# SOUTH SHROPSHIRE DISTRICT RETAIL AND LEISURE STUDY 2006 TO 2021

JULY 2007

NEMS market research
ticking all the right boxes

White Young Green

South Shropshire District Council

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## 1.0 SCOPE AND PURPOSE OF THE STUDY

1.1 South Shropshire District Council has commissioned this Study from White Young Green Planning (WYG) to advise on the future retail and leisure strategy for the network of centres in the District. In terms of the network and hierarchy of centres within the District, the principal centres are: Bishop's Castle; Church Stretton; Cleobury Mortimer; Craven Arms and Ludlow.

1.2 The Study assesses the vitality and viability of Bishop's Castle, Church Stretton, Cleobury Mortimer, Craven Arms and Ludlow (the five centres) and the future retail need in those centres over the period 2006 to 2021.

1.3 The Study has regard to the advice on such assessments set out in Planning Policy Statement 6 (2005) 'Planning for Town Centres'.

1.4 The Study includes an in-depth analysis of the retail and leisure provision in the five centres, assessment of the extent to which the centres are meeting the retail and leisure needs of the local area population and the role of the centres in the local shopping network and the sub-regional shopping hierarchy.

1.5 The findings of the Study are intended to assist retail policy formulation in preparation of Development Plan Documents for the South Shropshire Local Development Framework; the Study identifies any need for the Council to plan for new retail floorspace over the period to 2021. The Study is a material consideration in determining planning applications for retail and leisure development within the South Shropshire administrative area.

1.6 The purpose of this Study is to:

- Assess the quantitative 'need', or expenditure capacity, for further convenience and comparison retail floorspace in the five centres. In the first instance, the retail need should be met in the defined shopping areas of the town centres, and then elsewhere in the town centres.

- Assess any qualitative deficiencies that may exist in South Shropshire's existing retail and leisure provision;

- Assess the vitality and viability of the town centres; and

- From the above, make broad recommendations on appropriate retail and leisure strategies, including considering the ability of commitments, allocations and sites available or likely to come forward to meet the identified capacity for additional floorspace.

# 2 CURRENT AND EMERGING RETAIL AND LEISURE TRENDS

**Introduction**

2.1 The retail property landscape across the UK has changed significantly over the past 50 years, from post-war redevelopment in town centres, through to the emergence of the retail warehouse park and out-of-town regional shopping malls.

2.2 During this time, the retail and leisure sectors have experienced considerable growth. Spending on retail goods has significantly increased over the past decade, particularly spending on comparison (or non-food) goods. This growth in spending is attributable to a number of factors, including greater disposable income, cheaper prices and new technology.

2.3 The retail market is continually changing as a result of shifts in demographics, increasingly restrictive planning policies and technological advancements, such as e-tailing. These changes are having an impact on the format of retail and leisure floorspace. Research undertaken by British Council of Shopping Centres ('Future of Retail Property, 2006/7') identified that for the period 1999 to 2005 the proportion of new retail space that was developed in UK town centres rose to 35%. This reflects the Government's 'town centres first' approach.

**Trends in Comparison Goods Shopping**

2.4 Whilst it is anticipated that over the next ten years the growth in retail spending will slow down, there will continue to be significant growth in retail expenditure, particularly on comparison goods. Research undertaken by BCSC identifies that there will be a need for more than six million square metres (gross) of additional comparison goods floorspace in England and Wales between 2006 and 2015, although this does not take into account developments in the pipeline. This represents an increase of approximately 10% on the 2005 stock.

2.5 There is increasing impetus from retailers to achieve more efficient use of floorspace, particularly given the recent poor performance of many national multiples; many of which have been affected by the significant increase in e-tailing. As a consequence of the recent performance retailers are more reluctant to commit to many schemes in contrast with previous decades. Instead, retailers are being more selective in choosing schemes that are appropriate in terms of location and the types of premises provided. Indeed, retailers are seeking to occupy larger units in order to achieve more efficient use of floorspace and attract shoppers from a wider area. These larger floorplates enable retailers to provide a greater range of goods.

2.6 International market conditions and price deflation in some key sectors means that many high street names are becoming increasingly vulnerable to takeovers. Similarly, due to increased competition there have been a number of high profile losses from the high street, including Littlewoods and Music Zone.

2.7 There will continue to be demand for larger, more modern retail units in the future, although increased sensitivity over future viability will mean a cautious approach to new investment for many key national retailers. Marginal locations within centres will be increasingly rejected. However, many national retailers are now looking at smaller/ lower order centres in order to increase their market share. Many investment decisions will be influenced by the scale of commitment from other retailers; developers will increasingly need to promote large town centre redevelopment schemes if they are to attract high quality retailers.

**Trends in Food Retailing**

2.8 In the aftermath the growth in the number of edge and out-of-centre large format supermarkets during the 1990s, development of such facilities is now more limited due to stricter planning laws, following the adoption of PPS6, and a lack of suitable sites. As a result, the national multiples in the food retailing sector are finding a range of other measures to improve their market share. These include:

- Offering a wider product range, such as financial and insurance products, petrol and non-food goods;
- Developing a wider range of outlets, for example small-format convenience stores in town centres (e.g. Tesco Express), smaller supermarkets mostly in town centres (e.g. Tesco Metro), superstores (e.g. Tesco) and hypermarkets (e.g. Tesco Extra);
- Extended opening hours;
- Offering cheap products and no-frills service;
- Providing an attractive and powerful brand image; and
- Offering a home delivery service.

2.9 Nevertheless, Verdict (2007) notes that supermarkets increased their combined floorspace by some 294,400 sq m in 2006, which is more than double the amount added in 2005. Tesco has been particularly prolific by aggressively targeting space as a means to boost sales. The closure in 2006 of a planning loophole regarding mezzanine floors led to a rush of floorspace expansions in supermarkets prior to this time. However, Tesco is still expected to increase its UK floorspace by around 6% in 2007/08, with ASDA, Sainsbury's, Morrison's, Waitrose, Marks and Spencer's and Iceland all set to open new stores. Growth at the discounter end of the market is more limited however, and notably in 2007 Kwik Save spent a period of time in administration.

2.10 In terms of products, major areas of growth in the convenience market have been fair trade and organic produce, with customers willing to pay higher prices for food with the expectation of better quality produce and more ethical practices in production and supply.

2.11 The number of forecourt convenience stores, once popular with consumers, is now declining due to static fuel sales and high operating costs. Although there are currently around 10,400 forecourt convenience stores in the UK this forecast to fall to around 8,500 by 2010 (UK Forecourt Retailing, IGD, 2005). Notwithstanding this the average floorspace of forecourt stores is increasing as all the major retailers continue to open and expand such operations to supplement their existing store networks.

2.12 Farmers markets and specialist firms offering a home delivery service, for example organic food, are small-scale operations that are growing in popularity.

**Growth in E-tailing ('E-commerce')**

2.13 Many consumers who previously shopped in town centres and at retail parks are now using the internet for some of their purchases. This trend is set to continue, although the exact impact that e-commerce will have on the high street has yet to be fully established. However, the rise in the UK in recent years of e-commerce has impacted upon retailers, developers and investors alike. As access to the internet/ online shopping continues to grow through digital televisions and mobile phones, proportionally less money is anticipated to be spent in the high street or at retail parks. Research undertaken by BCSC indicates that online sales will account for almost 11% of total retail spend by 2015. It is predicted that in some sectors this market share will be much higher, such as CDs and DVDs, where the market share achieved by online sales could increase to up to 50%.

2.14 The success of internet shopping is having an impact upon traditional high streets, in light of increased competition and lower prices. Consequently, there is a strong possibility that online retailing will put some pressure on retail rental growth over the next five to ten years, but is unlikely to impact on capital values. Research by BCSC identifies that 'large' and 'very large' shopping centres (of over 40,000 sq m) are deemed almost immune from the impact of online shopping as they offer the complete day out. Although as the size of the shopping centres decreases, it is more likely that there will be greater adverse effects. Indeed, within small shopping centres (sized between 5,000 – 20,000 sq m) it is likely that the growth of online shopping could reduce turnover notwithstanding growth in disposable income.

2.15 Furthermore, there is some evidence to suggest that the increase in e-commerce is impacting not just on high street sales, but also on the inclination of retailers to expand their 'bricks and mortar' outlets (BCSC, 2006). However, retailers are optimistic as they envisage a continued demand for physical stores and, for most, store sizes are likely to remain the same. Significantly, more retailers ranked physical stores first, ahead of all other current channels of retail distribution, and this is a pattern that they envisaged continuing. Retailers see e-tailing as another channel of distribution (BCSC, 2006).

2.16 As a consequence of the likely increase in e-tailing, retailers will increasingly have to adapt their stores to create more experience led environments. However, the increase in 'virtual' floorspace could result in a decrease in the level of innovation and number of new concepts and formats in the high street and in shopping centres.

2.17 Despite all these different assumptions with regard to the future affect of online shopping, it is considered that e-tailing will not replace the shopping experience as shopping is a social activity. Online shopping is very much seen as a complementary tool to support retail sales from physical destinations (BCSC, 2006).

**Trends in Leisure**

2.18 Leisure is the most rapidly expanding sector of the UK economy and has experienced dramatic changes and growth during the last decade. Trends in the main commercial leisure sectors are explored below.

<u>Cinemas</u>

2.19 During the mid-1990s the established multiplex cinema operators undertook a rapid expansion programme throughout the United Kingdom. The operators moved away from their traditional City Centre locations and opened large 'category killer' cinemas (usually between 12-16 screens). This expansion marked the advent of the out of town leisure park as other leisure operators sought to locate adjacent to the cinemas, believing there was a natural synergy between the uses. This in turn fuelled the expansion in health & fitness and revived the interest in bowling centres.

