Floorspace Capacity, Comparison Goods
Appendix 5C – Floorspace Capacity, Bulky Goods

3.31 The gross floorspace capacity is summarised below. The range reflects the application of a range of sales densities. The figures in the table are rounded for simplicity.

| **Floorspace Capacity** (sq. metres gross) | **2016** | **2021** | **2028** |
|---|---|---|---|
| <u>Convenience Goods</u> | | | |
| Lichfield | nil | nil | nil |
| Burntwood | nil | nil | nil |
| | | | |
| <u>Comparison Goods</u> | | | |
| Lichfield | nil | nil | 9,500 - 13,500 |
| Burntwood | nil | 800 - 1,200 | 3,100 - 4,500 |
| | | | |
| <u>Bulky Goods</u> | | | |
| Lichfield | 1,000 | 2,600 | 5,000 |

3.32 In <u>convenience goods</u> there is no floorspace capacity throughout the LDF period. If there was to be any floorspace capacity, the higher figures in the range would represent a situation in which all the capacity is taken up by discount foodstores, which is very unlikely. The capacity is more likely to be at the lower end of the range based on a higher sales density. In Lichfield there may be some potential in the longer term for a small foodstore or an extension of one of the existing foodstores if an increase in the retention level can be justified. In Burntwood (after allowing for the Morrisons extension and Aldi commitment) there is no further potential for another supermarket or a discount foodstore based on low expenditure growth and forecast retention levels. However, the convenience floorspace capacity in Burntwood would increase if allowance is made for a new supermarket development.

3.33 In <u>comparison goods</u> there is no capacity for additional development in Lichfield until after 2021 because of the major commitment at Friarsgate. The significant surplus capacity in 2028 could be met by further redevelopment in the city centre. It would be most appropriate to adopt the lower figure in the range of floorspace capacity for Lichfield, which is based on a sales density that is applicable to new 'High Street' shopping floorspace. The Bird Street car park and Backcester Lane areas are identified in Section 4 as having potential for retail development after completion of the Friarsgate scheme. There is a moderate capacity for additional comparison goods development in Burntwood in the longer term in addition to the LCP Hoardings scheme. Further information is given in Section 5. Again, it would be most appropriate to adopt the lower figure in the range of floorspace capacity for Burntwood, which is based on a sales density that is applicable to new 'High Street' shopping floorspace.

3.34 In bulky goods there is a modest floorspace capacity for additional bulky goods development in Lichfield District which would be sufficient to support further retail warehouse development, of a similar size to that recently developed at Eastern Avenue as the Lichfield Retail Park. Some of the potential for bulky goods development within the Lichfield catchment area could be met in Burntwood, for instance on the LCP Hoardings site.

**Floorspace Limit, Lichfield**

3.35 The report 'Supplementary Report on Need' (April 2010) assesses that in Lichfield there is very little capacity for additional convenience goods retail development up to 2021, after allowing for the replacement Tesco foodstore, and there is a modest capacity for further convenience goods shopping in the longer term. In comparison goods the report assesses that there is a negative capacity for additional development in Lichfield up to 2021 because the available capacity is taken up by the commitment for the Friarsgate redevelopment scheme in Lichfield. There was predicted to be a surplus capacity in 2026 to support further comparison goods development. There was a moderate capacity for additional bulky goods development in the Lichfield catchment area from 2016 onwards.

3.36 In the current report, our review of quantitative need based on more up-to-date expenditure forecasts indicates that there is now no capacity for additional convenience goods floorspace in Lichfield to 2028 because expenditure growth between 2011 and 2028, allowing for the amount of expenditure retained, will be exceeded by commitments for new convenience goods floorspace. In comparison goods there is forecast to be a much greater growth of expenditure but because of major commitments (particularly the Friarsgate scheme) there will only be a surplus capacity for additional comparison goods floorspace in Lichfield after 2021.

3.37 In Lichfield an appropriate floorspace limit should include the committed Friarsgate redevelopment scheme with a floorspace of 22,000 sq.m. gross, other recent developments and commitments, and the additional floorspace capacity we have identified by 2028 which could be accommodated on sites within the city centre. The total amount of floorspace that could be supported in Lichfield up to 2028, including recent developments and commitments, is 41,000 sq.m. gross of which 36,000 sq.m. gross is in comparison goods. This floorspace limit includes the replacement Tesco store on the edge of the city centre and the recently developed out-of-centre Lidl supermarket and Lichfield Retail Park on Eastern Avenue.

3.38 Some of the additional floorspace capacity is in bulky goods (up to 5,000 sq.m. gross) which would have to be accommodated outside the city centre. Therefore we suggest that the LDF Core Strategy should refer to a floorspace limit of 36,000 sq.m. gross to meet city centre shopping needs, of which 31,000 sq.m. gross is for comparison goods.

3.39 The floorspace limit for Lichfield is summarised below (figures are rounded).

| Floorspace (sq.m. gross) | Convenience | Comparison | Total |
|---|---|---|---|
| Friarsgate scheme | 1,500 | 20,500 | 22,000 |
| replacement Tesco | 2,000 | 3,000 | 5,000 |
| Lidl, Eastern Avenue | 1,500 | - | 1,500 |
| Lichfield Retail Park | - | 3,000 | 3,000 |
| additional capacity | - | 9,500 | 9,500 |
| Total | 5,000 | 36,000 | 41,000 |
| less bulky goods | - | 5,000 | 5,000 |
| Floorspace limits | 5,000 | 31,000 | 36,000 |

3.40 The Friarsgate redevelopment scheme has not yet started and may not be completed until 2016. The proposed limit allows for an additional 11,000 sq.m. gross of retail floorspace (including bulky goods) over and above that committed at Friarsgate in the LDF period to 2028, and of this total the LDF should seek to accommodate 6,000 sq.m. gross in the city centre. We believe this is an appropriate scale of further development for Lichfield.

**Floorspace Limit, Burntwood**

3.41 The report 'Supplementary Report on Need' (April 2010) assesses that in Burntwood there is a small capacity for further convenience goods floorspace after allowing for the Morrisons extension. There is potential in the longer term for another supermarket or a discount foodstore.

3.42 The report assesses that there is no capacity for additional comparison goods development in Burntwood in the medium term after allowing for the committed LCP scheme but there is a limited capacity for additional comparison goods development in Burntwood in the longer term. It also acknowledges that some of the floorspace capacity for additional bulky goods development in Lichfield District could be met in Burntwood.

3.43 In the current report, our review of quantitative need based on more up-to-date expenditure forecasts indicates that there is now no capacity for additional convenience goods floorspace in Burntwood to 2028 because expenditure growth between 2011 and 2028, allowing for the amount of expenditure retained, will be exceeded by commitments for new convenience goods floorspace. In comparison goods there is forecast to be a higher growth of expenditure but because of the commitment for the LCP Hoardings scheme there will only be a modest capacity for additional comparison goods floorspace in Burntwood

3.44 An appropriate floorspace limit for Burntwood should include the committed LCP scheme which has gross floorspace of about 9,000 sq.m., the Morrisons extension (1,000 sq.m. gross), the approved Aldi store (1,000 sq.m. gross) and the additional floorspace capacity of 3,000 sq.m. gross we have identified by 2028 which could be accommodated on the Olaf Johnson site. The total floorspace capacity is about 14,000 sq.m. gross of which 13,000 sq.m. gross is in comparison goods. We would suggest that the LDF Core Strategy refers to a floorspace limit of 14,000 sq.m. gross, including both convenience and comparison goods, which includes the LCP Hoardings site. The amount of floorspace represented by comparison goods is 13,000 sq.m. gross. Any potential to accommodate further bulky goods development in the Lichfield catchment area in Burntwood would be additional to this floorspace capacity but we have not specifically allowed for it in terms of the floorspace limits.

3.45 The proposed LDF floorspace limit for Burntwood up to 2028 is summarised below (figures are rounded).

| Floorspace (sq.m. gross) | Convenience | Comparison | Total |
|---|---|---|---|
| LCP scheme | - | 9,000 | 9,000 |
| Morrisons extension | - | 1,000 | 1,000 |
| Aldi | 1,000 | - | 1,000 |
| additional capacity | - | 3,000 | 3,000 |
| Total | 1,000 | 13,000 | 14,000 |

3.46 The scale of development we have proposed in Burntwood, and the corresponding floorspace limit, reflect local needs. Burntwood would not change its status in the retail hierarchy. It would not become a strategic centre but it would have an enhanced role as a town centre, better serving the local needs of residents of Burntwood and the surrounding area.

3.47 Representations on the Core Strategy have been made by Walsall and Cannock Chase Councils. Walsall Council have expressed concern about the scale of comparison goods floorspace proposed in Burntwood in relation to local needs. They have referred to the effect of the economic recession on retail expenditure growth and the possible impact of additional retail development in Burntwood on nearby centres such as Brownhills and Aldridge. The implications of lower expenditure growth have been considered in the current report by using the most up-to-date national expenditure forecasts which are based on economic prospects.

3.48 Cannock Chase Council have commented that any expansion in retail provision in Burntwood should only be to meet identified local needs and not impact on the retail role of centres in Cannock Chase District. They are concerned that the level of retail provision proposed must demonstrate no adverse effects on Cannock town centre, Hawks Green district centre and Norton Canes local centre.

3.49 In relation to the concerns expressed about retail impact, the potential impact of the scale of retail development proposed in Burntwood on centres in Walsall and Cannock Chase Districts is assessed in Section 6 of this report. However, it should be emphasised at this point that the capacity for additional retail floorspace we have identified in Burntwood uses very cautious assumptions about future increases in the market share of spending in Burntwood by residents of the Burntwood secondary catchment area which includes parts of Walsall and Cannock Chase Districts. In convenience goods no increase is assumed in the existing market share of 5%. In comparison goods it is assumed that the market share of spending drawn to Burntwood will increase from 2% at present to 4% in the future because of the LCP Hoardings scheme. Any longer term potential for additional comparison goods floorspace in Burntwood arises only from expenditure growth, not from any further increase in Burntwood's market share from the secondary catchment area.

3.50 Finally it should be noted that the quantitative need assessments we have carried out relate to the catchment areas of Lichfield and Burntwood which are quite extensive. The assessment for convenience goods is concerned principally with foodstore developments that may serve a wide catchment area. However, there may be more local needs for smaller supermarket developments that serve a localised catchment, for instance in residential areas of Burntwood. The overall lack of capacity for additional foodstore development does not imply that there is no need for any new small supermarkets. There may be a qualitative need for a small supermarket in a residential area where there is a local deficiency in shopping provision. Proposals for new retail development that meets local needs should be assessed according to the scale of development, taking account of the sequential approach. Section 7 of this report proposes floorspace thresholds to be used by the Council in deciding whether a planning application for new retail development should be subject to a retail assessment.

## 4. LICHFIELD CITY CENTRE

### Core Strategy

4.1 The Core Strategy states:

*"9.21 Lichfield is identified as the District's strategic centre and sets out the amount of retail floorspace that should be developed in the centre until 2026. It is the largest of the centres in the District, the most accessible by public transport and therefore the most appropriate location for new major retail, office, leisure and tourism uses. Any development within Lichfield City centre should protect and enhance the important historic character of the city. The main focus for development within the city centre, Friarsgate, will provide a retail-led mixed use scheme, including new leisure and tourism facilities, which will reinforce and build upon the city's existing strengths, whilst providing a development of a size which will enhance Lichfield City's status as a strategic centre.*

*9.22 Other, smaller, retail development within the town centre boundary will also be supported up to the floorspace limits to give a diverse, varied and vibrant shopping environment. Office development should also be focused within Lichfield City, providing high quality accommodation to encourage inward investment and support and enhance the existing business community within the city. Arts, tourism, leisure and cultural facilities within the city centre are also encouraged to provide for the needs of both residents and tourists. Lichfield City's night time economy is also significant and should be carefully managed with safe and varied activities encouraged. Opportunities for public realm enhancements and creation of vibrant and active public spaces should be maximised. Enhanced accessibility to sustainable transport and improved traffic management will ensure that the city attracts residents and visitors alike."*

### Review of Existing Shopping Provision

4.2 Existing shopping provision in Lichfield was assessed in detail in our Background Retail Review report for the Council in April 2007. The report shows that Lichfield city centre is the largest centre in the District with a total shopping floorspace of 30,800 sq.m. gross. The main shopping areas are in Bore Street, Market Street and the Market Square, together with the Three Spires Centre on Bakers Lane.

4.3 The survey of existing provision in Lichfield city centre was updated in October 2011. The table below compares the composition of retail and service uses in the centre in 2007 and 2011, and compares the existing composition of uses with UK averages from Experian Goad.

| Lichfield | No. of Units 2007 | No. of Units 2011 | Percentage 2011 | UK percent |
|---|---|---|---|---|
| Convenience goods | 16 | 17 | 6% | 9% |
| Comparison goods | 145 | 131 | 45% | 33% |
| All Retail Units | 161 | 148 | 51% | 42% |
| | | | | |
| Service uses | 117 | 121 | 42% | 46% |
| Vacant | 14 | 21 | 7% | 12% |
| | | | | |
| Total Retail & Services | 292 | 290 | 100% | 100% |

4.4 The total number of units in the city centre has remained fairly constant between 2007 and 2011 but there has been a small reduction in the number of shops and a small increase in both service uses and vacancies. Compared to the national average, Lichfield has a relatively low proportion of convenience goods shops and a high proportion of comparison goods shops. The overall proportion of shops is above the national average. The proportion of service uses is slightly below average. Despite an increase in the number of vacant units, the current vacancy rate is well below the UK average.

4.5 Convenience goods shopping provision is limited to the Marks and Spencer Simply Food supermarket and an Iceland store, together with a small number of grocers, bakers, butchers and newsagents. However, on the eastern edge of the city centre there is a new Tesco Extra foodstore and an Aldi discount foodstore. Elsewhere in Lichfield there is a Co-op supermarket at Boley Park, a Morrisons foodstore at Beacon Street, a Waitrose foodstore at Walsall Road and a new Lidl discount store on Eastern Avenue. A new local centre has been developed at Fradley.

4.6 In comparison goods the largest retail units are occupied by national multiples including Wilkinsons, Argos, Boots, WH Smith, Burtons and Superdrug, supplemented by a larger number of independent outlets. There are no department stores at present. The former TJ Hughes variety store in the Three Spires Centre closed recently. The largest categories of comparison goods shops are in clothes, chemists/opticians, electrical/phones, books/crafts, gifts/glass, sports/toys and furniture/carpets.

4.7 Outside the city centre there is only a limited amount of retail warehouse floorspace, with a Magnet showroom on Birmingham Road. Lichfield lacks the type of retail warehouse provision that can be found on the retail parks nearby in Tamworth, Cannock, Walsall and Burton. The Lichfield Retail Park has recently opened at Eastern

Avenue and comprises Wickes, Carpetright, Pets at Home, Bensons Beds and Halfords.

4.8 The major undeveloped retail commitment in Lichfield is the Friarsgate scheme on Birmingham Road, which has not yet started. This a redevelopment scheme for mixed uses including retail, restaurants, cinema, leisure, office, residential and other uses plus car parking and a new bus station. Further details are given later in this Section.

**Vitality and Viability of Lichfield city centre**

4.9 England & Lyle carried out a health check appraisal of Lichfield city centre in March 2007 and again in February 2009 to assess its vitality and viability using a range of indicators and factors. The appraisal has been updated in October 2010.

4.10 The health check appraisal uses the Town Centre Health Check Indicators listed in Annex D of PPS4. Each Indicator is sub-divided into a number of more detailed 'Factors' which are given a score from 1 to 5 according to our assessment of their rating on a 5 point scale. 1=very poor; 2=poor; 3=fair; 4=good; and 5=very good. The Indicators and Factors have been updated from the original PPS6 checklist to correspond with the new PPS4 guidance. The appraisal includes a total of 36 factors. An average score is produced for all the Factors present and this gives an overall index of the health of the centre. The Health Check Appraisal Sheet for Lichfield is included in Appendix 1 of this report.

***Diversity of Main Town Centre Uses***

4.11 Lichfield city centre has a total of 148 retail units. The number and type of shops and the amount of shopping floorspace are rated as good. The supply of offices such as banks, building societies and business premises, is fair. We recorded 18 financial and professional offices in the centre. Leisure, cultural and entertainment activities are rated as good due to the presence of the Cathedral, museums, heritage buildings such as the Guildhall, the Lichfield Heritage Centre, the Garrick Theatre and the Lichfield campus of Staffordshire University. Friary Grange and King Edward VI Leisure Centres are located outside the city centre. The provision of pubs, cafes, restaurants and hotels are all rated as good. Hotels include the 3 star George Hotel and Cathedral Lodge Hotel.

***Floorspace outside the Centre and Capacity for Growth or Change***

4.12 The amount of retail, leisure and office floorspace outside the city centre is rated as good because, although there are edge-of-centre Tesco and Aldi stores, out-of-centre Morrisons, Waitrose and Lidl stores, and the new Lichfield Retail Park, Lichfield does not have a large amount of out-of-centre shopping which could compete with the city centre. There are significant opportunities for the centre to expand or consolidate (as shown later in this Section) and the capacity for growth or change is rated as good. .

Capacity for growth in the centre is constrained physically to the north by the historic Cathedral and its surroundings. However, opportunities exist close to the southern edge of the city centre, notably around Birmingham Road where the large Friarsgate redevelopment scheme has been approved. The entirety of the existing town centre shopping provision is set within the city centre Conservation Area. Other opportunities for growth within the centre have already been realised through the development of the Three Spires Centre. However, there may be further potential for redevelopment of car park sites.



***Retailer Representation***

4.13 Lichfield has 25 non-food multiples, a fifth of all comparison goods shops, which is a reasonable representation for a centre of its size. Multiples include Burtons, Boots, WH Smith, Superdrug, Argos, Wilkinsons, Dorothy Perkins and Poundstretcher, but there are no department stores. The variety of specialist and independent shops is good, with a particularly notable representation in Dam Street near to the Cathedral. Independent retailers include jewellers, ladies clothes, bridal gowns, children's clothing, florists, butchers, furniture and pets. General Markets take place on Tuesday, Friday and Saturday each week. A Farmers' Market is held on the first Thursday of the month (except January) and an Antiques Market on the third Thursday of each month. It is evident that a wide choice of existing, good quality street markets are regularly available in the city centre, with access to local produce, which we rate as good.

4.14 The availability of food shopping is also rated as good. There are only two supermarkets in the city centre (M&S Simply Food and Iceland) but there are edge-of-centre Tesco and Aldi stores. Evidence of recent investment by retailers is rated as good, notably in the Three Spires Centre and the Tesco Extra store. Retailer demand, according to FOCUS data, is fair. There are currently 21 retailer requirements but this number has declined since 2007. The Friarsgate scheme will provide the opportunity for new retailers to locate in the centre, including a Debenhams department store. The lack of charity shops is good, with only 6 charity shops in the centre, mostly in Market Street.


***Vacant Properties***

4.15 Our inspection of the city centre in October 2011 found 21 vacant properties, an increase over the total of 10 recorded in February 2009. However, the vacancy rate is currently just 7% of all retail and commercial properties, compared with the national average of 12%, and it is rated as good. There is a concentration of vacant units in Tamworth Street and the Three Spires Centre. The amount of vacant floorspace is low and is also rated as good. Vacancies comprise mostly small units but the large former TJ Hughes unit is currently vacant.

***Commercial Performance***

4.16 Zone A rental levels in Lichfield are below the regional average. Rental values are currently about £90 per sq.ft. and they have generally increased since 2001. But they are below rentals in the neighbouring towns of Walsall and Burton, and this factor is rated as fair. The latest information on shopping centre yield in Lichfield for 2008 shows a yield of 6.25, compared to 6.0 in Walsall, 6.75 in Burton-on-Trent and 7.0 in Tamworth. Overall this factor is rated as good. There is no published information on changes in land values in Lichfield and this factor is not rated. Another factor in commercial performance is the length of time key sites have remained undeveloped. The Friarsgate scheme has not yet started because of the current economic climate and its delay must be interpreted as an indicator of some weakness in economic performance. This factor is rated as fair.

***Pedestrian Flows***

4.17 The volume of pedestrian flow (footfall) is rated as generally good. The highest pedestrian flows are in and around the Three Spires Centre, the central Market Place, and in the pedestrianised section of Bore Street. They are lowest at the south end of Market Street, in Bird Street and in Tamworth Street. The centre has benefited from the improvements to the pedestrian environment in Bore Street, Market Place and Breadmarket Street

***Accessibility***

4.18 Lichfield scores well on factors of accessibility. Car parking in Lichfield is rated as good, with a range of car park sizes and types, all well distributed around the centre. Shoppers' car parks are available at Bird Street, Cross Keys, Gresley Row, Backcester Lane and the Birmingham Road multi-storey car park. The frequency and quality of public transport and range of places served by bus are rated as good. The bus station is conveniently located on Birmingham Road, 100 metres from the Three Spires Centre, and opposite Lichfield City railway station. Local bus services offer good quality regular services (every 30 minutes in most cases) to Alrewas, Burntwood, Burton, Cannock, Fradley, Handsacre, Hednesford, Rugeley, Stafford, Tamworth and Whittington.

4.19 Ease of movement for pedestrians, cyclists and the disabled is good. There is disabled parking in the pedestrianised part of Tamworth Street and Bore Street, with a shopmobility service available from the bus station. Ease of access to the main attractions in the centre is also good. There is good signage in the city centre for all the main facilities – notably at Bakers Lane/Tamworth Street, outside the Guildhall, outside the Garrick Theatre, in Dam Street and Bird Street, and in the Bird Street car park. There are good information boards at several locations in the city centre.

***Customer Views and Behaviour***

4.20 No information is available in relation to customer views and behaviour for Lichfield City Centre. Although a household survey was undertaken in connection with the 2004 Retail Study, it does not refer specifically to customers' satisfaction with the city centre or the need for improvements. However, the household survey does show leakage from Lichfield District and we interpret this as an indicator of some lack of satisfaction with the city centre and the need for some improvements. Customer views and behaviour are rated as fair. There is a good opportunity for linked trips between the new Tesco supermarket and the city centre and we have observed shoppers making linked trips.

***Safety and Security***

4.21 Lichfield city centre does not appear to have significant problems of safety and security. A CCTV system has been installed and good lighting has been introduced. CCTV is available in the main shopping area of the Three Spires Centre. The feeling of security is rated as good. The safety of the evening and night time economy is also good.


***Environmental Quality***

4.22 To assess environmental quality, as part of our survey of the city centre in 2007 we noted the physical appearance of all retail and commercial properties, using a 5-point scale from 1 for very poor to 5 for very good. The overall score obtained is 3.3 which is better than average. More than half of all properties were rated as fair and most of the others were rated as good rather than poor. There is a lack of environmental problems such as air pollution, noise and litter. Overall cleanliness is good. The general pedestrian environment and the quality of open spaces/landscaping are rated as very good. This represents an improved score on the 2007 appraisal because of the completion of the major environmental improvements in the centre. Environmental quality is particularly good in the Market Place, Bore Street, the northern end of Dam Street and Bird Street adjacent to the Friary site. Beacon Park, Minster Pool and Friary Gardens are particularly attractive. The pedestrianised streets are attractive but there is some conflict between pedestrians and vehicles using Bore Street. Public conveniences tend to be located outside the main shopping area – at Bird Street car park, Swan Road/Beacon Street, Friary Outer car park and the bus station. The availability and condition of toilets is rated as fair.

***Overall Vitality and Viability***

4.23 The overall vitality and viability index obtained on the health check appraisal for Lichfield is 3.8 which is a relatively high level of vitality and viability. Lichfield's main strengths are its diversity of shopping and service provision; the relatively small amount of floorspace outside the centre; the capacity for growth and change in the centre; generally good retailer representation; low vacancy rate; high volume of pedestrian flow; good car parking and public transport; safety and security; and good environmental quality including an excellent pedestrian environment and quality of open spaces and landscaping. Lichfield has no identified weaknesses. Unusually for this type of appraisal, no single factor has been rated as poor.

4.24 The overall vitality and viability index increased from 3.6 in March 2007 to 3.7 in February 2009 and has increased again to 3.8 in October 2011. The vitality and viability of the centre is strong and it will improve even further when the Friarsgate redevelopment scheme takes place.

**Sites for Future Development**

4.25 The Core Strategy document 'Shaping our District' (November 2010) states that substantial retail development of up to 35,000 sq. metres gross floorspace will be focused within Lichfield city centre. In Section 3 of this report our assessment is that in the period up to 2028 the Core Strategy should refer to a floorspace limit of 36,000 sq.m. gross to meet city centre shopping needs, of which 31,000 sq.m. gross is for comparison goods. This floorspace limit includes an additional 6,000 sq.m. gross of retail floorspace (excluding bulky goods) over and above that committed at Friarsgate in the LDF period to 2028, which the LDF should seek to accommodate in the city centre.

4.26 Lichfield is defined as a "large town centre" in the retail hierarchy. The key focus for the Core Strategy policies on town centres is to support their continuing vitality and viability by seeking to accommodate an appropriate level of growth and encourage a wide mix of town centre uses. As well as the quantitative need we have identified, there is also a qualitative need in Lichfield to expand the range and choice of shopping and other services to meet the needs of residents across the catchment area. Although Lichfield has a high level of vitality and viability, it still lacks a good range of multiples (including a department store) and it would benefit from an improvement in the quality of the retail offer.

4.27 Most of the identified need for improved shopping in Lichfield will be met be the Friarsgate scheme, a major redevelopment scheme that has been approved in the Birmingham Road area of Lichfield on the site of the existing Birmingham Road car park, police station and bus station. This 3.3 hectare site has planning permission for a mixed use development. The Friarsgate scheme comprises retail (Class A1), restaurant and bars (Class A3/A4), cinema and other leisure space (Class D2), office (Class A2/B1, residential units (Class C3), a new police station, public squares, a replacement public transport interchange, car parking and associated landscaping, servicing and access.

4.28 The latest design changes to the Friarsgate scheme gained planning permission in May 2011. Changes include a reduction in the number of larger retail units to accommodate more stores. The scheme is now a joint venture between S. Harrison Developments Ltd and Development Securities plc. The developer is seeking to make some amendments to the scheme. Work is expected to start in 2012.

4.29 The Class A1 retail element of the scheme measures approximately 22,000 square metres in total (controlled by planning condition), and comprises a large format department store (Debenhams) providing 6,000 sq.m. of floorspace and 35 smaller retails units of varying sizes. The development will extend the city centre and link into the Three Spires Centre.

4.30 Although the Friarsgate scheme will meet most of the future shopping needs of Lichfield in the LDF period, there are other potential opportunities for further retail development in Lichfield city centre. In the report 'Evidence on Retail Matters for the LDF Core Strategy: 2009 Update' a sequential site assessment was carried out of sites in the city centre. Sites were evaluated in terms of their availability, suitability and viability. We have reviewed these sites in the light of the guidance in PPS4 on the sequential approach to site selection. Our conclusions are that two sites offer the best potential in Lichfield city centre for further retail development in the long term, in addition to the Friarsgate scheme, and they should be allocated accordingly.

- Bird Street car park site and
- Backcester Lane area

4.31 The <u>Bird Street site</u> lies partly within and partly on the edge of the Primary Retail Area of Lichfield city centre defined on the Local Plan Proposals Map. The Bird Street car park was subject to a development brief prepared by the Council in December 2008. It covers approximately 0.8 hectares in area, and is situated on the northern edge of the primary retail area. The site is currently utilised as a surface car park, with pedestrian links to Bird Street, Market Street and Dam Street, via the adjacent Minster Pool park and walkway. The site includes some Council-owned shop units on the northern side of Market Street. It is well related to the existing primary retail frontage along Bird Street and Market Street. The development brief envisages a mixed use redevelopment scheme including retail, leisure, hotel, offices, car parking, residential, community facilities and open space. Retail uses would link in with Market Street. It is an opportunity for longer term redevelopment in Lichfield. Development would not commence before the completion of the Friarsgate project.

4.32 We have identified a capacity in Lichfield city centre for a further 6,000 sq.m. gross floorspace by 2028, in addition to the Friarsgate scheme. Most of this capacity could be accommodated in the Bird Street area. Some of the capacity could also possibly be met in the Backcester Lane area on the eastern edge of the city centre. It is defined on the Local Plan Proposals Map as partly within the Primary Retail Area and partly within the Secondary Retail Area. Land at Backcester Lane is allocated as a City Centre Redevelopment site (Local Plan Policy L15) currently provides car parking, adjacent to the Three Spires Centre. The site comprises 1.0 hectares and is segmented into three parts by Gresley Row and Backcester Lane and car parking is provided on different levels. The site is only likely to become available in the longer term but part of it has potential for retail development adjacent to the Three Spires Centre.

4.33 Our advice is that the Bird Street car park site and land at Backcester Lane should be allocated for future retail development in the LDF, in addition to the site of the Friarsgate scheme. All three sites should be included within the city centre boundary but at present all of these areas should be regarded as falling outside the primary shopping area. It is not necessary to allocate any further sites for retail development within or on the edge of the city centre.

4.34 The locations of the development opportunity sites in Lichfield are shown on the map in Figure 1.

## 5. BURNTWOOD TOWN CENTRE

### Core Strategy

5.1 The Core Strategy states:
*"9.23 Burntwood town centre is currently only providing a small percentage of the retail floorspace that is required to meet the needs of the local population. It is proposed that the town centre is further developed to meet local needs, in accordance with the previously described floorspace limits and within the town centre boundary. The existing town centre, based around Sankey's Corner, will be protected and enhanced, with redevelopment and/or visual improvements encouraged to help benefit the town centre as a whole. Land for development should include the committed 'Blue Hoardings' scheme and the Morrison's store extension. Any further development should take place on the Olaf Johnson site, where it is considered that a mix of uses (including cultural, leisure and residential uses), with safe and vibrant connections to the existing town centre, would be appropriate. Office provision should be directed to sites within the town centre boundary to give further employment opportunities. With a new town centre, accessibility by foot to and around the centre itself will be improved. Proposals will be encouraged to promote and include provision on sustainable forms of travel."*

### Review of Existing Shopping Provision

5.2 Existing shopping provision in Burntwood was assessed in detail in our Background Retail Review report for the Council in April 2007. Burntwood town centre comprises a grouping of shops at Sankeys Corner and the 'Burntwood Town Shopping Centre' and a Morrisons superstore which is physically separated from the other shops in the centre. The survey of existing provision in Burntwood town centre was updated in October 2011. The table below compares the composition of retail and service uses in the centre in 2007 and 2011, and compares the existing composition of uses with UK averages from Experian Goad.

| Burntwood | No. of Units 2007 | No. of Units 2011 | Percentage 2011 | UK percent |
|---|---|---|---|---|
| Convenience goods | 7 | 7 | 12% | 9% |
| Comparison goods | 16 | 15 | 25% | 33% |
| All Retail Units | 23 | 22 | 37% | 42% |
| | | | | |
| Service uses | 32 | 31 | 53% | 46% |
| Vacant | 1 | 6 | 10% | 12% |
| | | | | |
| Total Retail & Services | 56 | 59 | 100% | 100% |

5.3 The total number of units in the town centre has increased slightly between 2007 and 2011. The number of shops and services has remained fairly constant but there has been an increase in vacancies. Burntwood has a relatively high proportion of convenience goods shops and a relatively low proportion of comparison goods shops, which is to be expected in a smaller centre. The proportion of service uses is above average. Despite an increase in the number of vacant units, the current vacancy rate is just below the UK average.

5.4 The largest retail unit in Burntwood is the Morrisons superstore. There are a further 6 convenience goods shops including a Tesco Express supermarket and other smaller units. The remainder of the shops comprised a total of 15 mostly small comparison goods units and a wide range of service uses.

5.5 Total shopping floorspace in Burntwood in our 2007 survey was 6,960 sq.m. gross and 4,670 sq.m. net, comprising 3,081 sq.m. net in convenience goods and 1,589 sq.m. net in comparison goods. Since 2007 Morrisons has completed an extension to its store of 1,874 sq.m. gross, 801 sq.m. net. Its sales area has increased by 267 sq.m. net in convenience goods and 534 sq.m. net in comparison goods.

5.6 There is an outstanding commitment in Burntwood for retail development by London & Cambridge Properties (LCP) on the edge-of-centre Hoardings site to the west of Morrisons. Planning permission was granted in 2011 for an Aldi discount foodstore of 990 sq.m. net floorspace on an edge-of-centre site to the east of Sankey's Corner. Further details of these developments are given later.

**Vitality and Viability of Burntwood town centre**

5.7 England & Lyle carried out health check appraisals of Burntwood town centre in March 2007 and again in February 2009 to assess its vitality and viability using a range of indicators and factors. The appraisal has been updated in October 2011.

5.8 As in Lichfield we have carried out a health check appraisal using the Town Centre Health Check Indicators listed in Annex D of PPS4. Each Indicator is sub-divided into a number of more detailed 'Factors' which are given a score from 1 to 5 according to our assessment of their rating on a 5 point scale. The Indicators and Factors have been updated from the original PPS6 checklist to correspond with the new PPS4 guidance. The appraisal includes a total of 36 factors. An average score is produced for all the Factors present and this gives an overall index of the health of the centre. The Health Check Appraisal Sheet for Burntwood is included in Appendix 2 of this report. Because Burntwood is a relatively small centre, the appraisal is based just on those factors that are present.

*Diversity of Main Town Centre Uses*

5.9 Burntwood has the character of a suburban district centre. It has a total of 22 retail units and 31 service units. The town centre is rated as fair in terms of the number and type of shops, the amount of shopping floorspace and the supply of offices. Services are dominated by hairdressers and takeaway food outlets. Leisure, cultural and entertainment activities are also rated as fair. There is a library and a health centre. Although entertainment facilities are limited in the centre, there is a sports and leisure complex based around Burntwood Leisure Centre, on the edge of the town centre. The provision of pubs, cafes and restaurants is reasonable for a centre of this size. There are no hotels in the town centre and so this factor is not rated.

*Floorspace outside the Centre and Capacity for Growth or Change*

5.10 There is very little retail, leisure and office floorspace in Burntwood outside the town centre, other than the designated local centres, and so this factor is rated as good. There are significant opportunities for the centre to expand or consolidate (as shown later in this Section) and the capacity for growth or change is rated as very good.

*Retailer Representation*

5.11 Burntwood has only 3 non-food multiples, of which 2 are pharmacies. The former Peacocks unit which was part of the Somerfield store, has been taken over by Tesco. The representation of multiples is poor for a town of this size. The variety of specialist and independent shops is rated as fair. Independents include cards/gifts, carpets, a butcher, clothes, pets and equestrian supplies. There is no street market in Burntwood and this factor is not rated. The availability of food shopping is good because of the presence of the Morrisons and Tesco supermarkets and a variety of other food shops.


5.12 Evidence of recent investment by retailers, principally the Tesco development and the Morrisons extension, is rated as good. Information on retailer demand from the FOCUS database shows there is only one retailer requirement in Burntwood, a reduction from 3 in 2009, and this factor is rated as poor. Only one charity shop exists in the town centre, which we rate as good.

***Vacant Properties***

5.13 There are 6 vacant units in Burntwood town centre, including a vacant former public house in the Burntwood Town Shopping Centre. Vacancies have increased in the last year but the vacancy rate is just below the national average. Therefore we rate the vacancy rate and the amount of vacant floorspace as fair.

***Commercial Performance***

5.14 No information is available on Zone A rental values, shopping centre yield or land values in Burntwood town centre because of the size of the centre. These factors are not rated. Another factor in the commercial performance of the centre is the length of time that key sites have remained undeveloped. The Hoardings site and the Olaf Johnson site are key sites and have remained undeveloped for several years. This factor is rated as poor.