2.20 The cinema operators had traditionally expanded on a piecemeal basis, usually by acquiring their own freehold site. In order to realise the proposed rapid expansion the operators had to sign up to institutional leases with high rents. Operators quickly realised that these rental levels were unsustainable and that the industry was reaching saturation level and could not sustain any further large developments. This was coupled with the downturn in cinema attendances, primarily as a result of limited 'blockbuster' movies.

2.21 As a consequence, operators slowed down their acquisition programmes, although two companies were borne out of this, namely Cine UK and Spean Bridge, who identified that there was a need for multiplex cinemas in medium-sized towns, without existing cinema provision; a reduced attendance capacity would be provided commensurate with the size of the settlement. Many developers were left with sites with leisure permissions and no operator of any strength; in reality they needed a cinema to anchor the scheme and attract associated uses. Therefore, the likes of Cine UK undertook a relatively unchallenged expansion throughout the United Kingdom, cherry picking the opportunities that were available and driving extremely hard financial transactions. This had a substantial impact on the developer's residual valuation and in many cases prevented sites earmarked for leisure development progressing.

2.22 More latterly, acquisition of cinemas has been at a corporate level with the main operators pursuing company acquisitions. The two most active operators in the United Kingdom currently are Vue and Cineworld.

Health and Fitness

2.23 At the same time as cinema expansion, the concept of the modern large private members health and fitness club was realised and there then followed expansion throughout the country; examples include Esporta and Greens. This particular market has reached saturation point with operators now opening few new health clubs and expansion tending to occur through company acquisition. As the concept evolved, and in common with developments in the cinema industry, certain operators recognised the need for representation in towns not previously served (generally medium sized towns) and the likes of Fitness First and LA Fitness progressed acquisition programmes based on smaller units.

2.24 More recently, two operators entered the market to compete aggressively, namely Total Fitness, whose philosophy is to construct large health clubs with lower membership fees and JJB Sports, who have pioneered their concept of a ground floor health & fitness club with mezzanine level retail, primarily situated on retail parks.

2.25 With regard to swimming pool provision, it is generally only the larger health and fitness clubs in higher order centres that will provide such facilities. There is a critical catchment population and attendance required to support commercial swimming pools and small and small to medium sized centres are not generally of a size which is sufficient to justify such investment.

Bowling

2.26 Bowling centres have long been a traditional place of family entertainment. The concept had never been updated although various operators tried to expand the concept to a family entertainment centre; a combination of several complementary leisure uses under one roof. This concept failed but did revive interest in upgrading the bowling centre offer.

2.27 There is still only a handful of bowling centre operators seeking to expand, the best known of which is Hollywood Bowl. A number of strong original operators are undertaking expansions throughout the United Kingdom.

2.28 As with the cinema market, the fit out costs of bowling centres are extremely high and therefore they do tend to negotiate transactions whereby they receive substantial amounts of up front cash from the developer. The other criteria for bowling centre operators is synergy with adjacent users, in particular cinemas and the operators prefer sites with large amounts of free car parking.

2.29 Mintel notes that the popularity of bowling has declined in recent years, and it is anticipated that this trend will continue. Bowling has undergone a shift in patronage in recent years, with attendees now more likely to be part of group visiting the location for mixed leisure activities rather than solely for ten-pin bowling. However, although demand for bowling is likely to be restricted, demand for the expansion and refurbishment of existing venues may increase. Bowling centres have opened historically in medium sized towns and larger higher-order centres. There is a critical catchment population required to support such facilities and operators will not consider small or small to medium sized towns as suitable opportunities for new development.

Bingo

2.30 Bingo has been well represented over many years. Initially operators located themselves in town centre sites. Operators now have a preference to locate on freestanding edge-of-town locations with free customer car parking. Of all the leisure operators, bingo is seen to be the less concerned about clustering with other leisure operators as the concept seems to be able to trade very successfully on its own. Although bingo participation, particularly amongst the younger generations, has increased in recent years the forthcoming smoking ban is likely to affect future expansion in this sector, at least in the short term. The smoking ban in place in Scotland has affected trading performance considerably.

Restaurants

2.31 This sector also expanded to mirror the cinema expansion and was effectively split into two offers, namely out-of-town situated on leisure parks and the more traditional town centre offer.

2.32 The leisure park offer ultimately either performed poorly or reached a saturation level and now there are a few restaurant operators, such as Pizza Hut, Frankie & Bennys and Nandos, who are actively acquiring units in these locations.

2.33 Within the town centre restaurant offer, this in many ways has mirrored the trend of the edge-of-town/ out-of-town operators with many having reached saturation level in town and city centres. There has also been a noticeable lack of 'new entrants' into the sector and therefore over and above the established national names such as Pizza Hut, McDonald's, and Chiquito it is the strong independents such as The Living Room, Croma and Piccolinos taking vacant space in city centres.

Public Houses

2.34 The public house operators can effectively be split into three sectors; edge-of-town on leisure parks; edge-of-town standalone on busy arterial roads; and town centre.

2.35 Many operators jumped onto the success of the edge-of-town leisure development. However, it became apparent that this concept would not work for the public house operators. As a consequence the expansion on such schemes is extremely limited.

2.36 The operators remain extremely keen on the potential to acquire sites on a freehold basis in good suburban areas and on prominent main roads and often will combine their requirement with a budget hotel operator if possible.

2.37 In the town centre market, again due to corporate acquisition of companies, there is a very limited amount of new entrants.

# 3 METHODOLOGY

## Survey Data

3.1 Empirical data form the basis of the Study. As part of the Study, the following surveys were commissioned.

*Telephone Survey*

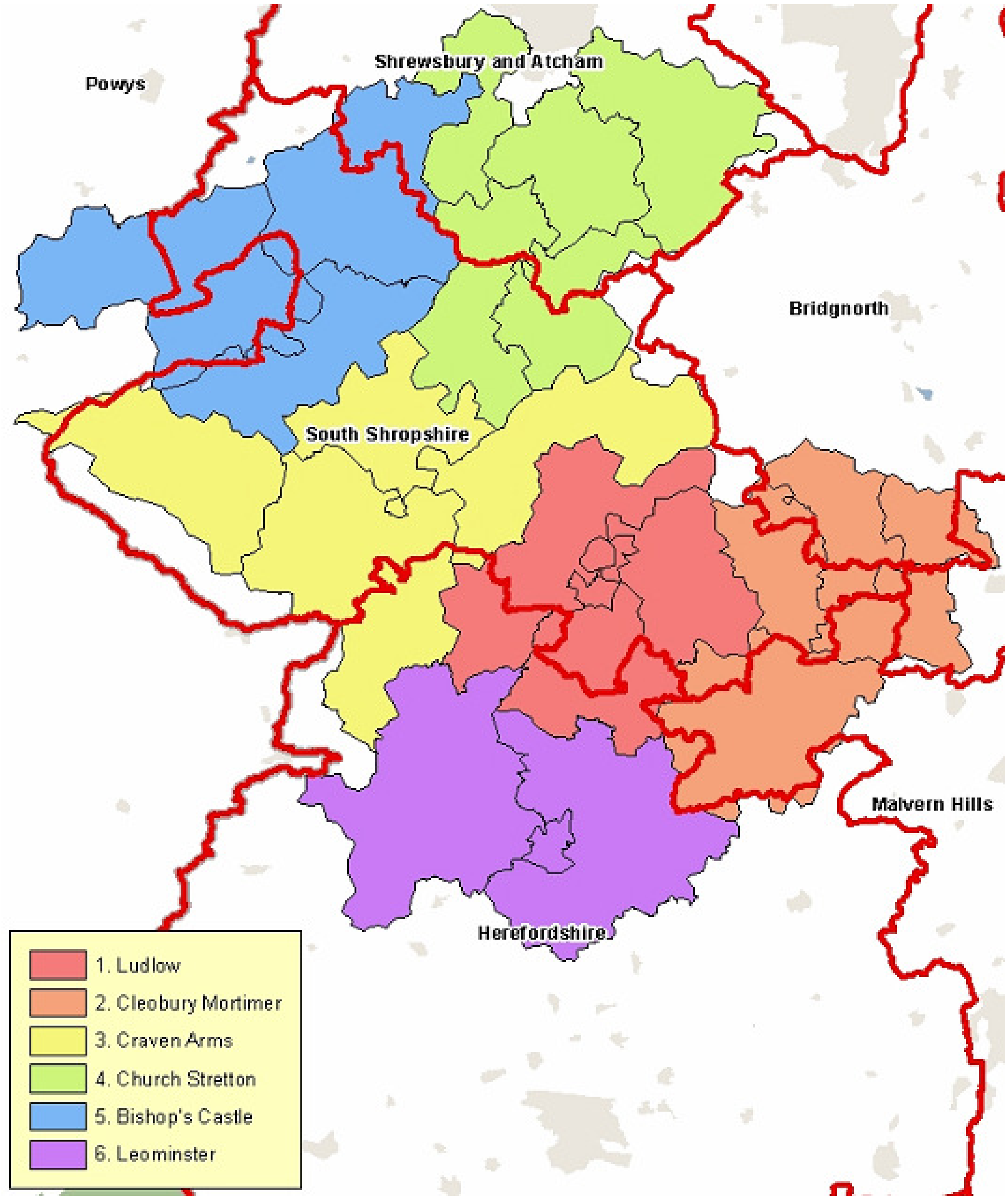
3.2 A telephone survey of 600 households in the South Shropshire Area was undertaken by NEMS Market Research in December 2006. An additional 100 survey results, taken from the household survey completed for the Bridgnorth Retail Study in February 2006, were also included, which brought the total number of household surveys conducted in the Study Area to 700. WYG has discussed extensively with NEMS, and other market research companies including MORI, the appropriate quantum of interviews to undertake in a household survey. The industry-standard is that a minimum of 100 interviews per sub-area is required. This minimum requirement is achieved in this Study. The justification behind this is that there is a need for at least 100 interviews in each sub-area to ensure that there is no bias in the findings, which could occur, were a lesser number of interviews undertaken.