***Pedestrian Flows***

5.15 The volume of pedestrian flow in the town centre at the time of our earlier surveys and in the latest survey is judged to be fair. Pedestrian flows are strongest in and around the main Burntwood Town Shopping Centre complex, with limited flows between the main part of the town centre at Sankeys Corner and Morrisons to the south.

***Accessibility***

5.16 A good choice of car parking is available to the rear of the Burntwood Town Shopping Centre, to the rear of Tesco and at the Morrisons store. Morrisons car park is well used and does not have time restrictions. Tesco offers 3 hours free car parking. The frequency and quality of public transport and range of places served by bus are rated as good. There are bus links to Burntwood from Lichfield, Cannock, Brownhills and Walsall. Ease of movement for pedestrians, cyclists and the disabled in Burtwood is fair rather than good because Cannock Road runs through the town centre and tends to act as a barrier to north-south movement. Ease of access to the main attractions in the centre is good.


*Customer Views and Behaviour*

5.17 No information is available on customer views and behaviour in relation to Burntwood town centre. However, the household survey carried out for the Council in the 2004 Retail Study suggested a high leakage of trade from Burntwood to other centres. Satisfaction with the centre and the need for improvements are rated as poor. There are indications that some people make linked trips between Morrisons and the main centre around Sankey's Corner and we rate the extent of linked trips as fair.

*Safety and Security*

5.18 In 2009 we rated the overall feeling of safety and security in Burntwood town centre as good. There are two CCTV cameras in the centre in Cannock Road. This was an improvement over the score in the 2007 appraisal based on a re-consideration of the level of safety and security in the town centre. The feeling of security remains good and the safety of the evening and night time economy is also good.

*Environmental Quality*

5.19 The average score obtained on physical appearance of retail and commercial properties in Burntwood town centre using a 5-point scale is 2.9. More than half of all properties are rated as fair. The centre does not have any significant environmental problems such as air pollution, noise and litter and this is rated as fair. However, the disused garage site next to Tesco and the Olaf Johnson site are both in a poor environmental condition and tend to detract from the character of the centre. The quality of open spaces and landscaping are rated as fair. The availability and condition of public toilets is poor but toilets are available in Morrisons.

***Overall Vitality and Viability***

5.20 The overall vitality and viability index obtained on the health check appraisal for Burntwood is 3.2 which is just above average. Burntwood's main strengths are the lack of floorspace outside the centre; the capacity for growth and change in the centre; the availability of food shopping; evidence of recent investment by retailers; lack of charity shops; availability of car parking; good public transport; and safety and security. Its main weaknesses are in terms of the lack of multiples; low retailer demand; the length of time key sites have remained undeveloped; low satisfaction and the need for improvements in the centre; and some problems in environmental quality.

5.21 The vitality and viability index for Burntwood increased from 3.2 in March 2007 to 3.3 in February 2009 but it has decreased again to 3.2 over the last two years because of the increase in vacancy rate and vacant floorspace. Burntwood is a centre in need of improvement. It needs to have an improved retail offer and a consolidation of its retail provision to increase the critical mass of shopping in the centre.

**Sites for Future Development**

5.22 The Core Strategy document 'Shaping our District' (November 2010) states that in Burntwood there should be a limit on new retail development of 16,000 sq. metres gross floorspace, of which 13,000 sq. metres gross will be comparison goods. In Section 3 of this report our assessment is that in the period up to 2028 the floorspace limit for Burntwood town centre in the Core Strategy should be 14,000 sq.m. gross, of which 13,000 sq.m. gross is for comparison goods (excluding any potential for bulky goods development).

5.23 A detailed assessment has been made of Burntwood town centre. In addition to the health check, we have assessed the potential for further development in addition to the approved LCP scheme on the Hoardings site.

5.24 There is a qualitative as well as a quantitative need for further retail development in Burntwood. In PPS4 terms there is an inadequate provision and distribution of shopping and other services in Burntwood to serve the needs of the community. There are no significant deficiencies in the provision of local convenience shopping and other facilities which serve people's day-to-day needs because of the presence of Morrisons, Tesco and smaller specialist food shops. However, taking shopping provision overall, shoppers in Burntwood would benefit from increased choice and competition and a better retail mix. There are particular deficiencies in Burntwood in the lack of multiples, low retailer demand, the amount of undeveloped land and the need for physical improvements in the centre.

5.25 We have assessed the capacity of Burntwood centre to accommodate new retail development, taking account of its role in the hierarchy of centres as a 'smaller town centre'. The adopted Local Plan Proposals Map defines an extensive area in Burntwood town centre for "new shopping development". It is not a town centre boundary but it includes the existing town centre plus the Olaf Johnson site and the Hoardings site.

5.26 In PPS4 terms, the 'primary shopping area' is the defined area where retail development is concentrated, generally comprising the primary and secondary frontages which are contiguous and closely related to the primary shopping frontage. A realistic definition of the primary shopping area in Burntwood, based on primary and secondary shopping frontages, shows that the existing centre is very compact. It is based around the crossroads at Sankey's Corner comprising shops and service uses on the south side of Cannock Road and Bridge Cross Road, the west side of Rugeley Road and in the Burntwood Town Shopping Centre precinct. Morrisons and its car park could also reasonably be regarded as being part of the primary shopping area.

5.27 Our 'on the ground' inspection shows that there are no possible sites for development within the existing primary shopping area other than land used for car parking at Morrisons and Tesco. The only possible sites that could accommodate further retail development in Burntwood are on the edge of the primary shopping area, as follows:

- the Hoardings site west of Morrisons
- former Bridge Cross Garage site, Cannock Road
- Olaf Johnson site to the west of Tesco
- Bridge Cross Working Mens Club site, east of Sankey's Corner

5.28 <u>The Hoardings site</u> occupies 6.5 hectares and has an extant planning consent for retail development for London & Cambridge Properties (LCP) granted in March 2007. A planning application was made by LCP in March 2010 to extend the time limit for implementation. The approved scheme comprises 16 retail units with a total floorspace of 9,406 sq.m. GIA. In PPS4 terms the Hoardings site is currently a site on the edge of the centre capable of accommodating larger format retail developments. However, we propose that the site should be included within a new town centre boundary for Burntwood.

5.29 <u>The former Bridge Cross Garage site</u> is a cleared site located to the west of Tesco on the south side of Cannock Road, with a site area of 0.3 hectares. It has a good frontage to Cannock Road but it would be capable of accommodating only a small scale retail development. There is potential for the site to form part of a larger development opportunity area combined with the adjacent Olaf Johnson site.

5.30 <u>The Olaf Johnson site</u> between Tesco and Morrisons is a cleared site of 2.3 hectares. Planning permission was granted for retail development on the site in 2001 but this permission has now lapsed. There are currently no firm proposals for the site. However, it is well located in relation to the town centre and it would form a logical extension to the town centre. We recommend that the Olaf Johnson site and the adjacent former Bridge Cross Garage site should be included within the town centre boundary of Burntwood. However, until there are firm proposals for these sites, they should not be included within the primary shopping area.

5.31 The Bridge Cross Working Mens Club site and its associated grounds is a triangular site east of Sankey's Corner, occupying 0.6 hectares. Planning permission has been granted for an Aldi discount foodstore of 990 sq.m. net on this site. It is therefore a commitment in planning terms.

5.32 In our need assessment for Burntwood we have identified a potential floorspace capacity of up to 3,000 sq.m. gross, in addition to the LCP scheme on the Hoardings site. This capacity could be accommodated on the Olaf Johnson site (including the adjacent former garage site). The Olaf Johnson site has previously had consent for retail development of about 6,000 sq.m. gross. The capacity is for comparison goods but there may also be potential for additional convenience goods retail development on the Olaf Johnson site if it can be justified that a new supermarket development on that site would be supported by an increased retention level in convenience goods, and if the impact of a supermarket development is acceptable.

5.33 The scale of development that could be accommodated in Burntwood on the Hoardings site and the Olaf Johnson site is appropriate to the role and function of the centre within the hierarchy and the catchment served.

5.34 Applying the sequential approach to site selection in Burntwood, we consider that the Olaf Johnson site and Bridge Cross Garage site are sequentially preferable to the Hoardings site. They are better related to the existing retail core around Sankey's Corner. The pedestrian linkages between these sites and existing shops are good or could be improved and development in this location would create an opportunity for linked trips. The Hoardings site is not well connected to the centre for pedestrians, though it would enable linked trips to be made to Morrisons.

5.35 We would advise the Council that the Hoardings site, the Olaf Johnson site and the Bridge Cross Garage site, and the Aldi development site should be identified as development opportunities in the LDF. In making this recommendation we have taken account of the advice in PPS4 that the Council should review existing site allocations so that they are not carried forward from one version of the development plan to the next without evidence of need and a reasonable prospect of their take up during the plan period.

5.36 All the development opportunity sites lie within the area for "new shopping development" defined on the Local Plan Proposals Map. We have reviewed the need for retail development in Burntwood and our recommendation is that these areas remain appropriate for new retail development. The LCP Hoardings site, Aldi development site, and Olaf Johnson and Bridge Cross Garage sites should be included within a new town centre boundary for Burntwood and they should be regarded as development opportunities within the town centre boundary. However, at this stage they do not form part of the primary shopping area of Burntwood town centre.

5.37 The locations of the development opportunity sites in Burntwood are shown on the map in Figure 2.

## 6. IMPACT ASSESSMENTS

6.1 PPS4 advises that the Council should assess the impact of proposed sites on existing centres:

- taking into account the impact considerations set out in Policy EC16, ensuring that any proposed edge-of-centre or out-of-centre sites would not have an unacceptable impact on centres within the catchment of the potential development
- ensuring that proposed sites in a centre, which would substantially increase the attraction of that centre and could have an impact on other centres, are assessed for their impact on those other centres, and
- ensuring that the level of detail of any assessment of impacts is proportionate to the scale, nature and detail of the proposed development.

6.2 The Council should also consider the degree to which other considerations such as any physical regeneration benefits of developing on previously-developed sites, employment opportunities, increased investment in an area or social inclusion, may be material to the choice of appropriate locations for development. These are factors relevant to PPS4 Policy EC10 as well as Policy EC16.

6.3 In this Section we carry out impact assessments of the committed and potential future retail developments in Lichfield and Burntwood based on the guidance in PPS4.

**Retail Impact of New Retail Developments in Lichfield**

6.4 As part of the evidence base we have assessed the impact of the Friarsgate development scheme in Lichfield and its implications for the vitality and viability of other centres in the Lichfield catchment area. We have also assessed the cumulative impact of the Friarsgate scheme and a potential redevelopment of the Bird Street car park and Backcester Lane sites in Lichfield in the longer term.

6.5 The retail impact tables for Lichfield are included in Appendix 8 of this report, as follows:
Appendix 8A – Proposals for Friarsgate Development, Birmingham Road, Lichfield, 2016
Appendix 8B – Proposals for longer term retail development in Lichfield including further comparison goods development on other development sites, 2028

6.6 Appendix 8A is a retail impact assessment of the Friarsgate scheme for comparison goods only. The design year for the impact assessment is 2016. We estimate that 15% of the trade draw to the Friarsgate scheme would be from Lichfield city centre, 3% from Burntwood, 1% from Brownhills and 1% from other centres and stores in the catchment area – a total of 20% from the Lichfield catchment area. In the capacity analysis we have estimated that 65% of the turnover of the Friarsgate scheme would be from clawback of leakage and this assumption is maintained for consistency. The remaining 15% of trade would be from inflow of trade from outside the catchment area.

6.7 The predicted trade diversions in comparison goods are 8.0% from Lichfield city centre, 4.3% from Burntwood (Sankey's Corner), 2.4% from Brownhills and 3.3% from other centres and stores in the study area. The overall trade diversion in the catchment area is 3.5%. These are not significant levels of impact in comparison goods. The predicted trade diversion from existing shops in Lichfield city centre would be an initial impact when the scheme opens and we would expect the impact to diminish over time. The predicted impacts arising from clawback from outside the catchment area are in the order of 3% in Walsall, Cannock and Tamworth, and less than 1% in Stafford and Burton-on-Trent.

6.8 Impact has to be interpreted in the context of the vitality and viability of town centres. Our health check of Lichfield city centre in Section 4 shows that the centre has a high level of vitality and viability. The vitality and viability index obtained on the health check appraisal for Lichfield is 3.8 which is well above average. In the context of the health of the city centre, the level of impact on comparison goods trade is not significant. As a result of the Friarsgate scheme the total comparison goods turnover of Lichfield city centre in 2016 would increase by £51m or 45%.

6.9 Appendix 8B show the cumulative trading impact of the Friarsgate scheme together with the longer term option of further retail development on the Bird Street car park and Backcester Lane sites in 2028. Again the assessment is for comparison goods only. We have increased the future turnovers of centres and the Friarsgate scheme to reflect expenditure growth in the catchment area and continued growth in sales productivity in external centres between 2011 and 2028.

6.10 Our need assessment in Appendix 4C identifies a capacity for £50.3m of additional comparison goods shopping in Lichfield in 2028. Subtracting the capacity for bulky goods (Appendix 4D) the net comparison capacity is £34.2m. The additional capacity could be accommodated on the Bird Street car park site and in the Backcester Lane area, as proposed in Section 4. For the purposes of this assessment we have used the same trade draw percentages for the other development sites as for the Friarsgate scheme on the basis that it will also be for comparison goods. On its own the additional development on the other sites would have a minimal impact on any centres. The cumulative impacts in comparison goods are 8.5% from Lichfield city centre, 4.6% from Burntwood (Sankeys Corner), 2.6% from Brownhills and 3.6% from other centres and stores in the catchment area. The overall cumulative trade diversion in the catchment area is 3.8%. The predicted impacts arising from clawback from outside the study area are about 5% in Cannock, 4% in Walsall and Tamworth and less than 1% in Stafford and Burton-on-Trent. Although the predicted cumulative levels of impact are slightly higher than for the Friarsgate scheme on its own, they are not significant impacts. In PPS4 terms there would not be any significant adverse impacts on any centres.

6.11 The vitality and viability of Lichfield city centre is strong and it will improve even further when the Friarsgate scheme takes place. The longer term option of development on the Bird Street car park and Backcester Lane sites will provide further opportunities for retail development to maintain the attraction of the city centre through the LDF period. As a result of the Friarsgate scheme and further development opportunities the total comparison goods turnover of Lichfield city centre in 2028 would increase by £91m or 48%.

6.12 With reference to the PPS4 guidance on impact assessments of sites, we have assessed the sites proposed for allocation for retail development in Lichfield. We have taken note of the fact that the proposals in Lichfield would increase the attraction of the centre and could have an impact on other centres. We have assessed the possible impact on those other centres. Our assessment is proportionate to the scale, nature and detail of the proposed developments. The assessment of the potential developments confirms that, taken cumulatively, the Friarsgate scheme and other development opportunities would not have an unacceptable impact on centres within the catchment of the potential development, as required by PPS4 Policy EC5.

6.13 Policy EC16 refers to the impact of a proposal on in-centre trade/turnover and on trade in the wider area, taking account of current and future consumer expenditure capacity in the catchment area up to five years ahead. Therefore the main concern is with centres within the defined catchment area. There is no requirement to assess the impact on centres outside the catchment area.

6.14 As well as assessing the impact of a proposed development on trade/turnover of centres (which we have assessed above) Policy EC16 requires impact to be assessed in terms of:

- impact on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal
- impact on town centre vitality and viability, including local consumer choice and the range and quality of the comparison and convenience retail offer
- impact of the proposal on allocated sites outside town centres being developed in accordance with the development plan
- if located in or on the edge of a town centre, whether the proposal is of an appropriate scale (in terms of gross floorspace) in relation to the size of the centre and its role in the hierarchy of centres
- any locally important impacts on centres.

6.15 These criteria are particularly relevant to development management rather than plan-making but Policy EC5 also requires them to be taken into account in assessing sites for development. We comment briefly on these factors below.

6.16 There is no reason to suppose that the proposed developments in Lichfield would have any effect on public and private investment in centres in Lichfield District. In fact the proposals for the Friarsgate scheme would represent major and much-needed new investment in Lichfield city centre. It is a city centre scheme and we recommend that the Friarsgate site should be included within the future town centre boundary of Lichfield. The Bird Street and Backcester Lane sites also represent longer term city centre development opportunities and we recommend that they should also be included within the future town centre boundary of Lichfield.

6.17 There are no sites allocated for retail development outside town centres in Lichfield District that would be affected by competition with new retail floorspace in Lichfield city centre.

6.18 The Friarsgate site and the Bird Street/Backcester Lane sites are located in or on the edge of the town centre. Therefore it is necessary to judge whether the proposals are of an appropriate scale (in terms of gross floorspace) in relation to the size of the centre and its role in the hierarchy of centres. In Section 3 we have proposed a floorspace limit for Lichfield which takes account of the scale of development that would be appropriate in the city centre as a strategic centre. The proposed developments we have assessed are appropriate in scale to the role and function of the centre in the retail hierarchy.

6.19 Policy EC10 of PPS4 is not directly relevant to the consideration of sites in plan-making. However, it does highlight the importance of other factors that may be regarded as additional benefits in favour of new developments. These factors include impact on economic and physical regeneration in the area, including the impact on deprived areas and social inclusion objectives, and impact on local employment. Policy EC5 also refers to other considerations such as any physical regeneration benefits of developing on previously-developed sites, employment opportunities, increased investment in an area or social inclusion, which may be material to the choice of appropriate locations for development. We believe the allocation of the sites proposed for retail development in Lichfield would have clear benefits in terms of economic and physical regeneration, employment and social inclusion.

**Retail Impact of an Enlarged Town Centre at Burntwood**

6.20 The retail impact tables for Burntwood are included in Appendix 9 of this report, as follows:
Appendix 9A – Proposals by LCP for retail development in Burntwood, 2016
Appendix 9B – Potential for initial redevelopment of the Olaf Johnson site, 2016
Appendix 9C – Proposals for longer term redevelopment of the Olaf Johnson site, 2028
Appendix 9D – Cumulative impact of proposals for longer term retail development including the LCP scheme and the Olaf Johnson site, 2028

6.21 As part of the evidence base we have assessed the impact of an enlarged town centre at Burntwood and its implications for the vitality and viability of other centres in the Burntwood catchment area and in neighbouring Districts (Walsall and Cannock Chase). The impact assessment takes account of the approved LCP scheme and the potential for additional floorspace at Burntwood on the Olaf Johnson site.