3.3 NEMS undertook the telephone survey in six survey zones. The Study Area and survey zones are shown on the plan at **Appendix 1** and overleaf in Figure 3.1. The number of household surveys conducted in each of the survey zones is as follows: Ludlow – 100 surveys; Cleobury Mortimer & Rural East – 200 surveys; Craven Arms – 100 surveys; Church Stretton and Rural North – 100 surveys; Bishop’s Castle – 100 surveys; and Leominster – 100 surveys. The survey zones and post-code sectors within the zones comprise:

1. *Ludlow - SY8/1, SY8/2, SY8/3, SY8/4*
2. *Cleobury Mortimer & Rural East – DY14/9, WR15/8, DY12/3, DY14/0, DY14/8*
3. *Craven Arms – SY7/0, SY7/8, SY7/9*
4. *Church Stretton and Rural North – SY6/6, SY6/7, SY5/6, SY5/7, SY5/8*
5. *Bishop’s Castle – SY15/6, SY5/0, SY9/5*
6. *Leominster – HR6/8, HR8/9, HR6/0*

3.4 The Study Area extends beyond the South Shropshire District boundary as the sphere of influence of the District, and particularly that of Ludlow, extends beyond the District boundary. It extends into parts of Shrewsbury and Atcham Borough, Herefordshire County, Bridgnorth District, Wyre Forest District, Malvern Hills District and Powys County. The Cleobury Mortimer and Rural East Area includes survey data from the Bridgnorth Retail Study (2005), and the wider catchment area adopted reduces the perceived importance in this area of Cleobury Mortimer as a destination.  However, the wider catchment area ensures that the Study is as robust as is possible and in the statistical analysis of centres' performances, there is not implication of having adopted a wider catchment area.

**Figure 3.1: The South Shropshire Study Area**




3.5 The telephone survey is designed to yield data on convenience and comparison shopping patterns and leisure activity in the South Shropshire area, and to determine residents' perceptions on the quality of shopping and leisure provision available.  The tabulated results of the household survey are contained at **Appendix 2**.

*In-Street Survey*

3.6 Between November and December 2006 NEMS conducted an in-street survey of 398 visitors to the five towns comprising: 57 in Bishop's Castle; 62 in Church Stretton; 60 in Cleobury Mortimer; 59 in Craven Arms; and 160 in Ludlow.

3.7 This in-street survey is designed to yield data on perceptions of the town centres, frequency of visit and the main purposes for which the town centre is used, particularly with regard to shopping and leisure habits. The tabulated results for the in-street survey are contained at **Appendix 3**.

*Pedestrian Flow Counts*

3.8 The Retail Study is informed by a pedestrian flow survey undertaken by NEMS. NEMS recorded the pedestrian flow at a number of count points in each of the five centres, to inform the vitality and viability assessments. The tabulated results of the pedestrian counts are included at **Appendix 4**. The count points used in each of the five centres were:

Ludlow

1) Outside Tesco, Corve Street
2) Elsewhere in Corve Street
3) King Street
4) Castle Street
5) Market Street

Bishop's Castle

1) Outside Harry Tuffin's, Church Street
2) Outside HSBC, High Street

Cleobury Mortimer

1) Spar, Church Street
2) Outside Harry Tuffin's

Craven Arms

1) Outside Post Office, Corvedale Road
2) Outside Harry Tuffin's entrance, Shrewsbury Road

Church Stretton

1) Outside Co-op, Lion Meadow
2) Outside Spar, Sandford Avenue

*Town Centre Business Surveys*

3.9 South Shropshire Council and WYG, together with: the Bishop's Castle Business Network; the Church Stretton Chamber of Trade; the Cleobury Mortimer Chamber of Trade; the Craven Arms Business Network; and the Ludlow Chamber of Trade and Commerce, conducted a survey of all commercial businesses in the town centres. The business surveys are undertaken so as the views of the broadest cross-section of society are obtained; responses obtained from businesses are often quite different to the responses obtained from shoppers using those businesses. The response rates were: Bishop's Castle - 62%; Church Stretton - 41%; Cleobury Mortimer - 41%; Craven Arms - 41%; and Ludlow - 20%. A tabulated summary of findings is included at **Appendix 5**.

## Assessing the 'Vitality and Viability' of the Town Centre

3.10 Indicators of vitality and viability, set out in Paragraph 4.4 of PPS6, are used as a basis for the assessment of the well being of the town centre. These indicators are as follows:

- **Diversity of main town centre uses (by number, type and amount of floorspace)**: An Experian Goad land use plan is used to assess the diversity of uses in the Ludlow, with OS based plans based on WYG site surveys used for Bishop's Castle, Church Stretton, Cleobury Mortimer and Craven Arms (**Appendix 6**);
- **The amount of retail, leisure and office floorspace in edge-of-centre and out-of-centre locations**: WYG includes all large-scale retail and leisure floorspace in the South Shropshire area in the assessment;
- **The potential capacity for growth or change of centres in the network**: WYG has considered the opportunity for the town centres to expand, including as a response to increases in population and year-on-year increases in disposable income and considering the scope for more intensive development on previously developed land;
- **Commercial Operator representation and intentions to change representation**: derived from the land-use surveys, town centre business surveys (Appendix 5) and in Ludlow FOCUS reports for outstanding retailer demand (**Appendix 7**);
- **Shopping rents**: the average Zone A rents paid in centres, derived from published VOA data, where available;
- **Proportion of vacant street level property**: derived from the land-use surveys and Goad data;
- **Commercial yields on non-domestic property (i.e. the capital value in relation to the expected market rental)**: derived from VOA data;
- **Pedestrian flows**: from pedestrian counts;
- **Accessibility**: from in-street surveys, visitor survey responses and form WYG site visits;

- **Customer and residents' views and behaviour**: from in-street surveys, visitor surveys and the household survey;
- **Perception of safety and occurrence of crime**: from in-street surveys and business survey responses; and
- **State of the City/town centre environmental quality**: from in-street surveys, business survey responses and WYG site visits.

3.11 The completed vitality and viability assessments are included in Section 4 of this Study.

## Calculating Quantitative 'Capacity'

*Retail - Convenience and Comparison Goods*

3.12 The Study is undertaken using a goods-based methodology, i.e. the sale of goods by type (convenience and comparison) as advocated by PPS6.

> ***'local planning authorities should assess the likely future demand for additional retail...floorspace, having regard to a realistic assessment of…forecast expenditure for specific classes of goods to be sold, within the broad categories of convenience and comparison goods'. [Paragraph 2.34]***

3.13 Household survey data is used to calculate the market shares (the proportion of expenditure directed to a centre/retail destination within any given Study Area) for the town centres, and freestanding destinations in the South Shropshire area. Market shares are projected forward to 2011, 2016 and 2021 in order to assess the future short, medium and long term 'expenditure capacity'. The statistical tables are contained at **Appendix 8**. The population within each postal code zone has been calculated using Experian MicromarketerG3 data (2004 estimate). The population has then been projected forward using Shropshire County Council population projections for the South Shropshire administrative area. For the part of the Study Area that covers Bridgnorth District, proportional projections for the Bridgnorth administrative area are used. These are derived from ONS data, are 2004-based and are projected forward on an interpolated basis.

*Expenditure from Outside of the Study Area*

3.14 The Study Area adopted in the Retail Study is drawn so as to include the great majority of shoppers who use destinations in the South Shropshire District for convenience and comparison shopping. A proportion of turnover, generated by visitors and those passing through the District, will be drawn from outside of the Study Area. It is likely that the great majority of this inflow of expenditure is incidental to travel; such inflow is common to most destinations. This inflow is likely to be *de minimis* and, accordingly, no allowance is made in the statistical assessment.

*Capacity Projections*

3.15 Capacity figures are given for 2011 as this is five years from the base date of the Study and for 2016 and 2021, giving medium and long term considerations of capacity; a five year time span is advocated at paragraph 3.10 of PPS6 as being appropriate for considering the 'need' for additional retail floorspace in respect of development proposals:

> ***'The need for additional floorspace should be assessed no more than five years ahead, as sites in centre may become available within that period. Assessing the need beyond this time period might pre-empt future options for investment in centres, except where large town centre schemes are proposed and where a longer time period might be appropriate to allow for site assembly' [Paragraph 3.10]***

3.16 The 2011 capacity figure is a useful guide as to whether South Shropshire District Council needs to allocate sites for new retail development as part of the process of preparing its Development Plan Documents. Decisions over planning applications should be in accordance with the Development Plan Documents, unless material considerations indicate otherwise. Accordingly, it is important that the Development Plan Documents have a clear strategy for retail and leisure development over the period which they cover.

3.17 The Study is an important material consideration in Development Control decisions. In accordance with national planning guidance on the location of new retail development, the quantitative 'capacity' identified should be accommodated within town centres prior to other sites being considered. For sites outside town centres to be acceptable, it will be necessary to demonstrate that there are no alternative sites within town centres to meet any identified need, where centres are in the catchment area of a proposed development.