6.22 Appendix 9A is a retail impact assessment of the LCP scheme for a non-food retail development on the Hoardings site. The assessment is for comparison goods only. It takes account of the additional comparison goods turnover in the Morrisons extension and the new Aldi store. The test year for the impact assessment is 2016. We estimate that 70% of the trade draw to the LCP scheme would be from clawback of leakage and 5% from inflow of trade from outside the catchment area. The other 25% would be trade diversion within the catchment area, including 20% from Lichfield city centre, 1% from Burntwood town centre (Sankey's Corner), 2% from Brownhills and 2% from other centres and stores in the catchment area, The predicted trade diversions in comparison goods are 3.1% from Lichfield city centre, 1.7% from Burntwood town centre, 2.1% from Brownhills and 3.0% from other centres and stores in the catchment area. The overall trade diversion in the catchment area is 2.9%. These are not significant levels of impact in comparison goods. The predicted impacts arising from clawback from outside the catchment area are 1.3% in Walsall town centre and 2.2% in Cannock town centre.

6.23 Impact has to be interpreted in the context of the vitality and viability of town centres. Section 5 of this report contains our updated health check of Burntwood town centre. The overall vitality and viability index obtained on the health check appraisal for Burntwood is 3.2 which is above average. Burntwood is a centre in need of improvement. It needs an improved retail offer and a consolidation of its retail provision to increase the critical mass of shopping in the centre. We believe that, despite some competition from new retail development on the Hoardings site, any initial trade losses will not be significant and there will be spin-off benefits for existing traders at Sankeys Corner. In any event the strength of Burntwood at present is in its convenience goods shopping and that role will continue.

6.24 Our health check of Lichfield city centre shows that its vitality and viability is well above average. The health of the centre is relatively strong and it will improve even further when the Friarsgate scheme takes place. In the context of the health of the city centre, the level of impact on comparison goods trade is not significant.

6.25 In Appendix 9B we show the impact of a potential initial redevelopment of the Olaf Johnson site. It is assumed that the first phase of development on the site would be in the form of a superstore with a net floorspace of 4,000 sq.m., equivalent to a gross floorspace of around 6,000 sq.m. The assessment is for convenience and comparison goods combined, with a test year of 2016. We estimate that a superstore would draw 50% of its trade from clawback of leakage, 10% from inflow of trade and 40% from trade diversion within the catchment area, including 15% from Lichfield city centre, 10% from

Burntwood town centre, 5% from Tesco in Lichfield, 5% from Brownhills and 5% from other stores and centres. The predicted trade diversions are 10.9% from Burntwood town centre (principally Morrisons), 3.3% from Lichfield city centre, 4.7% from Tesco in Lichfield, 2.9% from Brownhills and 2.9% from other centres and stores in the catchment area. The overall trade diversion in the catchment area is 4.0%. These are not significant levels of impact. The effect of clawback would be a small trade diversion of less than 2% from Walsall and Cannock town centres.

6.26 Appendix 9C is a retail impact assessment of a potential longer term redevelopment of the Olaf Johnson site for convenience and comparison goods retail development using a test year of 2028. The estimated turnover on the site is based on the turnover of the superstore in Appendix 9B and the capacity for additional comparison goods shopping in Burntwood in 2028 shown in Appendix 4D. Our need assessment in Appendix 4D identifies a capacity for £16.7m of additional comparison goods shopping in Burntwood in 2028. The estimated total turnover on the Olaf Johnson site in 2028 is £56.7m. We have increased the turnovers of centres to reflect expenditure growth in the catchment area and continued growth in sales productivity in external centres between 2011 and 2028.

6.27 We have adjusted the trade draw percentages to reflect the combination of convenience and comparison goods on the site, assuming 60% of total turnover from clawback, 10% from inflow and 30% from trade diversion. The predicted impacts are 5.3% from Burntwood town centre, 3.2% from Lichfield city centre, 4.5% from Tesco in Lichfield, 1.7% from Brownhills and 1.1% from other stores and centres. The overall trade diversion in the catchment area is 2.9%. The effect of clawback would be a small trade diversion of between 2% and 3% from Walsall and Cannock town centres. In PPS4 terms there would not be any significant adverse impacts on any centres, within or outside the catchment area.

6.28 In Appendix 9D we show the cumulative trading impact of the LCP scheme together with the longer term option of further retail development on the Olaf Johnson site based on total turnover (comparison and convenience goods) in 2028. The estimated turnover of the LCP scheme has been increased in line with expenditure growth and its trade draw percentages are the same as those in Appendix 9A. The estimated turnover on the Olaf Johnson site and the trade draws to the Olaf Johnson site are the same as those used in Appendix 9C.

6.29 The cumulative impacts shown in Appendix 9D in total turnover are 5.9% in Burntwood town centre, 5.4% in Lichfield city centre, 5.6% in Tesco Lichfield, 2.3% in Brownhills and 1.8% in other stores and centres. The overall cumulative trade diversion in the catchment area is 4.3%. In PPS4 terms there would not be any significant adverse impacts on any centres in the catchment area. The predicted impacts on Walsall and Cannock town centres are 3.6% and 4.3% respectively, which would not be significant.

6.30 With reference to the PPS4 guidance on impact assessments of sites, we have assessed the sites proposed for allocation for retail development in Burntwood. We have taken note of the fact that the proposals in Burntwood would increase the attraction of the centre and could have an impact on other centres. We have assessed the possible impact on those other centres. Our assessment is proportionate to the scale, nature and detail of the proposed developments. The assessment of the potential developments confirms that, taken cumulatively, the LCP scheme and the potential development on the Olaf Johnson site would not have an unacceptable impact on centres within the catchment of the potential development, as required by PPS4 Policy EC5.

6.31 Policy EC16 refers to the impact of a proposal on in-centre trade/turnover and on trade in the wider area, taking account of current and future consumer expenditure capacity in the catchment area up to five years ahead. Therefore the main concern is with centres within the defined catchment area. There is no requirement to assess the impact on centres outside the catchment area. In the case of Burntwood it is not strictly necessary to consider the likely impacts on Cannock and Walsall although we have done so for robustness. It is clear from our assessments that there will be no significant impacts on turnover in Cannock and Walsall town centres. For both the LCP scheme and any further development in the Burntwood town centre area, a major part of any impact arising outside the study area is likely to be on the out-of-centre retail parks in Cannock and Walsall. Impacts on these out-of-centre retail parks are a matter of competition, not a material planning consideration.

6.32 It should also be noted that in assessing impact we have not taken account of the implications of any future retail developments that may have a bearing on shopping patterns in the Burntwood area, other than the Friarsgate scheme in Lichfield which is included in the future turnover for Lichfield city centre. We have not examined the implications of any future retail development proposals in Cannock and Walsall which could have a negative impact on Burntwood town centre (and Lichfield city centre).

6.33 In relation to the other PPS4 Policy EC15 factors, there is no reason to suppose that the proposed developments in Burntwood would have any effect on public and private investment in centres in Lichfield District. The developments would clearly have a positive impact on investment in Burntwood town centre. In fact we recommend that the Olaf Johnson site should be included within the future town centre boundary of Burntwood. There is also no reason to suppose that there would be any effect on future investment in Lichfield city centre. We have taken account of the Friarsgate scheme in the future turnover of Lichfield city centre and we have shown that there would not be a significant adverse trading impact on the city centre that could harm the prospects of implementation of the Friarsgate scheme.

6.34 Lichfield city centre has a high level of vitality and viability and Burntwood town centre has an above average level of vitality and viability. Both centres will be well able to withstand any initial trade diversion that may occur from new retail developments in Burntwood. We do not anticipate any negative impact on the vitality and viability of these centres. On the contrary the vitality and viability of Burntwood town centre should improve as a result of the new retail developments. New retail development in Burntwood will increase local consumer choice and the range and quality of the comparison retail offer (and also the convenience retail offer if development on the Olaf Johnson site includes a superstore.

6.35 There are no sites allocated for retail development outside town centres in Lichfield District that would be affected by competition with new retail floorspace in Burntwood.

6.36 The LCP Hoardings site and the Olaf Johnson site are located in or on the edge of the town centre. Therefore it is necessary to judge whether the proposals are of an appropriate scale (in terms of gross floorspace) in relation to the size of the centre and its role in the hierarchy of centres. In Section 5 we indicated that the scale of development proposed in Burntwood, and the corresponding floorspace limit, reflect local needs. Burntwood would not change its status in the retail hierarchy. It would not become a strategic centre but it would have an enhanced role as a town centre, better serving the local needs of residents of Burntwood and the surrounding area.

6.37 As noted in our discussion of Lichfield, Policy EC5 refers to other considerations such as physical regeneration benefits of developing on previously-developed sites, employment opportunities, increased investment in an area or social inclusion, which may be material to the choice of appropriate locations for development. We believe the allocation of the sites proposed for retail development in Burntwood would have clear benefits in terms of economic and physical regeneration, employment and social inclusion.

## 7. APPLICATION OF OTHER PPS4 POLICY ADVICE

### Boundaries of Centres

7.1 PPS4 indicates that the Council should define the extent of the main centres and the primary shopping area in its Proposals Map having considered distinguishing between realistically defined primary and secondary frontages in designated centres and set policies that make clear which uses will be permitted in such locations. We have made detailed on-the-ground inspections of Lichfield city centre and Burntwood town centre. On this basis and taking account of the sites identified for new retail development in these centres, we have considered the most appropriate boundaries of centres and primary shopping areas in Lichfield and Burntwood.

#### *Lichfield*

7.2 The boundaries for Lichfield city centre are shown on the map in Figure 1 in this report. A city centre boundary is not defined in the adopted Local Plan but there is a primary retail area and a secondary retail area. The proposed city centre boundary for Lichfield extends to the edge of Minster Pool and Cross Keys in the north; Church Street in the east; the railway in the south; and the Friary Outer car park in the west. In addition to the primary shopping area, described below, the city centre boundary includes sites occupied by other main town centre uses – including office and commercial uses in Dam Street, Lombard Street, Birmingham Road, Queen Street, Sandford Street and Bird Street; the Lombard Street and Friary Outer car park; the Greenhill health centre; the fire station; the railway station and bus station; the Council offices; the police station; the library; and the telephone exchange. The proposed boundary includes the Friarsgate development site and the Bird Street car park. The Tesco site is classed as edge-of-centre.

7.3 The primary shopping area includes the primary and secondary shopping frontages. The primary frontages are concentrated in Market Street; the Market Square/Conduit Street; parts of Bore Street and Tamworth Street; and the Three Spires Shopping Centre. The secondary frontages are concentrated in Dam Street; the eastern part of Tamworth Street; the western part of Bore Street; Tudor Row; City Arcade; the eastern side of St John Street; and Bird Street.

#### *Burntwood*

7.4 The boundaries for Burntwood town centre are shown on the map in Figure 2. A town centre boundary is not defined in the adopted Local Plan but an area is designated as an area for New Shopping Development. The proposed town centre boundary for Burntwood extends to the car park at the rear of the Shopping Centre precinct; the new Aldi development site; the Morrisons store; the LCP Hoardings site; the Olaf Johnson site; and the former Bridge Cross Garage site. In addition to the primary shopping area, described below, the town centre boundary includes sites occupied by other main town centre uses – the health centre to the east of Rugeley Road; the library south of Bridge Cross Road; and the church adjacent to the Bridge Cross Garage site. It excludes areas which are predominantly residential.

7.5 The primary shopping area includes the primary and secondary shopping frontages. The primary shopping frontages are very compact. They include the Shopping Centre precinct; the Tesco supermarket; shops on the south side of Cannock Road; and the frontage to the Morrisons store. The secondary frontages are in part of Cannock Road; the west side of Rugeley Road; and parts of Bridge Cross Road.

**Floorspace Thresholds for Impact Assessments**

7.6 PPS4 states that the Council should consider setting floorspace thresholds for the scale of retail development outside centres (i.e. edge-of-centre and out-of-centre locations) which should be subject to an impact assessment under Policy EC16 and specify the geographic areas these thresholds will apply to. The application of floorspace thresholds for impact assessments should be based on the different levels of centres in the retail hierarchy. A distinction should be made between the town centres of Lichfield and Burntwood, and the local and village centres.

7.7 PPS4 refers to the need to assess the impact of developments over 2,500 sq.m. gross floorspace. In our view such a threshold is too large in the context of shopping provision in Lichfield District.

***Retail Development outside Lichfield City Centre and Burntwood Town Centre***

7.8 We suggest that major shopping proposals in locations outside the Primary Shopping Area in Lichfield city centre and Burntwood town centre should not be permitted, in order to protect the vitality and viability of existing centres, unless the proposal can be demonstrated to be acceptable under national planning policies contained in PPS4.

7.9 Floorspace thresholds for retail assessments are set out in Development Management Policy E1 of the document Core Strategy: Shaping our District'. A "major" shopping proposal is defined as a retail development of more than 1,000 sq.m. gross floorspace in Lichfield and more than 500 sq.m. gross floorspace in Burntwood. These figures reflect the role of the strategic and town centres in the retail hierarchy. Below this threshold, retail developments with a smaller amount of floorspace outside the Primary Shopping Area are not likely to have a significant impact on the town centres. However, the Council should have the discretion to request a retail impact assessment for a proposed development of less than 1,000 sq.m. gross in Lichfield and 500 sq.m. gross in Burntwood where in the Council's view it may have a significant impact on these centres, depending on the relative size and nature of the development in relation to the centre.

***Retail Developments Elsewhere***

7.10 We suggest that proposals for small-scale retail developments within the catchment areas of Local Centres and Neighbourhood Centres, and in smaller settlements should be permitted where they are below 200 sq. metres gross floorspace.

7.11 A small-scale retail development of less than 200 sq. metres gross floorspace would be appropriate to meet local needs. Above 200 sq. metres the impact of a proposed retail development should be assessed.

7.12 The threshold of 200 sq.m. is higher than the figure of 100 sq.m. referred to in Development Management Policy E1. In our opinion a proposed retail development as small as 100 sq.m. is too small to have any material impact on existing centres. Below 200 sq.m. it would be difficult to assess impact. Above 200 sq.m. there may be an impact on smaller centres which should be assessed. A small convenience store such as a Tesco Express or Sainsbury's Local is typically 300 - 400 sq.m. gross. This is the scale of development that the policy should apply to.

7.13 Therefore we recommend that the following thresholds are used by the Council in deciding whether a proposed development requires an impact assessment.

| | Assessment Required | Assessment may be Required |
|---|---|---|
| Lichfield | over 1,000 sq. metres gross | below 1,000 sq. metres gross |
| Burntwood | over 500 sq. metres gross | below 500 sq. metres gross |
| Smaller Centres | over 200 sq. metres gross | not required |

7.14 The application of these thresholds is explained below in relation to policy on smaller centres.

7.15 The adoption of these thresholds would give the Council a high degree of control over proposed retail developments outside centres. The thresholds would ensure that impact assessments are prepared with a level of detail and type of evidence and analysis that is proportionate to the scale and nature of the proposal and its likely impact. The type and level of information that needs to be included within an impact assessment should be discussed and agreed between the applicant and the Council.

**Policy on Smaller Centres**

7.16 PPS4 does not specifically give policy advice on smaller centres, although it does refer to the need for local authorities to take account of the requirements of its smaller centres, for example in:

- identifying any deficiencies in the provision of local convenience shopping and other facilities which serve people's day-to-day needs
- supporting shops, services and other important small scale economic uses in local centres and villages.
- ensuring that the scale of sites identified is in keeping with the role and function of the centre within the hierarchy of centres and the catchment served.

7.17 PPS4 refers to the need for local authorities to take account of the requirements of smaller centres, for example in:

- identifying any deficiencies in the provision of local convenience shopping and other facilities which serve people's day-to-day needs
- supporting shops, services and other important small scale economic uses in local centres and villages, and
- ensuring that the scale of sites identified is in keeping with the role and function of the centre within the hierarchy of centres and the catchment served.

7.18 The 'Core Strategy: Shaping our District' document defines the hierarchy of centres in the District as follows:

| | |
|---|---|
| Strategic Centre | Lichfield |
| Town Centre | Burntwood |
| Key Rural Centres | Alrewas, Armitage with Handsacre, Fazeley, Fradley, Little Aston, Shenstone & Whittington |
| Neighbourhood Centres | e.g. Boley Park, Curborough, Darwin Park, Netherstowe, Weston Road, Morley Road, Parkhill Road, Chasetown, Swan Island |
| Proposed Neighbourhood Centres | South Lichfield, Streethay, East of Rugeley |

7.19 We agree that this is an appropriate hierarchy of centres. The application of the floorspace thresholds for impact assessment should apply to these centres. Therefore, an application for more 1,000 sq.m. gross floorspace within the urban area of Lichfield and more 500 sq.m. gross floorspace within the urban area of Burntwood (outside the defined primary shopping areas) would be subject to an impact assessment. A retail proposal of more than 200 sq.m. would also require an impact assessment if it is located in any of the Key Rural Centres or within the catchment area of any of the Neighbourhood Centres.

**Monitoring**

7.20 The Council should use its annual monitoring reports to keep the following matters under review in order to inform consideration of the impact of policies and planning applications:

- the network and hierarchy of centres
- the need for further development and
- the vitality and viability of centres.

7.21 To measure the vitality and viability and monitor the health of town centres in Lichfield District over time and inform judgements about the impact of policies and development, the Council should also regularly collect market information and economic data on the key indicators set out at Annex D to PPS4. Because of the emphasis in PPS4 on keeping the evidence base up-to-date we would recommend that the health checks of Lichfield and Burntwood centres are carried out annually.