3.18 The advice is that medium and longer term capacity identified in this Study (over the periods to 2016 and 2021) should be viewed with some caution and it is not intended that it be satisfied on out-of-centre sites (unless there is good reason to do so) because this may prejudice future town centre opportunities that are yet to become available, but may become available beyond 2011.

*Market Share Calculations*

3.19 Market share is calculated by applying the survey results, by sub-zone, to local expenditure estimates derived from Experian MicromarketerG3. For convenience retail goods, expenditure is broken down into:

- 'main-convenience' (shoppers' usual destinations for bulky convenience shopping); and
- 'top-up convenience' (shoppers' usual destinations for top-up shopping, undertaken in-between bulk convenience shopping trips).

3.20 For comparison retail goods, the exercise is undertaken on the basis of 'non-bulky' goods (clothes and shoes, other household goods) and 'bulky' goods (Furniture and Carpets, Electrical and DIY). For the purposes of the statistical analysis, the market shares are combined into overall 'convenience' and 'comparison' capacities in line with Government guidance in PPS6.

*Growth Rates*

3.21 In estimating future 'capacity', the spending power of the catchment population is projected forward on the basis of forecast growth rates as contained in Experian Retail Planner Briefing Note 4.0 (October 2006). The growth rates in the Experian Retail Planner Briefing Note are national averages, nut it should be borne in mind that these are applied to actual demographic data (on convenience and comparison retail spending patterns) for each of the zones within the catchment area. Although the growth rates are derived nationally, they are projecting forward actual conditions recorded most recently.

3.22 In terms of convenience goods, Experian identifies a forecast growth rate of +0.7% per annum between 2006 and 2015 (Table 3.2 of Retail Planner Briefing Note 4.0). For the purposes of this study this forecast growth rate has been utilised up to 2021. For comparison goods, Experian identifies different forecast growth rates for bulky and non-bulky comparison goods (including DIY goods). In this respect, the forecast growth rates are: +2.6% per annum for DIY goods; +4.2% for bulky goods; and +3.6% for non-bulky goods. Where appropriate these forecast growth rates have been applied.

3.23 Whilst these forecast growth rates are based on an average for the UK as a whole, it is likely that the growth rate within rural areas such as South Shropshire will be less. Despite this these forecast growth rates have been used as these are the most accurate predictions available for spending growth in rural areas.

3.24 Scope is incorporated in the calculations to allow existing town centre floorspace to improve its trading performance by 1.5% per annum (comparison retail floorspace only), through floorspace efficiencies. This is a means of safeguarding and enhancing town centre vitality and viability in line with Development Plan strategies. There is no set rule for taking into account improved floorspace efficiencies and, indeed, individual retailers or centres may have aspirations to increase efficiency at rates in excess of 1.5%/annum. This Study adopts conservative estimates for the growth in per capita expenditure. Accordingly, it is reasonable to adopt relatively conservative estimates for increases in floorspace efficiency. 1.5% is an appropriate, and conservative, estimate of increases in floorspace efficiency.

*Internet Shopping*

3.25 The Household Survey records the extent to which residents of the Study Area, for convenience and comparison shopping, use the Internet. The capacity assessment adopts a constant market share approach throughout (i.e. the market share of each destination is applied to the total expenditure available at 2011, 2016 and 2021). Internet shopping is addressed in the same manner. It is assumed that Internet shopping purchases will continue at the same rate; overall spending on convenience and comparison goods using the Internet will increase, but the market share will remain constant.

3.26 It is noted that residents in rural areas may have a greater propensity to shop over the internet due to the lack of a large range of shopping facilities located in close proximity. Notwithstanding this, South Shropshire contains a large proportion of older residents (aged 45 and over) who constituted over half (52.8%) of the District's population at 2005 mid-year estimates based on information provided by Shropshire County Council (Information Sheet P8/9/SS). It is this age group who are the least likely to undertaken purchases of goods online; research my Mintel and others has identified that the over-45s are far less likely to purchase goods using the Internet than those in the under-45 age range.

*Sequential Approach*

3.27 PPS6 (Paragraph 2.41) sets out that the need for new retail floorspace should be met in locations in appropriate existing centres. On this basis, the assessed 'need' for additional retail floorspace in the towns includes growth in spending pro rata to the market share of out-of-centre retail facilities, with that growth allocated to the nearest town centre. This need should be met in the first instance by new retail floorspace in the town centre and not by new edge of centre or out of centre retail floorspace. Under the terms of national planning guidance, all new retail development should be directed to town centres in the first instance. PPS6 indicates that this principle is applicable equally to bulky goods.

> ***'…it will not be sufficient for an applicant to claim merely that the class of goods proposed to be sold cannot be sold from the town centre'. [Paragraph 3.16]***

3.28 Ludlow is the principal shopping destinations in the District. The town centre should be the principal location for new retail and leisure development. Investment should also be channelled to the other towns in the administrative area and growth in spending elsewhere in the District should be satisfied by new retail and leisure facilities in the other towns. However it is recognised that in rural areas, such as South Shropshire, rural freestanding stores are an important feature of the local community, reducing the need for residents to travel large distances by car to buy essential comparison and convenience goods. Such facilities are particularly important for the elderly and those with limited mobility and limited access to private transport. Consequently it should be a secondary aim of the Council to support stores in rural areas, outside of defined centres, in the interests of social inclusion.

3.29 It is an optimum aim for the town centres to attract the majority of the expenditure growth, which is apportioned to them when applying current market share. However, as highlighted by paragraph 3.28 above stores in rural areas away from town centres are important to rural communities. In light of this the Council should seek to direct some of this expenditure growth towards rural areas within the aim of supporting rural communities and supporting village stores and service facilities such as Post Offices. This could come about through significant qualitative improvements in the current retail offer, which should be an aspiration of the Council. Farm shops are present throughout South Shropshire as a result of farm diversification. These facilities also play a key role in supporting rural communities and should be sustained and enhanced with Council support where possible.

*Leisure*

3.30 In urban areas, it is common for retail and leisure studies to undertake a commercial leisure assessment in the same manner as retailing. The Leisure assessment is normally undertaken in four key commercial leisure sectors: Bingo; Cinema; Health and Fitness; and Ten-Pin Bowling. However, in rural areas there is little value in undertaking such commercial assessments where the majority of, or in some cases all, leisure visits for such activities are made to destinations outside of the authority area and rural areas do not have the critical mass of population necessary for operators to be attracted away for developing in high-order centres.

3.31 It was agreed with the Council at the outset of the South Shropshire District retail and leisure study commission that WYG would, instead of assessing quantitative need in discreet leisure sectors, consider the qualitative offer in the District. WYG agrees with this approach towards assessing leisure facilities in the District. However, an indication is provided of the thresholds required to support Bingo, Cinema, Health and Fitness and Ten-Pin Bowling facilities.

### Qualitative Retail Need

3.32 In addition to any quantitative retail need, there may also be a qualitative need for new retail or provision. This is informed by the household survey, which will identify the extent to which, in the convenience retail sector, retail facilities are overtrading and where shopping expenditure is leaking from the Study Area to destinations outside of it. The in-street survey too, seeks to identify any qualitative deficiencies in existing provision as perceived by visitors to the town centre. The analysis of need for additional retail floorspace takes into account any qualitative deficiency in existing provision, in advising appropriate strategies for future development.

# 4 VITALITY AND VIABILITY ASSESSMENTS

## Introduction

4.1 This section of the Study assesses the vitality and viability of the defined town centres within South Shropshire District:

- Ludlow Town Centre;
- Bishop's Castle Town Centre;
- Church Stretton Town Centre;
- Cleobury Mortimer Town Centre; and
- Craven Arms Town Centre.

4.2 A 'health-check' for each centre / retail destination has been undertaken in accordance with the guidance contained in Planning Policy Statement 6 (PPS6) – 'Planning for Town Centres' (March 2005). Paragraph 3.10 of this Study identifies the key health-check indicators.

4.3 Due to the modest size of the smaller centres in the District (Bishop's Castle, Church Stretton Cleobury Mortimer and Craven Arms) no information on rents and yields is available.

4.4 Our assessments are informed by a combination of 'desk based' research, 'on the ground' observations and utilisation of empirical research (i.e. household survey, in-street survey and business survey).

4.5 As Ludlow Town Centre is the largest centre in retailing terms, it is analysed first.

## Ludlow Town Centre

### Ludlow's position within the Regional Hierarchy

4.6 Figure 4.1 below illustrates Ludlow's position within the hierarchy of town centres in the surrounding area, by reference to the Management Horizons Europe's (MHE) UK Shopping Index (2003/2004). This ranks the top 1,672 shopping venues in the UK including town centres, stand alone malls, retail warehouse parks and factory outlet centres, through a weighted scoring system which takes account of each location's provision of multiple retailers and anchor store strength.