7.22 We would recommend that the Council considers making use of the Benchmarking approach developed by Action for Market Towns. Benchmarking is a practical web-based system which has been developed by market town partnerships. It is a method of capturing data on the most important indicators on town centre performance. Information is collected on twelve key performance indicators and the data is collated using an on-line recording system. By collecting data in a consistent manner, local authorities can compare the results for particular towns with other towns of a similar size and the national average.

7.23 The key performance indicators are shown below.

1. Total number of commercial units
2. Number of Convenience and Comparison retail units
3. Key attractors/multiple traders
4. Number of vacant units
5. Number of street markets and traders
6. Prime retail property yields
7. Zone A rental values
8. Footfall counts
9. Car park usage
10. Business confidence
11. Visitor perception/satisfaction
12. Shoppers origin postcode data.

7.24 Of the 13 indicators in PPS4 Annex D, 8 are covered by the Benchmarking indicators. The other 5 indicators comprise items on which local authorities will already hold information or should easily be able to obtain information about. The

Benchmarking indicators should be sufficient to meet the requirements of PPS4 on monitoring.

7.25 The Benchmarking approach has been applied successfully in more than 100 towns throughout England and Wales. The cost of obtaining a license to use it is very small and Action for Market Towns provides training and support. For the District Council it should be a cost-effective method of monitoring.

**Locally Important Impacts**

7.26 The Council should define any locally important impacts on centres which should be tested in impact assessments of new development proposals under Policy EC16.

7.27 With reference to Lichfield we believe that the locally important impacts that need to be considered are as follows:

- a qualitative need to expand the range and choice of shopping, in particular the representation of multiples
- protection of Lichfield's heritage assets so that new retail development preserves and enhances the character of the city centre.

7.28 With reference to Burntwood we believe that the locally important impacts that need to be considered are concerned with qualitative need, in particular:

- improving the retail offer and retailer representation in the centre
- increasing consumer choice for residents, and
- creating a critical mass of shopping that better serves the local community.

| APPENDIX 1: POPULATION | 2006 | 2011 | 2016 | 2021 | 2028 |
|---|---|---|---|---|---|
| | | | | | |
| **Burntwood wards** | | | | | |
| All Saints | 3,739 | 3,878 | 3,936 | 3,997 | 4,051 |
| Boney Hay | 3,396 | 3,522 | 3,575 | 3,631 | 3,679 |
| Chase Terrace | 5,192 | 5,387 | 5,467 | 5,436 | 5,510 |
| Chasetown | 3,706 | 3,843 | 3,901 | 3,962 | 4,015 |
| Hammerwich | 3,551 | 3,683 | 3,738 | 3,797 | 3,847 |
| Highfield | 3,289 | 3,411 | 3,462 | 3,516 | 3,563 |
| Burntwood Central | 3,353 | 3,478 | 3,530 | 3,585 | 3,633 |
| Summerfield | 4,191 | 4,347 | 4,412 | 4,481 | 4,541 |
| Sub-total | 30,416 | 31,549 | 32,024 | 32,524 | 33,112 |
| | | | | | |
| **Lichfield wards** | | | | | |
| Boley Park | 5,078 | 5,267 | 5,598 | 5,947 | 6,237 |
| Chadsmead | 3,795 | 3,937 | 4,184 | 4,445 | 4,661 |
| Curborough | 5,395 | 5,597 | 5,949 | 6,319 | 6,776 |
| Leomansley | 4,265 | 4,423 | 4,701 | 4,994 | 5,238 |
| St Johns | 5,311 | 5,509 | 5,855 | 6,220 | 6,523 |
| Stowe | 5,291 | 5,488 | 5,833 | 6,197 | 6,498 |
| Sub-total | 29,136 | 30,221 | 32,121 | 34,121 | 36,470 |
| | | | | | |
| **Northern Rural wards** | | | | | |
| Armitage with Handsacre | 5,304 | 5,703 | 6,254 | 6,834 | 7,327 |
| Colton and Mavesyn Ridware | 1,803 | 1,803 | 1,803 | 1,803 | 1,803 |
| Kings Bromley | 1,734 | 1,734 | 1,734 | 1,734 | 1,734 |
| Longdon | 1,892 | 1,892 | 1,892 | 1,892 | 1,892 |
| Sub Total | 10,733 | 11,132 | 11,683 | 12,263 | 12,945 |
| | | | | | |
| **Eastern Rural wards** | | | | | |
| Alrewas and Fradley | 4,852 | 5,292 | 5,824 | 6,384 | 6,640 |
| Mease and Tame | 3,503 | 3,503 | 3,503 | 3,503 | 3,503 |
| Whittington | 3,477 | 3,477 | 3,477 | 3,477 | 3,775 |
| Sub Total | 11,832 | 12,272 | 12,804 | 13,364 | 14,022 |
| | | | | | |
| **Southern Rural wards** | | | | | |
| Bourne Vale | 2,052 | 2,052 | 2,052 | 2,052 | 2,052 |
| Fazeley | 4,824 | 5,366 | 5,708 | 6,068 | 5,539 |
| Little Aston | 2,894 | 2,894 | 2,894 | 2,894 | 3,192 |
| Shenstone | 3,279 | 3,279 | 3,279 | 3,279 | 3,577 |
| Stonnall | 1,534 | 1,534 | 1,534 | 1,534 | 1,534 |
| Sub Total | 14,583 | 15,125 | 15,467 | 15,827 | 16,250 |
| | | | | | |
| **Lichfield District Total** | **96,700** | **100,300** | **104,100** | **108,100** | **112,800** |
| | | | | | |
| **Walsall District wards** | | | | | |
| Aldridge North and Walsall Wood | 12,693 | 12,853 | 13,046 | 13,275 | 13,581 |
| Brownhills | 12,399 | 12,555 | 12,744 | 12,968 | 13,266 |
| Sub Total | 25,092 | 25,408 | 25,789 | 26,243 | 26,847 |
| | | | | | |
| **Cannock Chase District wards** | | | | | |
| Hawks Green | 6,454 | 6,659 | 6,771 | 6,890 | 7,045 |
| Heath Hayes East and Wimblebury | 5,941 | 6,130 | 6,233 | 6,343 | 6,485 |
| Norton Canes | 6,536 | 6,744 | 6,857 | 6,978 | 7,134 |
| Rawnsley | 5,054 | 5,215 | 5,302 | 5,396 | 5,517 |
| Sub Total | 23,985 | 24,748 | 25,163 | 25,606 | 26,180 |
| | | | | | |
| **Study Area Total** | **145,777** | **150,456** | **155,053** | **159,950** | **165,827** |

Sources:
2006 - ward figures from GL Hearn Retail Study projected to 2006 using changes at District level
2011-2028: Lichfield District - ONS 2008-based population projections for Lichfield District
Lichfield wards based on LDF Core Strategy distribution of housing growth between zones
Walsall and Cannock Chase wards: growth rate based on ONS 2008-based subnational population projections for Districts

| APPENDIX 2A: CONVENIENCE GOODS EXPENDITURE PER CAPITA | | | | | | | |
|---|---|---|---|---|---|---|---|
| | **2001** | **2001** | **2006** | **2011** | **2016** | **2021** | **2028** |
| | | **(excluding special forms of trading)** | | | | | |
| | **£** | **£** | **£** | **£** | **£** | **£** | **£** |
| **Burntwood wards** | | | | | | | |
| All Saints | 1,555 | 1,532 | 1,608 | 1,533 | 1,559 | 1,595 | 1,651 |
| Boney Hay | 1,476 | 1,454 | 1,526 | 1,455 | 1,479 | 1,514 | 1,567 |
| Chase Terrace | 1,547 | 1,524 | 1,600 | 1,525 | 1,551 | 1,586 | 1,643 |
| Chasetown | 1,421 | 1,400 | 1,469 | 1,401 | 1,425 | 1,457 | 1,509 |
| Hammerwich | 1,611 | 1,587 | 1,666 | 1,588 | 1,615 | 1,652 | 1,711 |
| Highfield | 1,628 | 1,604 | 1,684 | 1,605 | 1,632 | 1,670 | 1,729 |
| Burntwood Central | 1,590 | 1,566 | 1,644 | 1,567 | 1,593 | 1,630 | 1,688 |
| Summerfield | 1,444 | 1,422 | 1,492 | 1,423 | 1,447 | 1,480 | 1,533 |
| | | | | | | | |
| **Lichfield wards** | | | | | | | |
| Boley Park | 1,615 | 1,591 | 1,670 | 1,592 | 1,619 | 1,656 | 1,715 |
| Chadsmead | 1,366 | 1,346 | 1,413 | 1,347 | 1,370 | 1,401 | 1,451 |
| Curborough | 1,427 | 1,406 | 1,476 | 1,407 | 1,431 | 1,464 | 1,516 |
| Leomansley | 1,581 | 1,557 | 1,634 | 1,558 | 1,584 | 1,621 | 1,678 |
| St Johns | 1,545 | 1,522 | 1,597 | 1,523 | 1,549 | 1,584 | 1,641 |
| Stowe | 1,511 | 1,488 | 1,562 | 1,489 | 1,514 | 1,549 | 1,604 |
| | | | | | | | |
| **Northern Rural wards** | | | | | | | |
| Armitage with Handsacre | 1,526 | 1,503 | 1,577 | 1,504 | 1,529 | 1,565 | 1,620 |
| Colton and Mavesyn Ridware | 1,555 | 1,532 | 1,608 | 1,533 | 1,559 | 1,595 | 1,651 |
| Kings Bromley | 1,559 | 1,536 | 1,612 | 1,537 | 1,563 | 1,599 | 1,656 |
| Longdon | 1,650 | 1,625 | 1,706 | 1,626 | 1,653 | 1,692 | 1,752 |
| | | | | | | | |
| **Eastern Rural wards** | | | | | | | |
| Alrewas and Fradley | 1,546 | 1,523 | 1,598 | 1,524 | 1,550 | 1,585 | 1,642 |
| Mease and Tame | 1,585 | 1,561 | 1,638 | 1,562 | 1,588 | 1,625 | 1,683 |
| Whittington | 1,585 | 1,561 | 1,638 | 1,562 | 1,588 | 1,625 | 1,683 |
| | | | | | | | |
| **Southern Rural wards** | | | | | | | |
| Bourne Vale | 1,557 | 1,534 | 1,610 | 1,535 | 1,561 | 1,597 | 1,654 |
| Fazeley | 1,486 | 1,464 | 1,537 | 1,465 | 1,490 | 1,524 | 1,578 |
| Little Aston | 1,552 | 1,529 | 1,605 | 1,530 | 1,556 | 1,592 | 1,648 |
| Shenstone | 1,578 | 1,554 | 1,631 | 1,555 | 1,581 | 1,618 | 1,675 |
| Stonnall | 1,616 | 1,592 | 1,671 | 1,593 | 1,620 | 1,657 | 1,716 |
| | | | | | | | |
| **Walsall District wards** | | | | | | | |
| Aldridge North and Walsall Wood | 1,576 | 1,552 | 1,629 | 1,553 | 1,579 | 1,616 | 1,673 |
| Brownhills | 1,514 | 1,491 | 1,565 | 1,492 | 1,517 | 1,552 | 1,607 |
| | | | | | | | |
| **Cannock Chase District wards** | | | | | | | |
| Hawks Green | 1,554 | 1,531 | 1,607 | 1,532 | 1,558 | 1,594 | 1,650 |
| Heath Hayes East and Wimblebury | 1,536 | 1,513 | 1,588 | 1,514 | 1,539 | 1,575 | 1,631 |
| Norton Canes | 1,517 | 1,494 | 1,568 | 1,495 | 1,520 | 1,555 | 1,610 |
| Rawnsley | 1,502 | 1,479 | 1,552 | 1,480 | 1,505 | 1,540 | 1,594 |
| | | | | | | | |
| **Notes** | | | | | | | |
| 2001 prices | | | | | | | |
| 2001 - GL Hearn Retail Study adjusted to exclude special forms of trading @ 1.5% | | | | | | | |
| 2006 - actual growth 2001-2006 = 6.8% (Pitney Bowes Retail Expenditure Guide 2011/2012, September 2011) | | | | | | | |
| 2011 - forecast growth 2006-2011 = -2.8% overall to 2010; 2010-2011 = 0.5% p.a. | | | | | | | |
| 2016 to 2021 - forecast growth 2011-2021 = 0.5% p.a. average, projected to 2028 | | | | | | | |
| Non-Store Retail Sales (Pitney Bowes Retail Expenditure Guide 2011/2012, August 2011) projected to 2028 | | | | | | | |
| | | 2001 | 2006 | 2011 | 2016 | 2021 | 2026 |
| convenience goods | | 1.5% | 3.2% | 5.5% | 6.3% | 6.5% | 6.5% |

## APPENDIX 2B: COMPARISON GOODS EXPENDITURE PER CAPITA

| | 2001 | 2001 | 2006 | 2011 | 2016 | 2021 | 2028 |
|---|---|---|---|---|---|---|---|
| | | (excluding special forms of trading) | | | | | |
| | £ | £ | £ | £ | £ | £ | £ |
| **Burntwood wards** | | | | | | | |
| All Saints | 2,222 | 2,066 | 2,760 | 2,880 | 3,423 | 4,130 | 5,398 |
| Boney Hay | 2,049 | 1,906 | 2,546 | 2,657 | 3,158 | 3,810 | 4,980 |
| Chase Terrace | 2,240 | 2,083 | 2,783 | 2,903 | 3,451 | 4,164 | 5,443 |
| Chasetown | 1,951 | 1,814 | 2,423 | 2,529 | 3,005 | 3,626 | 4,740 |
| Hammerwich | 2,322 | 2,159 | 2,884 | 3,009 | 3,577 | 4,316 | 5,641 |
| Highfield | 2,503 | 2,328 | 3,110 | 3,245 | 3,857 | 4,654 | 6,083 |
| Burntwood Central | 2,271 | 2,112 | 2,821 | 2,944 | 3,499 | 4,222 | 5,518 |
| Summerfield | 1,999 | 1,859 | 2,483 | 2,591 | 3,080 | 3,716 | 4,857 |
| | | | | | | | |
| **Lichfield wards** | | | | | | | |
| Boley Park | 2,494 | 2,319 | 3,098 | 3,232 | 3,842 | 4,636 | 6,059 |
| Chadsmead | 1,901 | 1,768 | 2,362 | 2,464 | 2,929 | 3,534 | 4,620 |
| Curborough | 1,997 | 1,857 | 2,481 | 2,588 | 3,077 | 3,712 | 4,852 |
| Leomansley | 2,326 | 2,163 | 2,889 | 3,015 | 3,584 | 4,324 | 5,652 |
| St Johns | 2,339 | 2,175 | 2,906 | 3,032 | 3,603 | 4,348 | 5,683 |
| Stowe | 2,159 | 2,008 | 2,682 | 2,799 | 3,327 | 4,014 | 5,247 |
| | | | | | | | |
| **Northern Rural wards** | | | | | | | |
| Armitage with Handsacre | 2,215 | 2,060 | 2,752 | 2,871 | 3,413 | 4,118 | 5,383 |
| Colton and Mavesyn Ridware | 2,289 | 2,129 | 2,844 | 2,968 | 3,527 | 4,256 | 5,563 |
| Kings Bromley | 2,347 | 2,183 | 2,916 | 3,043 | 3,617 | 4,364 | 5,704 |
| Longdon | 2,504 | 2,329 | 3,111 | 3,246 | 3,859 | 4,656 | 6,085 |
| | | | | | | | |
| **Eastern Rural wards** | | | | | | | |
| Alrewas and Fradley | 2,325 | 2,162 | 2,888 | 3,014 | 3,582 | 4,322 | 5,649 |
| Mease and Tame | 2,381 | 2,214 | 2,958 | 3,086 | 3,668 | 4,426 | 5,785 |
| Whittington | 2,428 | 2,258 | 3,016 | 3,147 | 3,741 | 4,514 | 5,900 |
| | | | | | | | |
| **Southern Rural wards** | | | | | | | |
| Bourne Vale | 2,271 | 2,112 | 2,821 | 2,944 | 3,499 | 4,222 | 5,518 |
| Fazeley | 2,084 | 1,938 | 2,589 | 2,701 | 3,211 | 3,874 | 5,064 |
| Little Aston | 2,397 | 2,229 | 2,978 | 3,107 | 3,693 | 4,456 | 5,824 |
| Shenstone | 2,383 | 2,216 | 2,960 | 3,089 | 3,671 | 4,430 | 5,790 |
| Stonnall | 2,442 | 2,271 | 3,034 | 3,166 | 3,763 | 4,540 | 5,934 |
| | | | | | | | |
| **Walsall District wards** | | | | | | | |
| Aldridge North and Walsall Wood | 2,243 | 2,086 | 2,787 | 2,908 | 3,456 | 4,170 | 5,451 |
| Brownhills | 2,098 | 1,951 | 2,606 | 2,719 | 3,232 | 3,900 | 5,098 |
| | | | | | | | |
| **Cannock Chase District wards** | | | | | | | |
| Hawks Green | 2,387 | 2,220 | 2,966 | 3,094 | 3,678 | 4,438 | 5,801 |
| Heath Hayes East and Wimblebury | 2,219 | 2,064 | 2,757 | 2,877 | 3,420 | 4,126 | 5,393 |
| Norton Canes | 2,113 | 1,965 | 2,625 | 2,739 | 3,256 | 3,928 | 5,134 |
| Rawnsley | 2,160 | 2,009 | 2,684 | 2,800 | 3,328 | 4,016 | 5,249 |

**Notes**

2001 prices

2001 - GL Hearn Retail Study adjusted to exclude special forms of trading @ 7.0%

2006 - actual growth 2001-2006 = 34.6% (Pitney Bowes Retail Expenditure Guide 2011/2012, September 2011)

2011 - forecast growth 2006-2011 = 6.3% overall to 2010; 2010-2011 = 3.9% p.a.

2016 to 2021 - forecast growth 2011-2016 = 3.9% p.a.; 2016-2021 = 4.0% p.a. , projected to 2028

Non-Store Retail Sales (Pitney Bowes Retail Expenditure Guide 2011/2012, August 2011) projected to 2028

| | 2001 | 2006 | 2011 | 2016 | 2021 | 2026 |
|---|---|---|---|---|---|---|
| comparison goods | 7.0% | 7.7% | 12.8% | 14.4% | 14.7% | 14.7% |

## APPENDIX 3A: TOTAL CONVENIENCE GOODS EXPENDITURE

**£ million in 2001 prices (excluding Non-Store Retail Sales)**

| | 2006 | 2011 | 2016 | 2021 | 2028 |
|---|---|---|---|---|---|
| **Burntwood wards** | | | | | |
| All Saints | 6.01 | 5.95 | 6.14 | 6.38 | 6.69 |
| Boney Hay | 5.18 | 5.13 | 5.29 | 5.50 | 5.77 |
| Chase Terrace | 8.31 | 8.22 | 8.48 | 8.62 | 9.05 |
| Chasetown | 5.44 | 5.39 | 5.56 | 5.77 | 6.06 |
| Hammerwich | 5.91 | 5.85 | 6.04 | 6.27 | 6.58 |
| Highfield | 5.54 | 5.48 | 5.65 | 5.87 | 6.16 |
| Burntwood Central | 5.51 | 5.45 | 5.62 | 5.84 | 6.13 |
| Summerfield | 6.26 | 6.19 | 6.38 | 6.63 | 6.96 |
| Sub Total | 48.16 | 47.64 | 49.16 | 50.89 | 53.40 |
| | | | | | |
| **Lichfield wards** | | | | | |
| Boley Park | 8.48 | 8.39 | 9.06 | 9.85 | 10.70 |
| Chadsmead | 5.36 | 5.30 | 5.73 | 6.23 | 6.76 |
| Curborough | 7.96 | 7.88 | 8.51 | 9.25 | 10.27 |
| Leomansley | 6.97 | 6.89 | 7.45 | 8.09 | 8.79 |
| St Johns | 8.48 | 8.39 | 9.07 | 9.86 | 10.70 |
| Stowe | 8.26 | 8.17 | 8.83 | 9.60 | 10.42 |
| Sub Total | 45.52 | 45.03 | 48.65 | 52.87 | 57.65 |
| | | | | | |
| **Northern Rural wards** | | | | | |
| Armitage with Handsacre | 8.37 | 8.58 | 9.56 | 10.69 | 11.87 |
| Colton and Mavesyn Ridware | 2.90 | 2.76 | 2.81 | 2.88 | 2.98 |
| Kings Bromley | 2.80 | 2.67 | 2.71 | 2.77 | 2.87 |
| Longdon | 3.23 | 3.08 | 3.13 | 3.20 | 3.31 |
| Sub Total | 17.29 | 17.09 | 18.21 | 19.54 | 21.03 |
| | | | | | |
| **Eastern Rural wards** | | | | | |
| Alrewas and Fradley | 7.76 | 8.07 | 9.03 | 10.12 | 10.90 |
| Mease and Tame | 5.74 | 5.47 | 5.56 | 5.69 | 5.89 |
| Whittington | 5.70 | 5.43 | 5.52 | 5.65 | 6.35 |
| Sub Total | 19.19 | 18.97 | 20.11 | 21.46 | 23.15 |
| | | | | | |
| **Southern Rural wards** | | | | | |
| Bourne Vale | 3.30 | 3.15 | 3.20 | 3.28 | 3.39 |
| Fazeley | 7.41 | 7.86 | 8.50 | 9.25 | 8.74 |
| Little Aston | 4.64 | 4.43 | 4.50 | 4.61 | 5.26 |
| Shenstone | 5.35 | 5.10 | 5.18 | 5.30 | 5.99 |
| Stonnall | 2.56 | 2.44 | 2.48 | 2.54 | 2.63 |
| Sub Total | 23.27 | 22.99 | 23.88 | 24.98 | 26.02 |
| | | | | | |
| **Walsall District wards** | | | | | |
| Aldridge North and Walsall Wood | 20.68 | 19.97 | 20.60 | 21.45 | 22.72 |
| Brownhills | 19.40 | 18.74 | 19.33 | 20.13 | 21.32 |
| Sub Total | 40.08 | 38.70 | 39.93 | 41.57 | 44.04 |
| | | | | | |
| **Cannock Chase District wards** | | | | | |
| Hawks Green | 10.37 | 10.20 | 10.55 | 10.98 | 11.63 |
| Heath Hayes East and Wimblebury | 9.43 | 9.28 | 9.60 | 9.99 | 10.58 |
| Norton Canes | 10.25 | 10.08 | 10.42 | 10.85 | 11.49 |
| Rawnsley | 7.85 | 7.72 | 7.98 | 8.31 | 8.79 |
| Sub Total | 37.90 | 37.29 | 38.55 | 40.13 | 42.49 |
| | | | | | |
| **Study Area Total** | **231.41** | **227.71** | **238.49** | **251.45** | **267.78** |

## APPENDIX 3B: TOTAL COMPARISON GOODS EXPENDITURE

**£ million in 2001 prices (excluding Non-Store Retail Sales)**

| | 2006 | 2011 | 2016 | 2021 | 2026 |
|---|---|---|---|---|---|
| **Burntwood wards** | | | | | |
| All Saints | 10.32 | 11.17 | 13.47 | 16.51 | 21.87 |
| Boney Hay | 8.65 | 9.36 | 11.29 | 13.83 | 18.32 |
| Chase Terrace | 14.45 | 15.64 | 18.87 | 22.64 | 29.99 |
| Chasetown | 8.98 | 9.72 | 11.72 | 14.37 | 19.03 |
| Hammerwich | 10.24 | 11.08 | 13.37 | 16.39 | 21.70 |
| Highfield | 10.23 | 11.07 | 13.35 | 16.36 | 21.67 |
| Burntwood Central | 9.46 | 10.24 | 12.35 | 15.14 | 20.05 |
| Summerfield | 10.41 | 11.26 | 13.59 | 16.65 | 22.06 |
| Sub Total | 82.73 | 89.54 | 108.02 | 131.88 | 174.68 |
| | | | | | |
| **Lichfield wards** | | | | | |
| Boley Park | 15.73 | 17.03 | 21.51 | 27.57 | 37.79 |
| Chadsmead | 8.96 | 9.70 | 12.26 | 15.71 | 21.53 |
| Curborough | 13.38 | 14.49 | 18.30 | 23.46 | 32.88 |
| Leomansley | 12.32 | 13.34 | 16.85 | 21.59 | 29.60 |
| St Johns | 15.43 | 16.70 | 21.10 | 27.04 | 37.07 |
| Stowe | 14.19 | 15.36 | 19.41 | 24.87 | 34.09 |
| Sub Total | 80.03 | 86.61 | 109.42 | 140.25 | 192.97 |
| | | | | | |
| **Northern Rural wards** | | | | | |
| Armitage with Handsacre | 14.60 | 16.38 | 21.35 | 28.14 | 39.44 |
| Colton and Mavesyn Ridware | 5.13 | 5.35 | 6.36 | 7.67 | 10.03 |
| Kings Bromley | 5.06 | 5.28 | 6.27 | 7.57 | 9.89 |
| Longdon | 5.89 | 6.14 | 7.30 | 8.81 | 11.51 |
| Sub Total | 30.67 | 33.15 | 41.28 | 52.19 | 70.87 |
| | | | | | |
| **Eastern Rural wards** | | | | | |
| Alrewas and Fradley | 14.01 | 15.95 | 20.86 | 27.59 | 37.51 |
| Mease and Tame | 10.36 | 10.81 | 12.85 | 15.50 | 20.26 |
| Whittington | 10.49 | 10.94 | 13.01 | 15.69 | 22.27 |
| Sub Total | 34.86 | 37.70 | 46.72 | 58.79 | 80.05 |
| | | | | | |
| **Southern Rural wards** | | | | | |
| Bourne Vale | 5.79 | 6.04 | 7.18 | 8.66 | 11.32 |
| Fazeley | 12.49 | 14.50 | 18.33 | 23.51 | 28.05 |
| Little Aston | 8.62 | 8.99 | 10.69 | 12.90 | 18.59 |
| Shenstone | 9.71 | 10.13 | 12.04 | 14.53 | 20.71 |
| Stonnall | 4.65 | 4.86 | 5.77 | 6.96 | 9.10 |
| Sub Total | 41.26 | 44.51 | 54.01 | 66.56 | 87.78 |
| | | | | | |
| **Walsall District wards** | | | | | |
| Aldridge North and Walsall Wood | 35.37 | 37.37 | 45.09 | 55.36 | 74.02 |
| Brownhills | 32.32 | 34.14 | 41.19 | 50.58 | 67.63 |
| Sub Total | 67.69 | 71.52 | 86.28 | 105.93 | 141.65 |
| | | | | | |
| **Cannock Chase District wards** | | | | | |
| Hawks Green | 19.14 | 20.61 | 24.90 | 30.58 | 40.86 |
| Heath Hayes East and Wimblebury | 16.38 | 17.64 | 21.31 | 26.17 | 34.97 |
| Norton Canes | 17.16 | 18.47 | 22.32 | 27.41 | 36.63 |
| Rawnsley | 13.56 | 14.60 | 17.65 | 21.67 | 28.96 |
| Sub Total | 66.24 | 71.32 | 86.19 | 105.83 | 141.42 |
| | | | | | |
| **Study Area Total** | **403.47** | **434.34** | **531.91** | **661.43** | **889.43** |

## APPENDIX 4A: CAPACITY ANALYSIS, CONVENIENCE GOODS

**Lichfield Catchment Area (2001 prices)**

| | 2006 | 2011 | 2016 | 2021 | 2028 |
|---|---|---|---|---|---|
| **Residents' expenditure in catchment area (£m)** | | | | | |
| **Primary catchment** | | | | | |
| Lichfield wards | 45.52 | 45.03 | 48.65 | 52.87 | 57.65 |
| **Secondary catchment** | | | | | |
| Burntwood wards | 48.16 | 47.64 | 49.16 | 50.89 | 53.40 |
| Northern Rural wards | 17.29 | 17.09 | 18.21 | 19.54 | 21.03 |
| Eastern Rural wards | 19.19 | 18.97 | 20.11 | 21.46 | 23.15 |
| Southern Rural wards | 23.27 | 22.99 | 23.88 | 24.98 | 26.02 |
| Secondary catchment total | 107.91 | 106.69 | 111.36 | 116.87 | 123.60 |
| | | | | | |
| Total expenditure from catchment (£m) | 153.43 | 151.72 | 160.01 | 169.74 | 181.25 |
| | | | | | |
| **Turnover in Lichfield (£m)** [1] | | | | | |
| from primary catchment | 42.07 | | | | |
| from secondary catchment | 31.40 | | | | |
| total turnover from catchment area | 73.47 | | | | |
| inflow (additional 5% of turnover) | 3.67 | | | | |
| total turnover in Lichfield | 77.14 | | | | |
| | | | | | |
| **Retention levels** [2] | existing | | forecasts | | |
| primary catchment | 92% | 95% | 95% | 95% | 95% |
| secondary catchment | 29% | 31% | 31% | 31% | 31% |
| overall retention | 48% | 50% | 50% | 51% | 51% |
| | | | | | |
| **Expenditure available to be spent in Lichfield (£m)** | | | | | |
| from primary catchment | | 42.78 | 46.22 | 50.23 | 54.77 |
| from secondary catchment | | 33.07 | 34.52 | 36.23 | 38.32 |
| total expenditure available | | 75.85 | 80.74 | 86.46 | 93.08 |
| | | | | | |
| Future turnover in Lichfield from catchment (£m) [3] | | 73.47 | 74.95 | 76.46 | 77.54 |
| | | | | | |
| Surplus expenditure capacity (£m) | | 2.38 | 5.79 | 10.00 | 15.55 |
| | | | | | |
| Turnover of commitments (£m) [4] | | 10.14 | 22.63 | 22.63 | 22.63 |
| | | | | | |
| Residual capacity (£m) | | -7.76 | -16.84 | -12.63 | -7.08 |

[1] Survey-based turnover 2004 from Retail Study increased to 2006
allowing for the development of the new Waitrose supermarket at Walsall Road, Lichfield

| | | |
|---|---|---|
| Waitrose convenience goods turnover | £17.81m | |
| turnover additional to the catchment (50%) | £8.91m | |

trade draw from primary and secondary catchments the same as in 2004

[2] assuming an increase in retention based on potential for clawback of leakage

[3] assuming growth in sales densities in convenience goods of 0.4% p.a. 2011-2021 then 0.2% p.a.

| [4] Commitments: | sq.m. net | sales | turnover | |
|---|---|---|---|---|
| (convenience goods only) | | per sq.m. | £m | |
| Morrisons extension, Burntwood | 267 | £9,360 | 2.50 | |
| replacement Tesco store, Lichfield | 1,289 | - | 4.61 | (additional turnover) |
| Lidl, Eastern Avenue, Lichfield | 630 | £2,830 | 1.78 | |
| Friarsgate, Lichfield | 1,000 | £9,600 | 9.60 | (after 2011) |
| Aldi, Burntwood | 842 | £3,430 | 2.89 | (after 2011) |
| Local centre, Fradley | 250 | £5,000 | 1.25 | |
| total | 4,278 | | 22.63 | |

## APPENDIX 4B: CAPACITY ANALYSIS, CONVENIENCE GOODS

**Burntwood Catchment Area (2001 prices)**

| | **2006** | **2011** | **2016** | **2021** | **2028** |
|---|---|---|---|---|---|
| **Residents' expenditure in catchment area (£m)** | | | | | |
| **Primary catchment** | | | | | |
| Burntwood wards | 48.16 | 47.64 | 49.16 | 50.89 | 53.40 |
| **Secondary catchment** | | | | | |
| Walsall District wards | 40.08 | 38.70 | 39.93 | 41.57 | 44.04 |
| Cannock Chase District wards | 37.90 | 37.29 | 38.55 | 40.13 | 42.49 |
| Secondary catchment total | 77.98 | 75.99 | 78.48 | 81.70 | 86.53 |
| | | | | | |
| Total expenditure from catchment (£m) | 126.14 | 123.63 | 127.64 | 132.59 | 139.93 |
| | | | | | |
| **Turnover in Burntwood (£m)** [1] | | | | | |
| from primary catchment | 25.49 | | | | |
| from secondary catchment | 3.61 | | | | |
| total turnover from catchment area | 29.10 | | | | |
| inflow (additional 5% of turnover) | 1.46 | | | | |
| total turnover in Burntwood | 30.56 | | | | |
| | | | | | |
| **Retention levels** [2] | existing | | forecasts | | |
| primary catchment | 53% | 57% | 57% | 57% | 57% |
| secondary catchment | 5% | 5% | 5% | 5% | 5% |
| overall retention | 23% | 25% | 25% | 25% | 25% |
| | | | | | |
| **Expenditure available to be spent in Burntwood (£m)** | | | | | |
| from primary catchment | | 27.15 | 28.02 | 29.01 | 30.44 |
| from secondary catchment | | 3.80 | 3.92 | 4.09 | 4.33 |
| total expenditure available | | 30.95 | 31.95 | 33.09 | 34.76 |
| | | | | | |
| Future turnover in Burntwood from catchment (£m) [3] | | 29.10 | 29.69 | 30.29 | 30.71 |
| | | | | | |
| Surplus expenditure capacity (£m) | | 1.85 | 2.26 | 2.81 | 4.05 |
| | | | | | |
| Turnover of commitments (£m) [4] | | 2.50 | 5.39 | 5.39 | 5.39 |
| | | | | | |
| Residual capacity (£m) | | -0.65 | -3.13 | -2.58 | -1.34 |

[1] Survey-based turnover 2004 from Retail Study increased to 2006
in line with expenditure growth in catchment area
[2] assuming an increase in retention based on potential for clawback of leakage
[3] assuming growth in sales densities in convenience goods of 0.4% p.a. 2011-2021 then 0.2% p.a.

| [4] Commitments: | sq.m. net | sales | turnover | |
|---|---|---|---|---|
| (convenience goods only) | | per sq.m. | £m | |
| Morrisons extension, Burntwood | 267 | £9,360 | 2.50 | |
| Aldi, Burntwood | 842 | £3,430 | 2.89 | (after 2011) |
| | 1,109 | | 5.39 | |

## APPENDIX 4C: CAPACITY ANALYSIS, COMPARISON GOODS

**Lichfield Catchment Area (2001 prices)**

| | 2006 | 2011 | 2016 | 2021 | 2028 |
|---|---|---|---|---|---|
| **Residents' expenditure in catchment area (£m)** | | | | | |
| **Primary catchment** | | | | | |
| Lichfield wards | 80.03 | 86.61 | 109.42 | 140.25 | 192.97 |
| **Secondary catchment** | | | | | |
| Burntwood wards | 82.73 | 89.54 | 108.02 | 131.88 | 174.68 |
| Northern Rural wards | 30.67 | 33.15 | 41.28 | 52.19 | 70.87 |
| Eastern Rural wards | 34.86 | 37.70 | 46.72 | 58.79 | 80.05 |
| Southern Rural wards | 41.26 | 44.51 | 54.01 | 66.56 | 87.78 |
| Secondary catchment total | 189.52 | 204.90 | 250.03 | 309.42 | 413.38 |
| | | | | | |
| Total expenditure from catchment (£m) | 269.55 | 291.51 | 359.45 | 449.67 | 606.35 |
| | | | | | |
| **Turnover in Lichfield (£m)** [1] | | | | | |
| from primary catchment | 36.54 | | | | |
| from secondary catchment | 43.61 | | | | |
| total turnover from catchment area | 80.14 | | | | |
| inflow (additional 15% of turnover) | 12.02 | | | | |
| total turnover in Lichfield | 92.16 | | | | |
| | | | | | |
| **Retention levels** [2] | existing | | forecasts | | |
| primary catchment | 46% | 60% | 65% | 65% | 65% |
| secondary catchment | 23% | 25% | 35% | 35% | 35% |
| overall retention | 30% | 35% | 44% | 44% | 45% |
| | | | | | |
| **Expenditure available to be spent in Lichfield (£m)** | | | | | |
| from primary catchment | | 51.97 | 71.12 | 91.16 | 125.43 |
| from secondary catchment | | 51.23 | 87.51 | 108.30 | 144.68 |
| total expenditure available | | 103.19 | 158.63 | 199.46 | 270.11 |
| | | | | | |
| Future turnover in Lichfield from catchment (£m) [3] | | 80.14 | 87.19 | 94.86 | 106.74 |
| | | | | | |
| Surplus expenditure capacity (£m) | | 23.05 | 71.44 | 104.60 | 163.38 |
| | | | | | |
| Turnover of commitments (£m) [4] | | 26.14 | 113.07 | 113.07 | 113.07 |
| | | | | | |
| Residual capacity (£m) | | -3.09 | -41.63 | -8.47 | 50.31 |