**Figure 4.1: The Sub-Regional Shopping Hierarchy**

| Centre | MHE score | Type of centre | Rank 2003-2004 | Rank 2000-2001 | Change in Rank |
|---|---|---|---|---|---|
| Worcester | 175 | Regional | 54 | 53 | -1 |
| Hereford | 156 | Regional | 77 | 90 | +13 |
| Shrewsbury | 150 | Regional | 86 | 62 | -24 |
| Kidderminster | 113 | Sub-Regional | 156 | 169 | +13 |
| Leominster | 27 | Minor District | 685 | 739 | +54 |
| **Ludlow** | **25** | **Minor District** | **743** | **670** | **-73** |
| Bridgnorth | 21 | Minor District | 863 | 614 | -249 |
| Stourport-on-Severn | 24 | Minor District | 773 | 775 | +2 |

Management Horizons Europe: UK Shopping Index (2003/2004)

4.7 Figure 4.1 indicates that at 2003/2004 Ludlow Town Centre was ranked 743rd out of the 1,672 shopping centres within the UK, which places it in the top 50% of all UK shopping venues. It achieves a score of 25 based on the number and type of multiple retailers present in the town centre. At the time of the 2000/2001 MHE Index Ludlow was ranked 670th, meaning that it has declined by 73 places in the rankings over the period. However, it should be noted that the MHE Index is simply an assessment based on national multiples and does not take into account independent traders. Ludlow Town Centre has a varied independent retail offer and so this apparent decline in market share based on the national multiples it contains should be viewed in context. Of some concern is that there is at best mixed views in the town with regard to strengthening further the independent sector which is clearly a principal asset of the town. Furthermore the decline in MHE ranking witnessed does not necessarily mean that the centre has weakened its national multiple offer: rather that this sector has not been strengthened over the period in relation to other centres.

4.8 In comparison with other centres in the sub-region, as expected Ludlow is ranked lower than the nearby centres of Worcester (ranked 54th), Hereford (77th), Shrewsbury (86th), Kidderminster (156th) and Leominster (685th). However, it is above Bridgnorth (863rd) and Stourport-on-Severn (773rd). Leominster, Bridgnorth and Stourport-on-Severn are classed alongside Ludlow in the MHE Index as 'Minor District' centres. The decline in ranking witnessed by Ludlow (73 places) is second only to Bridgnorth in the sub-region, which experienced a decline of 249 places.

**General Description of the Town Centre**

4.9 Ludlow is the principal commercial centre in South Shropshire District. It is located approximately 27 miles south of Shrewsbury, 22 miles north of Hereford and 30 miles north-west of Worcester. Ludlow is an historic market town on the banks of the River Teme, and based on the 2001 census had a population of some 10,000.

4.10 The Shopping Area of the town centre, as defined in the adopted Local Plan, comprises King Street, the Bull Ring, High Street, Corve Street, Tower Street, Old Street, Broad Street and

Mill Street. An outdoor market is located on Castle Square and operates every Monday, Wednesday, Friday and Saturday.

**Diversity of Uses**

4.11 Figures 4.2 and 4.3 below show the composition of Ludlow Town Centre at 2007 and 2000 in terms of both the number of outlets and the amount of floorspace occupied. This is based on data provided by Goad, although updated by WYG for 2007. A map of the area surveyed at 2007 is contained at Appendix 6. Figure 4.2 compares the composition of Ludlow at 2007 with the national average in terms of both floorspace occupied and number of units occupied. Figure 4.3 highlights the percentage point change in the proportion of floorspace and units occupied at 2000 and 2007. Both figures detail the diversity of uses present at ground floor level only.

**Figure 4.2 Retail Composition of Ludlow Town Centre, 2007**

| Sector | No. of Outlets | % of Outlets | | Floorspace (sq. m) | % of Floorspace | |
|---|---|---|---|---|---|---|
| | | Ludlow | GB | | Ludlow | GB |
| Convenience | 25 | 11.26 | 8.44 | 7,822 | 24.41 | 13.63 |
| Comparison | 103 | 46.40 | 36.74 | 10,479 | 35.59 | 39.35 |
| Retail Service | 25 | 11.26 | 12.66 | 2,954 | 9.22 | 6.96 |
| Leisure Services | 37 | 16.67 | 20.73 | 5,574 | 17.39 | 22.31 |
| Financial and Business Services | 22 | 9.91 | 11.59 | 2,666 | 8.32 | 9.22 |
| Vacant | 10 | 4.50 | 9.51 | 1,626 | 5.07 | 7.78 |
| **TOTAL** | **222** | **100** | | **32,051** | **100** | |

Source: Experian Goad (2006) updated by WYG (2007)

**Figure 4.3 Retail Composition of Ludlow Town Centre, 2000**

| Sector | No. of Outlets | % of Outlets | | Floorspace (sq. m) | % of Floorspace | |
|---|---|---|---|---|---|---|
| | | Ludlow | Change 00-07 | | Ludlow | Change 00-07 |
| Convenience | 29 | 12.39 | -1.13 | 5,723 | 17.83 | +6.58 |
| Comparison | 103 | 44.02 | +2.38 | 12,180 | 37.96 | -2.37 |
| Retail Service | 22 | 9.40 | +1.86 | 3,298 | 10.28 | -1.06 |
| Leisure Services | 38 | 16.24 | +0.43 | 5,918 | 18.44 | -1.05 |
| Financial and Business Services | 28 | 11.97 | -2.06 | 3,094 | 9.64 | -1.32 |
| Vacant | 14 | 5.98 | -1.48 | 1,877 | 5.85 | -0.78 |
| **TOTAL** | **234** | **100** | | **32,090** | **100** | |

Source: Experian Goad (2000)

4.12 It can be seen that the convenience sector at 2007 is well represented in terms of the proportion of outlets occupied, with such units accounting for 11.3% of outlets compared to a national average of 8.4%. However in terms of the proportion of floorspace, convenience retailers occupy 24.4% of all floorspace, significantly above the national average of 13.6%. It is evident from examination of the Goad Town Centre plan that the majority (58%) of all convenience floorspace in the town is accounted for by just two larger traders: Tesco at Corve Street and Somerfield at Upper Galderford. The outdoor market offers additional convenience provision and operates four times a week, and there is a farmers market in the town centre once a month. Figure 4.3 indicates that since 2000 the number of convenience outlets has decreased by four units, whilst the proportion of convenience floorspace has increased by 2,100 sq m (or 37%).

4.13 The comparison sector in Ludlow is well represented, with such uses accounting for 46.4% of all units and 35.6% of total floorspace, compared to a national average of 36.7% and 39.4% respectively. The town centre contains a broad range of comparison retailers according to the Goad database with almost all of the various types being represented in the town. ‘Crafts, Gifts, China & Glass’ retailers are particularly well represented in the town, with 11 units present out of the 103 comparison outlets in total. Comparison traders in the town centre are predominately independent traders, giving Ludlow a unique shopping experience. Once again, additional provision is provided by the town’s markets.

4.14 In comparison with the composition in 2000, the number of comparison outlets has remained constant at 103 units although the amount of floorspace has fallen by 1,700 sq m (14.0%). From more detailed analysis of comparison units at 2000 and 2007 it is apparent that the sector as a whole has declined, rather than any specific sub-sector in particular. This coincides with the trend observed nationally which has seen comparison retailers decline in town centres, being replaced by leisure services such as cafés and restaurants.

4.15 The retail service sector as defined by Goad includes such uses as hairdressers, opticians and dry cleaners. Within Ludlow this sector is slightly under-provided. Such retailers occupy 11.3% of total units against a national average of 12.7%. However, the service sector represents 9.2% of total floorspace, which is greater than the national average of 7.0%. From more detailed analysis of the database provided by Goad it can be seen that most types of retail service are represented, suggesting the needs of local residents are being met in the town centre. With regard to change since 2000, the retail service sector has improved in terms of the number of units by three (or 13.6%); however this sector has declined in terms of floorspace by 344 sq m or (10.4%).

4.16 Leisure services are under-represented in the town centre, occupying 16.7% of all premises compared with 20.7% nationally, whilst 17.4% of floorspace is occupied by such uses against a national average of 22.3%. In this sector ‘fast food and take-away’ units and ‘public houses’ are particularly well represented. According to Figure 4.3 leisure services in the town centre have declined since 2000, by one unit and 344 sq m.

4.17 Financial and Business services are also under-provided in the town. 9.9% of units are in use for financial and business service purposes, which is below the 11.6% national average. 8.3% of total floorspace is utilised for financial and employment purposes, compared to a national average of 9.2%. Since 2000 the number of financial and business service outlets in Ludlow has fallen by six units and the proportion of floorspace by 427 sq m. This again echoes the national trend observed by Goad.

4.18 In addition to retailing, Ludlow performs a number of other important roles to the local community. It contains the headquarters of South Shropshire District Council in addition to a public Library and Tourist Information Centre. It contains a number of historic churches and buildings, and is over-looked by Ludlow Castle.

**Retailer Representation**

4.19 Ludlow Town Centre contains few major retailers and is dominated by independent traders. In terms of multiples, it contains just two of the top 20 national comparison retailers according to Focus, comprising: Boots and Woolworths. A number of other national multiples are situated within the town, including Tesco, Somerfield and Threshers. Whilst this apparent lack of multiples would be of concern to an average town centre in the UK, Ludlow benefits from the strong nature of its independent sector and the relatively low number of multiples it contains should not be viewed as an indication of bad health.

4.20 Figure 4.4 sets out retailer requirements within Ludlow Town Centre as derived from the Focus Database (June 2007). This list should be with a degree of caution as some retailers may put requirements on the Database whilst not having an active desire to locate there. Additionally, the list includes retailers who are already present in the town but are seeking new premises. Furthermore a single retailer may express more than one requirement in a town centre for different sizes of units. Nevertheless it does serve as a useful indicator of the level of demand a centre is experiencing.