[1] Survey-based turnover 2004 from Retail Study increased to 2006 in line with expenditure growth in catchment area

[2] assuming an increase in retention based on potential for clawback of leakage

[3] assuming growth in sales densities in comparison goods of 1.7% p.a. after 2011

| [4] Commitments: | sq.m. net | sales | turnover | |
|---|---|---|---|---|
| (comparison goods only) | | per sq.m. | £m | |
| Friarsgate, Lichfield | 14,586 | £4,108 | 59.92 | (after 2011) |
| replacement Tesco store, Lichfield | 2,460 | - | 13.08 | (additional turnover) |
| Vulcan Road, Lichfield | 3,013 | £2,627 | 7.92 | |
| Morrisons extension, Burntwood | 534 | £5,879 | 3.14 | |
| Aldi, Burntwood | 149 | £3,430 | 0.51 | (after 2011) |
| Local centre, Fradley | 500 | £4,000 | 2.00 | |
| LCP scheme, Burntwood | 6,584 | £4,025 | 26.50 | (after 2011) |
| Total | 27,826 | - | 113.07 | |

## APPENDIX 4D: CAPACITY ANALYSIS, COMPARISON GOODS

**Burntwood Catchment Area (2001 prices)**

| | 2006 | 2011 | 2016 | 2021 | 2028 |
|---|---|---|---|---|---|
| **Residents' expenditure in catchment area (£m)** | | | | | |
| **Primary catchment** | | | | | |
| Burntwood wards | 82.73 | 89.54 | 108.02 | 131.88 | 174.68 |
| **Secondary catchment** | | | | | |
| Walsall District wards | 67.69 | 71.52 | 86.28 | 105.93 | 141.65 |
| Cannock Chase District wards | 66.24 | 71.32 | 86.19 | 105.83 | 141.42 |
| Secondary catchment total | 133.93 | 142.84 | 172.47 | 211.76 | 283.07 |
| | | | | | |
| Total expenditure from catchment (£m) | 216.66 | 232.38 | 280.49 | 343.64 | 457.75 |
| | | | | | |
| **Turnover in Burntwood (£m)** [1] | | | | | |
| from primary catchment | 3.98 | | | | |
| from secondary catchment | 2.33 | | | | |
| total turnover from catchment area | 6.31 | | | | |
| inflow (additional 5% of turnover) | 0.32 | | | | |
| total turnover in Burntwood | 6.63 | | | | |
| | | | | | |
| **Retention levels** [2] | | | forecasts | | |
| primary catchment | 5% | 8% | 25% | 25% | 25% |
| secondary catchment | 2% | 2% | 4% | 4% | 4% |
| overall retention | 3% | 4% | 12% | 12% | 12% |
| | | | | | |
| **Expenditure available to be spent in Burntwood (£m)** | | | | | |
| from primary catchment | | 7.16 | 27.01 | 32.97 | 43.67 |
| from secondary catchment | | 2.86 | 6.90 | 8.47 | 11.32 |
| total expenditure available | | 10.02 | 33.90 | 41.44 | 54.99 |
| | | | | | |
| Future turnover in Burntwood from catchment (£m) [3] | | 6.31 | 6.86 | 7.47 | 8.12 |
| | | | | | |
| Surplus expenditure capacity (£m) | | 3.71 | 27.04 | 33.97 | 46.87 |
| | | | | | |
| Turnover of commitments (£m) [4] | | 3.14 | 30.15 | 30.15 | 30.15 |
| | | | | | |
| Residual capacity (£m) | | 0.57 | -3.11 | 3.82 | 16.72 |
| | | | | | |
| | | | | | |
| [1] Survey-based turnover 2004 from Retail Study increased to 2006 | | | | | |
| in line with expenditure growth in catchment area | | | | | |
| [2] assuming an increase in retention based on potential for clawback of leakage | | | | | |
| [3] assuming growth in sales densities in comparison goods of 1.7% p.a. after 2011 | | | | | |
| [4] Commitments: | sq.m. net | sales | turnover | | |
| (comparison goods only) | | per sq.m. | £m | | |
| Morrisons extension, Burntwood | 534 | £5,879 | 3.14 | | |
| LCP scheme, Burntwood | 6,584 | £4,025 | 26.50 | (after 2011) | |
| Aldi, Burntwood | 149 | £3,430 | 0.51 | (after 2011) | |
| | 7,267 | - | 30.15 | | |

## APPENDIX 4E: CAPACITY ANALYSIS, BULKY GOODS

**Lichfield Catchment Area (2001 prices)**

| | 2006 | 2011 | 2016 | 2021 | 2028 |
|---|---|---|---|---|---|
| **Residents' expenditure in catchment area (£m) [1]** | | | | | |
| **Primary catchment** | | | | | |
| Lichfield wards | 26.51 | 28.58 | 36.11 | 46.28 | 63.68 |
| **Secondary catchment** | | | | | |
| Burntwood wards | 27.30 | 29.55 | 35.65 | 43.52 | 57.64 |
| Northern Rural wards | 10.12 | 10.94 | 13.62 | 17.22 | 23.39 |
| Eastern Rural wards | 11.50 | 12.44 | 15.42 | 19.40 | 26.42 |
| Southern Rural wards | 13.62 | 14.69 | 17.82 | 21.96 | 28.97 |
| Secondary catchment total | 62.54 | 67.62 | 82.51 | 102.11 | 136.42 |
| | | | | | |
| Total expenditure from catchment (£m) | 89.05 | 96.20 | 118.62 | 148.39 | 200.10 |
| | | | | | |
| **Turnover in Lichfield (£m)** [2] | | | | | |
| total bulky goods turnover | 14.48 | | | | |
| | | | | | |
| **Retention level** [3] | | | forecasts | | |
| overall retention level in catchment | 16% | 20% | 20% | 20% | 20% |
| | | | | | |
| **Expenditure available to be spent in Lichfield (£m)** | | | | | |
| expenditure retained in overall catchment | | 19.24 | 23.72 | 29.68 | 40.02 |
| | | | | | |
| Future turnover in Lichfield from catchment (£m) [4] | | 14.48 | 15.75 | 17.14 | 18.64 |
| | | | | | |
| Surplus expenditure capacity (£m) | | 4.76 | 7.97 | 12.54 | 21.38 |
| | | | | | |
| Turnover of commitments (£m) [5] | | 5.28 | 5.28 | 5.28 | 5.28 |
| | | | | | |
| Residual capacity (£m) | | -0.52 | 2.69 | 7.26 | 16.10 |
| | | | | | |
| | | | | | |
| [1] Bulky goods expenditure = 33% of all comparison goods expenditure | | | | | |
| [2] Existing bulky goods turnover 2004: | sq.m. net | sales | turnover | | |
| | | per sq.m. | £m | | |
| Lichfield city centre | 3,063 | £2,500 | 7.66 | | |
| Focus DIY | 3,634 | £1,088 | 3.95 | | |
| Magnet | 1,114 | £1,404 | 1.56 | | |
| | 7,811 | - | 13.18 | | |
| 2006 estimate based on expenditure growth 2004-2006 | | | | | |
| [3] assuming an increase in retention based on potential for clawback of leakage | | | | | |
| [4] excluding former Focus DIY and assuming growth in sales densities in bulky goods of 1.7% p.a. after 2011 | | | | | |
| [5] Commitments: | sq.m. net | sales | turnover | | |
| (bulky goods only) | | per sq.m. | £m | | |
| Lichfield Retail Park | 3,515 | £2,627 | 9.23 | | |
| less former Focus DIY | | | 3.95 | | |
| | | | 5.28 | | |

| APPENDIX 5A: FLOORSPACE CAPACITY, CONVENIENCE GOODS<br>(2001 prices) | | | |
|---|---|---|---|
| | | | |
| | 2016 | 2021 | 2028 |
| **Lichfield** | | | |
| | | | |
| residual capacity (£m) [1] | -16.84 | -12.63 | -7.08 |
| | | | |
| turnover/floorspace ratio (£ per sq.m. net) [2] | | | |
| upper | 11,222 | 11,448 | 11,609 |
| lower | 4,080 | 4,163 | 4,222 |
| net floorspace (sq.m.) | | | |
| minimum | nil | nil | nil |
| maximum | nil | nil | nil |
| gross floorspace (sq.m.) [3] | | | |
| minimum | nil | nil | nil |
| maximum | nil | nil | nil |
| | | | |
| **Burntwood** | | | |
| | | | |
| residual capacity (£m) [1] | -3.13 | -2.58 | -1.34 |
| | | | |
| turnover/floorspace ratio (£ per sq.m. net) [2] | | | |
| upper | 11,222 | 11,448 | 11,609 |
| lower | 4,080 | 4,163 | 4,222 |
| net floorspace (sq.m.) | | | |
| minimum | nil | nil | nil |
| maximum | nil | nil | nil |
| gross floorspace (sq.m.) [3] | | | |
| minimum | nil | nil | nil |
| maximum | nil | nil | nil |
| | | | |
| | | | |
| [1] after allowing for commitments | | | |
| [2] assuming increase in sales productivity of 0.4% p.a. from 2011 to 2021, then 0.2% p.a. to 2028 | | | |
| [3] assuming a net/gross floorspace ratio of 70% | | | |

## APPENDIX 5B: FLOORSPACE CAPACITY, COMPARISON GOODS

**(2001 prices)**

| | 2016 | 2021 | 2028 |
|---|---|---|---|
| **Lichfield** | | | |
| | | | |
| residual capacity (£m) [1] | -41.63 | -8.47 | 50.31 |
| | | | |
| turnover/floorspace ratio (£ per sq.m. net) [2] | | | |
| upper | 6,201 | 6,747 | 7,592 |
| lower | 4,352 | 4,734 | 5,327 |
| net floorspace (sq.m.) | | | |
| minimum | nil | nil | 6,627 |
| maximum | nil | nil | 9,444 |
| gross floorspace (sq.m.) [3] | | | |
| minimum | nil | nil | 9,467 |
| maximum | nil | nil | 13,492 |
| | | | |
| **Burntwood** | | | |
| | | | |
| residual capacity (£m) [1] | -3.11 | 3.82 | 16.72 |
| | | | |
| turnover/floorspace ratio (£ per sq.m. net) [2] | | | |
| upper | 6,201 | 6,747 | 7,592 |
| lower | 4,352 | 4,734 | 5,327 |
| net floorspace (sq.m.) | | | |
| minimum | nil | 566 | 2,202 |
| maximum | nil | 807 | 3,139 |
| gross floorspace (sq.m.) [3] | | | |
| minimum | nil | 809 | 3,146 |
| maximum | nil | 1,153 | 4,484 |

[1] after allowing for commitments
[2] assuming increase in sales productivity of 1.7% p.a. from 2011
[3] assuming a net/gross floorspace ratio of 70%

## APPENDIX 5C: FLOORSPACE CAPACITY, BULKY GOODS

**(2001 prices)**

| | 2016 | 2021 | 2028 |
|---|---|---|---|
| **Lichfield** | | | |
| | | | |
| residual capacity (£m) [1] | 2.69 | 7.26 | 16.10 |
| | | | |
| turnover/floorspace ratio (£ per sq.m. net) [2] | 3,264 | 3,551 | 3,995 |
| | | | |
| net floorspace (sq.m.) | 824 | 2,044 | 4,030 |
| | | | |
| gross floorspace (sq.m.) [3] | 1,030 | 2,556 | 5,038 |

[1] after allowing for commitments
[2] assuming increase in sales productivity of 1.7% p.a. from 2011
[3] assuming a net/gross floorspace ratio of 80%

## APPENDIX 6: HEALTH CHECK APPRAISAL SHEET, LICHFIELD

| INDICATOR | FACTOR | * SCORE |
|---|---|---|
| **Diversity of Main Town Centre Uses** | Number and type of shops | 4 |
| | Amount of shopping floorspace | 4 |
| | Supply of offices | 3 |
| | Leisure, cultural and entertainment activities | 4 |
| | Pubs, cafes and restaurants | 4 |
| | Hotels | 4 |
| **Floorspace outside Centre** | Retail, leisure and office floorspace outside centre | 4 |
| **Capacity for Growth or Change** | Opportunities for centre to expand or consolidate | 4 |
| **Retailer Representation** | Number of multiple retailers | 3 |
| | Variety of specialist/independent shops | 4 |
| | Street markets | 4 |
| | Availability of food shopping | 4 |
| | Evidence of recent investment by retailers | 4 |
| | Retailer demand | 3 |
| | Presence of charity shops | 4 |
| **Shopping Rents** | Zone A rental values | 3 |
| **Vacant Properties** | Vacancy rate | 4 |
| | Vacant floorspace | 4 |
| **Commercial Yields** | Shopping centre yield | 4 |
| **Land Values** | Changes in land values | - |
| | Length of time key sites have remained undeveloped | 3 |
| **Pedestrian Flows** | Volume of pedestrian flow (footfall) | 4 |
| **Accessibility** | Car parking | 4 |
| | Frequency and quality of public transport | 4 |
| | Range of places served by public transport | 4 |
| | Ease of movement for pedestrians, cyclists & disabled | 4 |
| | Ease of access to main attractions | 4 |
| **Customer and Residents' Views and Behaviour** | Satisfaction with the centre | 3 |
| | Need for improvements | 3 |
| | Linked trips | 4 |
| **Safety and Security** | Feeling of security (eg CCTV) | 4 |
| | Safety of evening and night-time economy | 4 |
| **Environmental Quality** | Physical appearance of properties | 3.3 |
| | Environmental problems (air pollution, noise, litter) | 4 |
| | Quality of open spaces/ landscaping | 5 |
| | Availability and condition of toilets | 3 |
| | **VITALITY AND VIABILITY INDEX** | **3.8** |

*  1 = very poor; 2 = poor; 3 = fair; 4 = good; 5 = very good

## APPENDIX 7: HEALTH CHECK APPRAISAL SHEET, BURNTWOOD

| INDICATOR | FACTOR | * SCORE |
|---|---|---|
| | | |
| **Diversity of Main** | Number and type of shops | 3 |
| **Town Centre Uses** | Amount of shopping floorspace | 3 |
| | Supply of offices | 3 |
| | Leisure, cultural and entertainment activities | 3 |
| | Pubs, cafes and restaurants | 3 |
| | Hotels | - |
| | | |
| **Floorspace outside Centre** | Retail, leisure and office floorspace outside centre | 4 |
| | | |
| **Capacity for Growth or Change** | Opportunities for centre to expand or consolidate | 5 |
| | | |
| **Retailer Representation** | Number of multiple retailers | 2 |
| | Variety of specialist/independent shops | 3 |
| | Street markets | - |
| | Availability of food shopping | 4 |
| | Evidence of recent investment by retailers | 4 |
| | Retailer demand | 2 |
| | Presence of charity shops | 4 |
| | | |
| **Shopping Rents** | Zone A rental values | - |
| | | |
| **Vacant Properties** | Vacancy rate | 3 |
| | Vacant floorspace | 3 |
| | | |
| **Commercial Yields** | Shopping centre yield | - |
| | | |
| **Land Values** | Changes in land values | - |
| | Length of time key sites have remained undeveloped | 2 |
| | | |
| **Pedestrian Flows** | Volume of pedestrian flow (footfall) | 3 |
| | | |
| **Accessibility** | Car parking | 4 |
| | Frequency and quality of public transport | 4 |
| | Range of places served by public transport | 4 |
| | Ease of movement for pedestrians, cyclists & disabled | 3 |
| | Ease of access to main attractions | 4 |
| | | |
| **Customer and Residents'** | Satisfaction with the centre | 2 |
| **Views and Behaviour** | Need for improvements | 2 |
| | Linked trips | 3 |
| | | |
| **Safety and Security** | Feeling of security (eg CCTV) | 4 |
| | Safety of evening and night-time economy | 4 |
| | | |
| **Environmental Quality** | Physical appearance of properties | 2.9 |
| | Environmental problems (air pollution, noise, litter) | 3 |
| | Quality of open spaces/ landscaping | 3 |
| | Availability and condition of toilets | 2 |
| | | |
| | **VITALITY AND VIABILITY INDEX** | **3.2** |
| | | |

* 1 = very poor; 2 = poor; 3 = fair; 4 = good; 5 = very good

## APPENDIX 8

## IMPACT TABLES, LICHFIELD

## RETAIL IMPACT ASSESSMENT, COMPARISON GOODS, 2016 (in 2001 prices)

## APPENDIX 8A: PROPOSALS FOR FRIARSGATE DEVELOPMENT, BIRMINGHAM ROAD, LICHFIELD

| | | Friarsgate scheme | | |
|---|---|---|---|---|
| | comparison turnover 2016 (£m) [1] | share of trade draw [2] | trade diversion £m | trading impact % |
| **Catchment Area** | | | | |
| Lichfield city centre [3] | 112.9 | 15% | 9.0 | 8.0% |
| Burntwood town centre [4] | 42.1 | 3% | 1.8 | 4.3% |
| Brownhills | 25.0 | 1% | 0.6 | 2.4% |
| Other stores and centres [5] | 17.9 | 1% | 0.6 | 3.3% |
| Catchment area total | 85.0 | 20% | 3.0 | 3.5% |
| | | | | |
| **Clawback** [6] | | | | |
| Walsall | 396.4 | 20% | 12.0 | 3.0% |
| Cannock | 177.3 | 10% | 6.0 | 3.4% |
| Tamworth | 220.5 | 10% | 6.0 | 2.7% |
| Stafford | 267.3 | 2% | 1.2 | 0.4% |
| Burton-on-Trent | 324.9 | 3% | 1.8 | 0.6% |
| Birmingham | - | 10% | 6.0 | - |
| Out-of-centre stores | - | 10% | 6.0 | - |
| Total clawback | - | 65% | 38.9 | - |
| | | | | |
| Inflow of trade [7] | - | 15% | 9.0 | - |
| | | | | |
| **Total** | - | 100% | 59.9 | - |

[1] catchment area turnover based on expenditure growth in study area 2011-2016
[2] based on existing market shares from household survey data
[3] excluding Friarsgate scheme
[4] turnover includes comparison turnover of Morrisons extension, Aldi and LCP Hoardings site development
[5] retail warehouses in Lichfield, including Lichfield Retail Park, and local centres
[6] clawback of leakage from centres outside study area:
turnover estimates from Regional Centres Study (March 2006) assuming growth in turnover at 1.7% p.a.
[7] based on existing inflow to Lichfield city centre

## RETAIL IMPACT ASSESSMENT, COMPARISON GOODS, 2028 (in 2001 prices)

### APPENDIX 8B: PROPOSALS FOR LONGER TERM RETAIL DEVELOPMENT IN LICHFIELD
### INCLUDING FURTHER COMPARISON GOODS DEVELOPMENT ON OTHER DEVELOPMENT SITES

| | | **Friarsgate scheme** | | | **Other development sites** | | | **Cumulative** | |
|---|---|---|---|---|---|---|---|---|---|
| | comparison turnover 2028 (£m) [1] | share of trade draw [2] | trade diversion £m [8] | trading impact % | share of trade draw [2] | trade diversion £m [9] | trading impact % | trade diversion £m | trading impact % |
| **Catchment Area** | | | | | | | | | |
| Lichfield city centre [3] | 188.7 | 15% | 11.0 | 5.8% | 15% | 5.1 | 2.7% | 16.1 | 8.5% |
| Burntwood town centre [4] | 70.4 | 3% | 2.2 | 3.1% | 3% | 1.0 | 1.5% | 3.2 | 4.6% |
| Brownhills | 41.8 | 1% | 0.7 | 1.8% | 1% | 0.3 | 0.8% | 1.1 | 2.6% |
| Other stores and centres [5] | 29.9 | 1% | 0.7 | 2.5% | 1% | 0.3 | 1.1% | 1.1 | 3.6% |
| Catchment area total | 142.1 | 20% | 3.7 | 2.6% | 20% | 1.7 | 1.2% | 5.4 | 3.8% |
| | | | | | | | | | |
| **Clawback** [6] | | | | | | | | | |
| Walsall | 485.3 | 20% | 14.7 | 3.0% | 20% | 6.8 | 1.4% | 21.5 | 4.4% |
| Cannock | 217.1 | 10% | 7.3 | 3.4% | 10% | 3.4 | 1.6% | 10.8 | 5.0% |
| Tamworth | 270.0 | 10% | 7.3 | 2.7% | 10% | 3.4 | 1.3% | 10.8 | 4.0% |
| Stafford | 327.2 | 2% | 1.5 | 0.4% | 2% | 0.7 | 0.2% | 2.2 | 0.7% |
| Burton-on-Trent | 397.7 | 3% | 2.2 | 0.6% | 3% | 1.0 | 0.3% | 3.2 | 0.8% |
| Birmingham | - | 10% | 7.3 | - | 10% | 3.4 | - | 10.8 | - |
| Out-of-centre stores | - | 10% | 7.3 | - | 10% | 3.4 | - | 10.8 | - |
| Total clawback | - | 65% | 47.7 | - | 65% | 22.2 | - | 69.9 | - |
| | | | | | | | | | |
| Inflow of trade [7] | - | 15% | 11.0 | - | 15% | 5.1 | - | 16.1 | - |
| | | | | | | | | | |
| **Total** | - | 100% | 73.3 | - | 100% | 34.2 | - | 107.5 | - |

[1] catchment area turnover based on expenditure growth in study area 2011-2028
[2] based on existing market shares from household survey data
[3] excluding Friarsgate scheme
[4] turnover includes comparison turnover of Morrisons extension, Aldi and LCP Hoardings site development
[5] retail warehouses in Lichfield, including Lichfield Retail Park, and local centres
[6] clawback of leakage from centres outside study area:
turnover estimates from Regional Centres Study (March 2006) assuming growth in turnover at 1.7% p.a.
[7] based on existing inflow to Lichfield city centre
[8] assuming growth in sales density at 1.7% p.a.
[9] based on capacity for additional comparison goods development in Lichfield in 2028 (excluding bulky goods)

# APPENDIX 9

# IMPACT TABLES, BURNTWOOD

## RETAIL IMPACT ASSESSMENT, COMPARISON GOODS, 2016 (in 2001 prices)

## APPENDIX 9A: PROPOSALS BY LCP FOR RETAIL DEVELOPMENT IN BURNTWOOD

| | | LCP Burntwood scheme (Hoardings site) | | |
|---|---|---|---|---|
| | comparison turnover 2016 (£m) [1] | share of trade draw | trade diversion £m | trading impact % |
| **Catchment Area** | | | | |
| Burntwood town centre [2] | 15.6 | 1% | 0.3 | 1.7% |
| Lichfield city centre [3] | 172.8 | 20% | 5.3 | 3.1% |
| Brownhills | 25.0 | 2% | 0.5 | 2.1% |
| Other stores and centres [4] | 17.9 | 2% | 0.5 | 3.0% |
| Catchment area total | 231.3 | 25% | 6.6 | 2.9% |
| | | | | |
| **Clawback** [5] | | | | |
| Walsall | 396.4 | 20% | 5.3 | 1.3% |
| Cannock | 177.3 | 15% | 4.0 | 2.2% |
| Out-of-centre stores | - | 35% | 9.3 | - |
| Total clawback | - | 70% | 18.6 | - |
| | | | | |
| Inflow of trade [6] | - | 5% | 1.3 | - |
| | | | | |
| **Total** | - | 100% | 26.5 | - |

[1] turnover of centres in catchment area based on expenditure growth in Burntwood catchment area 2011-2016
[2] turnover includes comparison turnover of Morrisons extension and Aldi
[3] includes Friarsgate scheme
[4] retail warehouses in Lichfield, including Lichfield Retail Park, and local centres
[5] clawback of leakage from centres outside study area:
turnover estimates from Regional Centres Study (March 2006) assuming growth in turnover at 1.7% p.a.
[6] small inflow assumed (mostly from Lichfield)

## RETAIL IMPACT ASSESSMENT, COMPARISON AND CONVENIENCE GOODS, 2016 (in 2001 prices)

## APPENDIX 9B: POTENTIAL FOR INITIAL REDEVELOPMENT OF OLAF JOHNSON SITE

| | | Retail development on Olaf Johnson site | | |
|---|---|---|---|---|
| | total turnover 2016 (£m) [1] | share of trade draw | trade diversion £m [8] | trading impact % |
| **Catchment Area** | | | | |
| Burntwood town centre [2] | 36.5 | 10% | 4.0 | 10.9% |
| Lichfield city centre [3] | 180.8 | 15% | 6.0 | 3.3% |
| Tesco, Lichfield | 42.8 | 5% | 2.0 | 4.7% |
| Brownhills [4] | 68.5 | 5% | 2.0 | 2.9% |
| Other stores and centres [5] | 69.4 | 5% | 2.0 | 2.9% |
| Catchment area total | 398.0 | 40% | 16.0 | 4.0% |
| | | | | |
| **Clawback** [6] | | | | |
| Walsall | 463.20 | 20% | 8.0 | 1.7% |
| Cannock | 251.40 | 10% | 4.0 | 1.6% |
| Out-of-centre stores | - | 20% | 8.0 | - |
| Total clawback | - | 50% | 20.0 | - |
| | | | | |
| Inflow of trade [7] | - | 10% | 4.0 | - |
| | | | | |
| **Total** | - | 50% | 40.0 | - |

[1] turnovers in comparison goods from Table 9A; turnovers in convenience goods from DPP Retail Assessment for Tesco, Lichfield

[2] turnover includes Morrisons (with extension) and Aldi

[3] includes Friarsgate scheme

[4] turnover in comparison goods from Table 9A; turnover in convenience goods from Black Country Centres Study, Nov 2009

[5] retail warehouses and out-of-centre foodstores in Lichfield; and local centres in Lichfield and Burntwood

[6] clawback of leakage from centres outside study area: total turnover includes estimates for convenience goods from Black Country Centres and Cannock Chase Retail Study, adjusted to 2001 prices

[7] small inflow assumed (mostly from Lichfield)

[8] turnover based on a superstore of 4,000 sq.m. net and an overall sales density of £10,000 per sq.m.

## RETAIL IMPACT ASSESSMENT, COMPARISON AND CONVENIENCE GOODS, 2028 (in 2001 prices)

## APPENDIX 9C: PROPOSALS FOR LONGER TERM REDEVELOPMENT OF THE OLAF JOHNSON SITE

| | total turnover 2028 (£m) [1] | Olaf Johnson site share of trade draw | trade diversion £m [2] | trading impact % |
|---|---|---|---|---|
| **Catchment Area** | | | | |
| Burntwood town centre [3] | 53.4 | 5% | 2.8 | 5.3% |
| Lichfield city centre [4] | 264.7 | 15% | 8.5 | 3.2% |
| Tesco, Lichfield | 62.7 | 5% | 2.8 | 4.5% |
| Brownhills | 100.3 | 3% | 1.7 | 1.7% |
| Other stores and centres [5] | 101.6 | 2% | 1.1 | 1.1% |
| Catchment area total | 582.7 | 30% | 17.0 | 2.9% |
| | | | | |
| **Clawback** [6] | | | | |
| Walsall | 567.05 | 25% | 14.2 | 2.5% |
| Cannock | 307.76 | 15% | 8.5 | 2.8% |
| Out-of-centre stores | - | 20% | 11.3 | - |
| Total clawback | - | 60% | 34.0 | - |
| | | | | |
| Inflow of trade [7] | - | 10% | 5.7 | - |
| | | | | |
| **Total** | - | 100% | 56.7 | - |

[1] based on turnover in Table 9B and applying the rate of overall expenditure growth in Burntwood catchment 2016-2028
[2] assuming initial development as in Appendix 9C and further development based on the capacity for additional comparison goods development in Burntwood in 2028 shown in Appendix 4D
[3] turnover includes comparison turnover of Morrisons extension and Aldi
[4] includes Friarsgate scheme
[5] retail warehouses in Lichfield, including Lichfield Retail Park, and local centres
[6] turnover of centres increased using growth rate of 1.7% p.a.
[7] small inflow assumed (mostly from Lichfield)

## RETAIL IMPACT ASSESSMENT, COMPARISON AND CONVENIENCE GOODS, 2028 (in 2001 prices)

## APPENDIX 9D: CUMULATIVE IMPACT OF PROPOSALS FOR LONGER TERM RETAIL DEVELOPMENT INCLUDING THE LCP SCHEME AND THE OLAF JOHNSON SITE

| | | LCP Burntwood scheme | | | Olaf Johnson site | | | Cumulative | |
|---|---|---|---|---|---|---|---|---|---|
| | total turnover 2028 (£m) [1] | share of trade draw [6] | trade diversion £m [7] | trading impact % | share of trade draw [8] | trade diversion £m [9] | trading impact % | trade diversion £m | trading impact % |
| **Catchment Area** | | | | | | | | | |
| Burntwood town centre [2] | 53.4 | 1% | 0.3 | 0.6% | 5% | 2.8 | 5.3% | 3.2 | 5.9% |
| Lichfield city centre [3] | 264.7 | 18% | 5.8 | 2.2% | 15% | 8.5 | 3.2% | 14.3 | 5.4% |
| Tesco, Lichfield | 62.7 | 2% | 0.6 | 1.0% | 5% | 2.8 | 4.5% | 3.5 | 5.6% |
| Brownhills | 100.3 | 2% | 0.6 | 0.6% | 3% | 1.7 | 1.7% | 2.3 | 2.3% |
| Other stores and centres [4] | 101.6 | 2% | 0.6 | 0.6% | 2% | 1.1 | 1.1% | 1.8 | 1.8% |
| Catchment area total | 582.7 | 25% | 8.1 | 1.4% | 30% | 17.0 | 2.9% | 25.1 | 4.3% |
| | | | | | | | | | |
| **Clawback** [5] | | | | | | | | | |
| Walsall | 567.05 | 20% | 6.5 | 1.1% | 25% | 14.2 | 2.5% | 20.7 | 3.6% |
| Cannock | 307.76 | 15% | 4.9 | 1.6% | 15% | 8.5 | 2.8% | 13.4 | 4.3% |
| Out-of-centre stores | - | 35% | 11.4 | - | 20% | 11.3 | - | 22.7 | - |
| Total clawback | - | 70% | 22.7 | - | 60% | 34.0 | - | 56.7 | - |
| | | | | | | | | | |
| Inflow of trade | - | 5% | 1.6 | - | 10% | 5.7 | - | 7.3 | - |
| | | | | | | | | | |
| **Total** | - | 30% | 32.4 | - | 40% | 56.7 | - | 89.1 | - |

[1] based on turnover in Table 9B and applying the rate of overall expenditure growth in Burntwood catchment 2016-2028
[2] turnover includes Morrisons (with extension) and Aldi
[3] includes Friarsgate scheme
[4] retail warehouses and out-of-centre foodstores in Lichfield; and local centres in Lichfield and Burntwood
[5] turnover of centres increased using growth rate of 1.7% p.a.
[6] trade draw from Appendix 9A
[7] assuming growth in sales density of 1.7% p.a.
[8] trade draw from Appendix 9C
[9] turnover from Appendix 9C

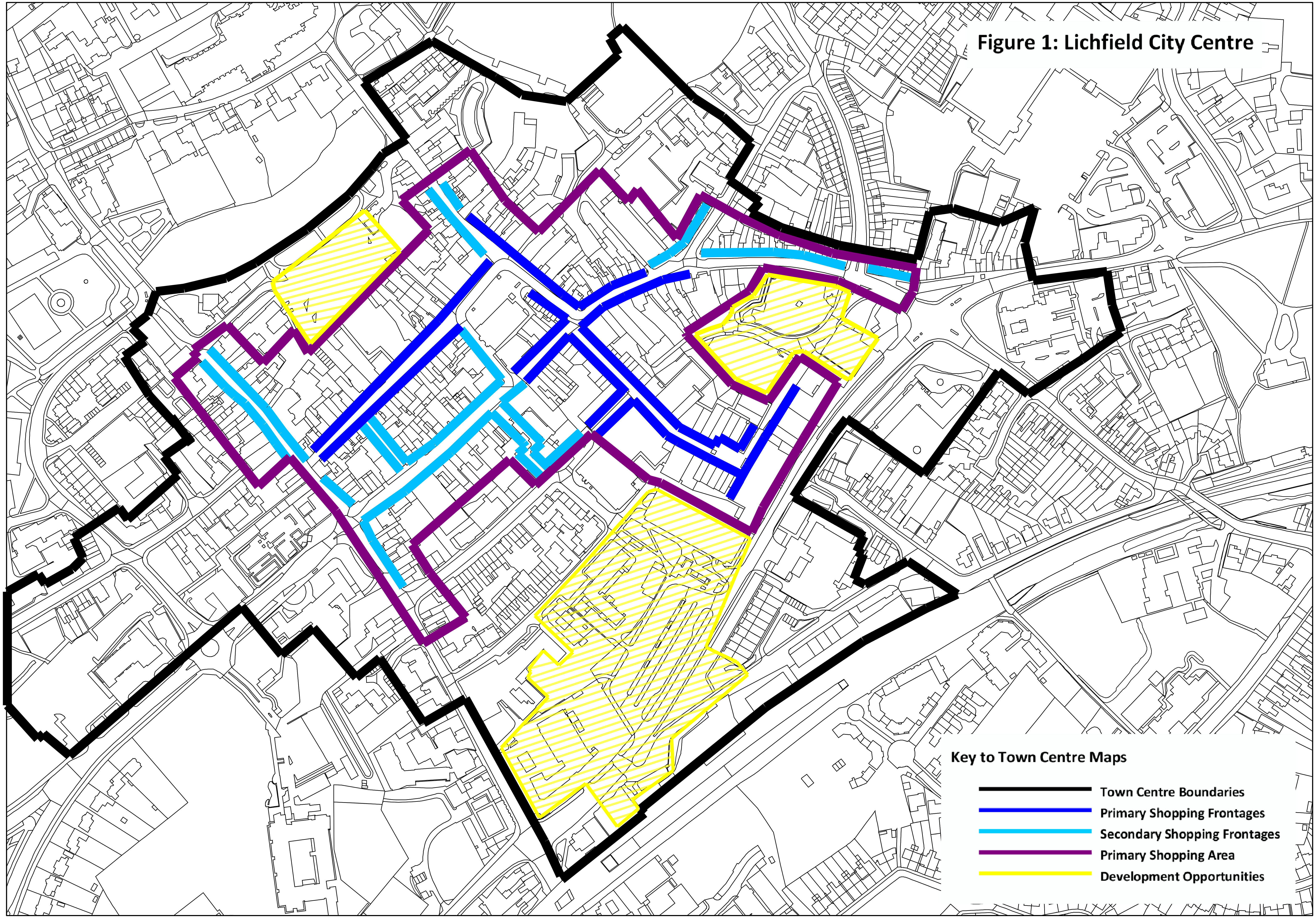
Figure 1: Lichfield City Centre
Key to Town Centre Maps
Town Centre Boundaries
Primary Shopping Frontages
Secondary Shopping Frontages
Primary Shopping Area
Development Opportunities

Figure 2: Burntwood Town Centre