**Figure 4.4 Summary of Retailer Requirements within Ludlow Town Centre, 2007**

| | **Number of Requirements** | **Minimum Floorspace (sq. m)** | **Maximum Floorspace (sq. m)** |
|---|---|---|---|
| **Convenience** | 1 | 74 | 111 |
| **Comparison** | 12 | 2,364 | 5,463 |
| **Service** | 4 | 632 | 1,877 |
| **TOTAL** | **17** | **3,070** | **7,451** |

Source: Focus Report (June 2007)

4.21 At June 2007 there were 17 operators seeking up to 7,451 sq m (gross) of floorspace. In terms of demand, the majority of units (12) are being sought by comparison retailers, who are collectively seeking up to 5,463 sq m (gross) of retail floorspace. A full list of requirements is contained at Appendix 7, however the list includes such traders as Fat Face, Halfords, Peacocks and Pets@Home. The current level of demand (17) is the highest level ever recorded and well above the average number of requirements for the past five years (11). Section 8 of this Study considers the availability of sites in the town to meet the identified need and capacity for additional floorspace, based upon growth in the spending power of the catchment area, and it is the retailers who have expressed an interest in the town who could take-up floorspace in meeting the need and capacity identified.

**Street Level Vacancies**

4.22 The proportion of vacant units within a centre can provide a good indication of how a shopping centre is performing. However, care should be taken when interpreting figures. Vacancies can occur for positive as well as negative reasons for example the opening of a new retail centre elsewhere in a town may draw retailers from older properties or more peripheral areas of the city. Vacant units will be found in even the strongest town centre and are simply an indicator of the level of demand. For example some properties may lay vacant because they are poorly maintained, unsuited to modern retailing requirements or simply not being actively marketed. Conversely a low vacancy rate does not necessarily mean that a centre is performing well. For example, if there is a proliferation of charity shops and other low value uses it may be a sign of decline, particularly where these uses are located in prime locations. Despite these issues, it is still a useful indicator of town centre performance.

4.23 Figure 4.2 indicates that at 2007 there were ten vacant units in Ludlow Town Centre occupying 1,626 sq m of retail floorspace. This equates to some 4.5% of all units and 5.1% of total floorspace, well below the expected national average of 9.5% and 7.8% respectively. It is evident that the town centre is healthy with regard to its vacancy rate. From examination of the Goad town centre plan it is apparent that vacancies are scattered throughout Ludlow, rather than being concentrated in any specific areas.

4.24 Figure 4.3 highlights the change in recorded vacancies in Ludlow Town Centre between 2000 and 2007. It demonstrates that during this time the number of vacant units has decreased by 4 units (or 29%), and the proportion of vacant floorspace by 251 sq m (or 13%). The low vacancy rate and the decrease in vacancies over the last six years indicate that Ludlow is a healthy centre and experiences sustained demand for representation.

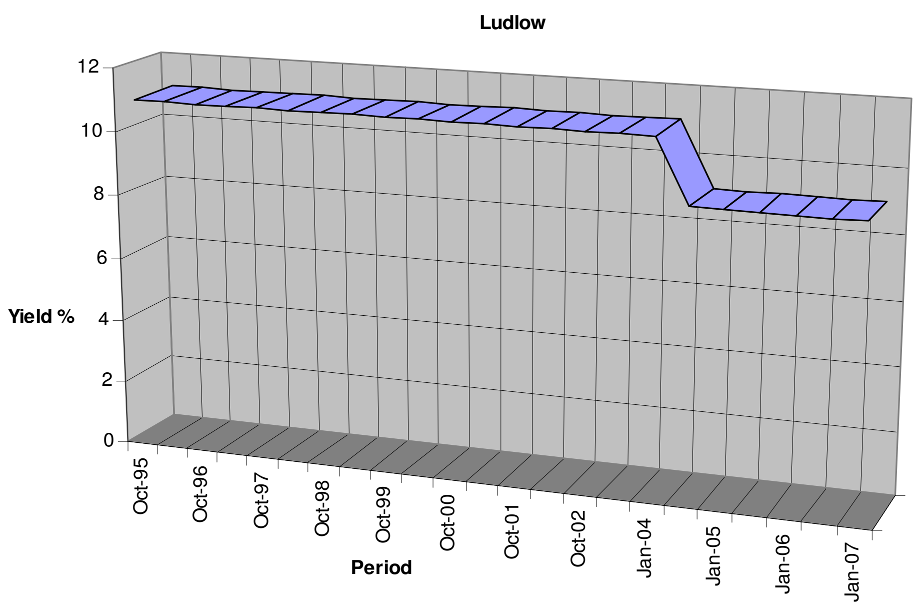
**Commercial Rents and Yields**

4.25 From discussions with local agents, it is apparent that rents in Ludlow Town Centre are high, with typical rental levels for properties in the prime retail areas approximately £260/ sq m per annum. In more peripheral town centre areas rents are lower however. This compares with typical rents in Bridgnorth Town Centre of approximately £200- 250/ sq m.

4.26 In terms of the local retail market, agents felt that there was lots of demand from retailers to let and buy properties in the town centre. The level of interest from traders is high, and advertised properties did not generally stay on the market for long. Notwithstanding this, Ludlow was felt to be expensive in terms of rents, and there was noted to be a quick turnover of retailers, especially along High Street. Demand was greatest for smaller retail units due to the nature of retails seeking representation in the town centre: principally independent traders. As such, the local property market was seen to be very healthy.

4.27 A 'yield' represents the relationship between the rental income that a property is likely to command and its capital value, expressed as a percentage. Town centre yields broadly represent the market's assessment of the risk attached to investing in a particular centre; the higher the yield, the greater the risk involved in investment. Yields provide a simple bench mark which the property market uses to assess the comparative attractiveness of different shopping centres. Many considerations determine the yield an investor will require for a particular property, including: the physical condition of the building; the potential for rental growth; the certainty of income; lease arrangement; and the range of uses to which the building can be put.

**Figure 4.5 Retail yields in Ludlow**




| | Oct-95 | Apr-96 | Oct-96 | Apr-97 | Oct-97 | Apr-98 | Oct-98 | Apr-99 | Oct-99 | Apr-00 | Oct-00 | Apr-01 | Oct-01 | Apr-02 | Oct-02 | Apr-03 | Jan-04 | Jul-04 | Jan-05 | Jul-05 | Jan-06 | Jul-06 | Jan-07 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Ludlow | 11 | 11 | 11 | 11 | 11 | 11 | 11 | 11 | 11 | 11 | 11 | 11 | 11 | 11 | 11 | 11 | 11 | 9 | 9 | 9 | 9 | 9 | 9 |

Source: Valuation Office Agency (VOA): Property Market Report (PMR), January 2007
N.B. yields between April 2002 and January 2004 have been estimated as no further information is provided, other than that yields in this period were above 10

4.28 It is evident from Figure 4.5 that between October 1995 and January 2004 yields remained stable at 11%, whilst at July 2004 yields fell to 9% where they have remained since, indicating improved investor confidence. Whilst yields have fallen their current level of 9% is quite high, possibly due to the high rents observed in the town centre, indicating that investor confidence is quite low at the current time.

**Accessibility**

4.29 Ludlow is situated on the junction of the A49 and the A4117, in the south-east of South Shropshire District. The A49 connects Ludlow with Leominster and Hereford to the south and Shrewsbury to the north, whilst the A4117 runs to the east of the town connecting to the A456 and Kidderminster. Within the town itself, due to the narrow nature of many of the shopping streets, vehicular traffic can back up along Corve Street and Old Street.

4.30 The town contains a railway station at Station Drive. Ludlow is situated on The Marches Line which runs between Manchester, Crewe and Cardiff. Furthermore daily direct services to Ludlow operate from a number of towns and cities including Bristol, Exeter, Liverpool and Chester. Bus services connect Ludlow with Birmingham and Kidderminster in addition to a number of local destinations.

4.31 There are four main off-road car parks in the town centre situated at Upper Galdeford/ Station Drive, Lower Galdeford, Castle Street and Smithfield. These operate on a pay and display basis and prices are considered reasonable in comparison with other centres WYG has studied. Additional parking is also available in-street (Figure 4.6), some of which operate using a pay and display system, with some being free although subject to time restrictions. Disabled parking is provided throughout the town centre. Although the parking tariffs are reasonable, in comparison to other town centres in the sub-region, it is important to note that businesses in the town particularly were recorded as considered that any charging at all is a threat to the continued vitality and viability of businesses.

Figure 4.6: Parking on Lower Broad Street

4.32 In addition, a free Park and Ride bus service operators from the Eco Park at Sheet Road. Park and Ride services run to the town centre every 15 minutes between 7.30 am and 6.00 pm Monday to Saturday. Further Park and Ride facilities operator during the annual Food and Drink Festival weekend.

4.33 Ludlow Town Centre is pedestrian friendly, and parts of the town centre are solely for pedestrian use. In areas accessible to vehicular traffic, there are pedestrian crossings at regular intervals, facilitating easier movement around the centre and giving priority to pedestrians. Signage is provided throughout the town centre for the benefit of town centre users.

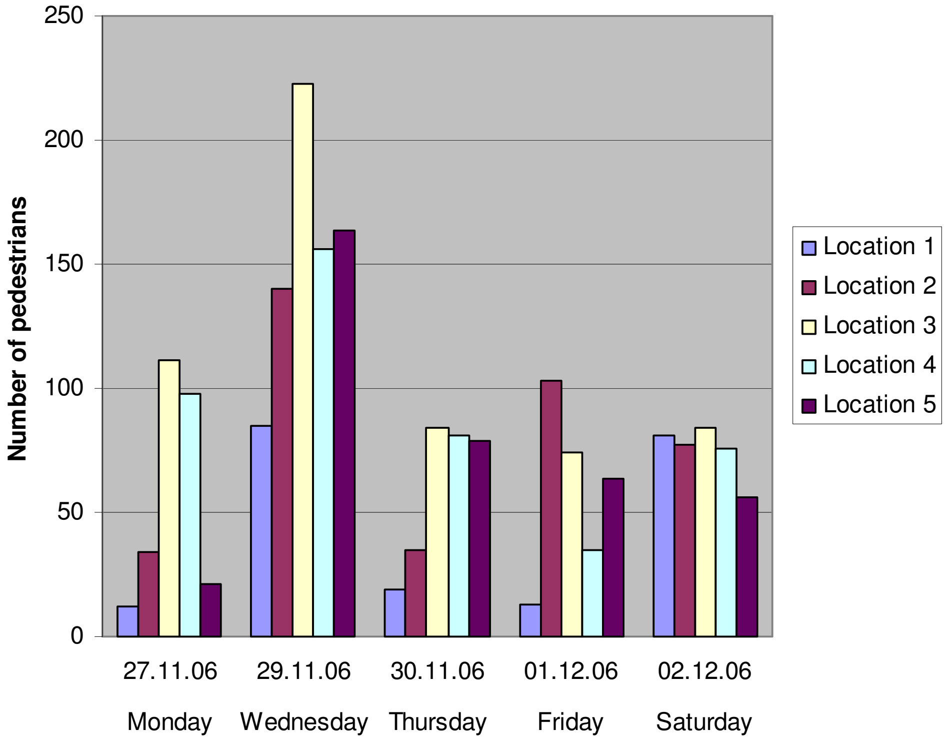
4.34 As part of the health check NEMS Market Research has undertaken a pedestrian count of movement around Ludlow Town Centre. Five count points were identified: Corve Street outside Tesco (Location 1); north Corve Street (Location 2 referred to as 'Corve Street elsewhere' in the NEMS pedestrian count); King Street (Location 3); Castle Street (Location 4); and Market Street (Location 5). The number of pedestrians passing in both directions was counted in five minute intervals over five days: Monday (27.11.06); Wednesday (29.11.06); Thursday (30.11.06); Friday (01.12.06); and a Saturday (02.12.06). The results were then indexed with the highest level of footfall being afforded a top score of 100, and the subsequent indexed footfall being calculated accordingly. Figures 4.6 and 4.7 below show the results obtained through this process and the full index of results is contained at Appendix 4.

**Figure 4.7 Ludlow pedestrian count (average and indexed number of pedestrians recorded)**

| **Location** | **Date of count** | | | | | **Total Count** | **Total Index** |
|---|---|---|---|---|---|---|---|
| | **Monday 27.11.06** | **Wednesday 29.11.06** | **Thursday 30.11.06** | **Friday 01.12.06** | **Saturday 02.12.06** | | |
| 1. Corve Street outside Tesco | 12 | 85 | 19 | 13 | 81 | 210 | 36 |
| 2. North Corve Street | 34 | 140 | 35 | 103 | 77 | 389 | 68 |
| 3. King Street | 111 | 223 | 84 | 74 | 84 | 576 | 100 |
| 4. Castle Street | 98 | 156 | 81 | 35 | 76 | 446 | 77 |
| 5. Market Street | 21 | 164 | 79 | 64 | 56 | 384 | 67 |
| **TOTAL** | **276** | **768** | **298** | **289** | **374** | **2005** | **-** |

Source: NEMS Market Research, 2006

**Figure 4.8 Ludlow pedestrian count**




4.35 The pedestrian count indicates that Wednesday was the busiest of the five days in terms of footfall, with 768 pedestrians recorded in total for all five count points, compared to 374 on the Saturday (02.12.06), 298 on Thursday (30.11.06), 289 on Friday (01.12.06) and 276 on Monday (27.11.06). Location 3 (King Street) recorded the greatest number of pedestrians overall with a total count for the five survey days of 576 persons, compared to 446 persons counted at Castle Street (Location 4), 389 persons counted at north Corve Street (Location 2), 384 persons counted at Market Street (Location 5) and 210 persons counted at Corve Street outside Tesco (Location 1).

4.36 In respect of accessibility, the in-street survey undertaken by NEMS identified the following:

- 73% of visitors to Ludlow had regular access to a car for personal use during the day and during the evening/ night-time;
- The most common method of arriving in the centre was driving a car/ van (54%);
- This was followed by arriving on foot (34%) and by bus, minibus or coach (6%);
- Of those that drove the most popular place to park was in-street, with 23% of drivers leaving their vehicle there. The most frequently used car parks were Smithfield (17%) and Castle Street (16%);
- The majority of drivers (78%) had no difficulty in obtaining a car parking space on the day of the survey;

- 29% of people travelled for less than five minutes to reach Ludlow, 21% travelled for over twenty minutes and 19% for between six and ten minutes;
- 43% of visitors considered parking provision in Ludlow to be ‘about the same’ as that in other centres that they visited, although 37% considered parking in the town to be either ‘worse’ or ‘much worse’ compared to other centres; and
- Accessibility by public transport was considered by 44% of visitors to Ludlow to be ‘about the same’ as other centres, with 20% indicating that it was ‘better’ or ‘much better’ in Ludlow than in other centres which they visited.

**Perception of Safety and Occurrence of Crime**

4.37 52% of visitors surveyed by NEMS indicated that they considered day-time safety in Ludlow to be ‘about the same’ as other centres which they visited, however a notable 46% of respondents stated that day-time safety was either ‘better’ or ‘much better’ than other centres which they visited. Just 1% of respondents deemed day-time safety in the centre to be either ‘worse’ or ‘much worse’ than in other centres, with 2% stating that they did not know either way. In terms of safety during the ‘evening/ night-time’, 36% of visitors stated that this was ‘about the same’ in Ludlow as in other centres which they visited, with 18% considering it to be either ‘better’ or ‘much better’ than other centres.

**Customer Views and Behaviour**

4.38 The in-street survey undertaken by NEMS Market Research is contained at Appendix 3, although the main results in terms of Ludlow were:

- The vast majority of visitors to Ludlow (93%) had travelled to the centre directly from home;
- Most of those surveyed most (94%) indicated that they were not a visitor to the South Shropshire area;
- The most popular reasons given by visitors for their presence in Ludlow were: to undertake food and grocery shopping (31%), due to work/ school (17%) and due to social/ leisure activities (12%);
- The majority of visitors (64%) planned to stay in the centre for up to two hours;
- 46% of visitors indicated that they planned to undertake their main food shop on the day of the survey. Of these, 84% stated that they visited Ludlow at least once a week for such purposes;
- 84% of visitors did not plan to purchase clothing and footwear goods on the day of the survey, with the highest proportion of these people (36%) last visited Ludlow Town Centre for such purposes; and

- When visitors were asked how often they visited the centre today compared to five years ago, 68% stated that they visited Ludlow ‘about as frequently’.

4.39 Visitors to Ludlow were asked to rate the centre on a number of aspects, compared to other shopping centres which they visited. There were no aspects identified by more than half of respondents as being either ‘worse’ or ‘much worse’ in Ludlow than in other centres. However most aspects were considered to be ‘about the same’ as other centres according to the majority of visitors, for example the quality of shops, leisure facilities and cleanliness.

**Environmental Quality**

4.40 Ludlow Town Centre is a particularly attractive centre containing a mixture of modern and traditional older buildings. It has a strong tourist element, due to the historic nature of the town, defined by key buildings and environmental features including Ludlow Castle (Figure 4.9) and Dinham Bridge (Figure 4.10). The town is clean with no litter or graffiti present. Street furniture is present at regular intervals including benches, bins, lighting, CCTV, public art, recycling facilities and flower boxes which add to the street scene. Public toilets are also available near to Ludlow castle. The town centre creates an inviting and safe environment for town centre users.

Figure 4.9: Dinham Bridge and the River Teme

4.41 Shop frontages throughout the town centre are maintained to a high standard, and the defined Shopping Development area comprises a mix of independent and multiple traders. The environmental quality of the town centre is unique, and contains a number of historic buildings within it. However as a result of the narrow streets within the town, traffic often queue along Corve Street and Old Street causing associated externalities of noise and pollution.

Figure 4.10: Ludlow Castle

**Business Survey**

4.42 A questionnaire was distributed to all local businesses within Ludlow by WYG in conjunction with the Ludlow Chamber of Trade and Commerce. 222 questionnaires were distributed with

45 being returned: a response rate of 20%. The business survey results are contained at Appendix 5, however the main findings were as follows:

- 59% of respondents had been trading in Ludlow for ten years or more;
- Since trading began, the majority of respondents (63%) indicated that trade had grown either ‘significantly’ or ‘moderately’;
- In terms of current business performance, 46% of respondents felt that currently their business was trading ‘moderately’, with some 39% indicating that their business was trading either ‘well’ or ‘very well’;
- 36% of respondents were owner occupiers with the remaining 64% being leaseholders;
- In total 164 people were employed by respondents of which most (53%) were employed on a full-time basis;
- Local residents were relied upon by 42% of respondents for the majority of their business;
- Most respondents (71%) stated that they considered the town centre to have a ‘good balance’ between shops and other non-retail uses;
- The main constraints on current business performance were considered to be: inadequate customer car parking (28%); high rents/overheads (19%); and lack of day visitors/tourists to the town (9%);
- Most respondents (47%) had no plans to alter their business in any way over the next five years; and
- Hereford was deemed by the highest proportion of respondents (22%) as being their major competitor, with a further 19% considering Leominster to be their major competitor.

4.43 Respondents were asked to rate a number of different aspects of the town centre. The issues highlighted as being ‘good’ by a majority of respondents comprise: foodstore provision (60%); range of shops and services (56%); and events (55%). Conversely. Public toilets were considered to be ‘poor’ by 53% of respondents. Respondents were then asked to consider a range of measures to improve the town centre. Popular measures to improve Ludlow were seen to be: cheaper off-street parking (88%); greater promotion/marketing (77%); more independent/specialist traders (75%); increased choice/range of shops (74%); and short-stay in-street parking (73%).

**Conclusions on Vitality and Viability**

4.44 This assessment has shown Ludlow to be a vital and viable town centre. Over the past few years, yields have fallen and rental levels are high compared to other town centres of a similar size. A strong demand was shown by retailers seeking to locate to the town, accessibility was seen to be generally good, and the town centre shopping environment was well-maintained and convivial. Additionally, the convenience and comparison retail sectors in the town were shown to be strong when compared to the national average.

4.45 Notwithstanding these positive attributes, retail services, leisure services and financial and business services in the town centre are below the UK national average according to Goad. However, vacancy rates in Ludlow have decreased in the past few years and are low, highlighting Ludlow's strength in the retail sector.

## Bishop's Castle

4.46 Bishop's Castle is a small market town situated in the west of the District adjacent to the B4835. It is located some four miles east of the Welsh border, approximately 18 miles north-west of Ludlow and 20 miles south west of Shrewsbury. The defined Shopping Development area is linear in form and comprises Church Street, High Street and Welsh Street.

### Diversity of Uses

4.47 Figure 4.11 below shows the diversity of uses present in Bishop's Castle Town Centre based on a survey undertaken by WYG in June 2007. The results obtained have been compared to the Goad national average statistics, for diversity of uses at 2006, (the latest year such information is available) to give and indication of how the town centre compares to the 'average' town centre in the UK. A land-use map of Bishop's Castle Town centre is included in this Study at Appendix 6.

**Figure 4.11 Retail Composition of Bishop's Castle, 2007***

| Sector | No. of Outlets | % of Outlets | | Floorspace (sq. m) | % of Floorspace | |
|---|---|---|---|---|---|---|
| | | Bishop's Castle | GB | | Bishop's Castle | GB |
| Convenience | 11 | 18.64 | 8.47 | 1,283 | 17.78 | 13.87 |
| Comparison | 19 | 32.20 | 37.34 | 2,157 | 29.90 | 40.36 |
| Retail Service | 4 | 6.78 | 12.62 | 776 | 10.75 | 6.92 |
| Leisure Services | 11 | 18.64 | 20.67 | 1,407 | 19.51 | 22.34 |
| Financial & Business Services | 12 | 20.34 | 11.59 | 1,157 | 16.04 | 9.12 |
| Vacant | 2 | 3.39 | 9.30 | 434 | 6.02 | 7.39 |
| **TOTAL** | **58** | **100** | | **7,214** | **100** | |

Source: WYG (2007)
*No data is available for 2000

4.48 Comparison retailers in Bishop's Castle represent 18.6% of all outlets and 17.8% of floorspace which is above the national average of 8.5% and 13.9% respectively. Consequently the town centre is well represented in this sector, and includes two Co-op convenience stores and a Harry Tuffin's store (located in the Texaco petrol filling station on Church Street) amongst a number of independent traders. A market operates in the town on a weekly basis and provides additional convenience provision, with a farmers' market held in the town centre once a month.

4.49 With regard to comparison retailers, such traders account for 32.2% of units which is below to the national average of 37.3%. Furthermore, in terms of the proportion of floorspace for which they account, comparison traders make up 29.9% of floorspace compared to the national average of 40.4%. This indicates the presence of a large number of small comparison businesses, which is an accurate assessment given the nature of retailing in Bishop's Castle which is predominately independent traders. Further comparison provision is provided by the weekly market, a farmers' market and a once monthly antique and flea market.

4.50 With regard to retail services 6.8% of units are in use for such purposes against an average of 12.6%, whilst 10.8% of floorspace is accounted for by retail services which compares to 6.9% nationally. The majority of floorspace in this sector (579 sq m or 75%) is accounted for by the garage situated on Church Street behind a Texaco petrol filling station.

4.51 In terms of leisure services such as restaurants, public houses and 'fast food' take-aways, such uses comprise 18.6% of units in the town centre which is slightly below the national average of 20.7%. The proportion of floorspace accounted for by this sector (19.5%) is also lower than the national average (22.3%). The town centre contains an array of individual restaurants and public houses in this sector, serving the needs of local residents and visitors alike.

4.52 With regard to financial and business services, Bishop's Castle contains an above average representation of such traders. Financial and business services occupy 20.3% of all outlets and 16.0% of total floorspace compared to national averages of 11.6% and 9.1% respectively. Occupiers within this sector include McCartney's estate agents, Barclays Bank and HSBC Bank.

4.53 Figure 4.11 indicates that at the time of the WYG survey there were a total of 58 retail units in the defined town centre occupying cumulatively approximately 7,214 sq m of retail floorspace. It is evident that the retail sector in the town is dominated by independent traders. In addition to the diversity of uses outlined above, Bishop's Castle contains a Tourist Information Centre, a Library and a Town Hall. Residential units are also interspersed with retail units throughout the town centre.

**Street Level Vacancies**

4.54 At the time of the WYG survey (January 2007) the town centre contained just two vacant units (Figure 4.12) occupying some 434 sq m of retail floorspace. This equates to some 3.4% of all units and 6.1% of total floorspace which is below the national averages of 9.3% and 7.4% respectively. The town centre does not suffer from a high vacancy rate. Indeed it is normal to have some vacant units in any town centre as part of a centre's natural evolution. It also provides the opportunity for traders who wish to locate into a town centre to move into it.

Figure 4.12: Vacant unit on Church Street

**Commercial Rents and Yields**

4.55 Due to the modest size of Bishop's Castle no rental level of yield information is available.

**Accessibility**

4.56 Bishop's Castle is located on the B4385 close to the A489 and A488. In terms of car parking in the town centre one off road car park is provided on Harley Jenkins Street and this is well signposted from approach roads. There is an additional car park at Auction Yard off Station Street, adjacent to the Livestock market. On Street parking is available throughout the defined Shopping Development area, and both in-street and off-street parking are free. Bus service operate through the centre (numbers 552, 553, 775, 767 and 782) connecting the town with Shrewsbury, Newtown and Welshpool in addition to other local destinations. Although the retail area of the town centre is open to vehicular traffic, this is slow moving and not in conflict overly with pedestrian users. As such, the town centre is pedestrian friendly and provides a safe environment for users.

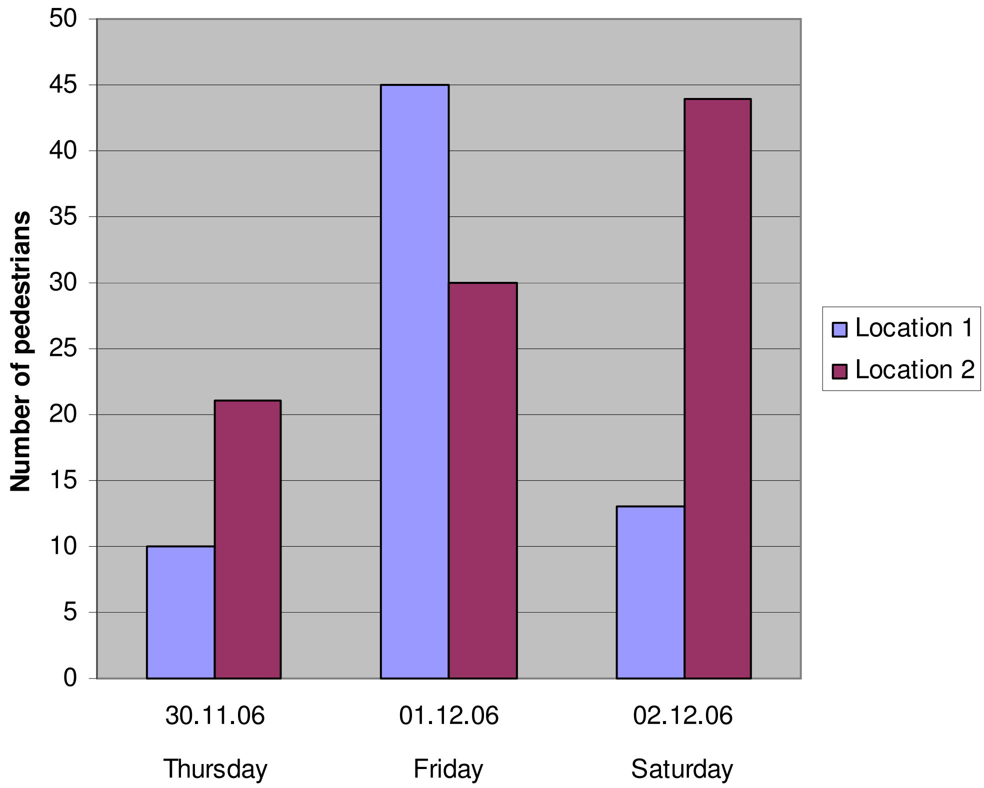
4.57 As part of the health check NEMS Market Research has undertaken a pedestrian count of movement around Bishop's Castle Town Centre. Two count points were identified: Church Street outside the Harry Tuffin's store (Location 1) and High Street outside HSBC (Location 2). The number of passing pedestrians in both directions was counted over a five minute period at three points during the day: once in the morning (between 10.00 and 12.00); once at midday (between 12.00 and 14.00); and once in the afternoon (between 14.00 and 14.00). This process was repeated over three days: Thursday (30.11.06); Friday (01.12.06); and Saturday (02.12.06). The results were then indexed with the highest level of footfall being afforded a top score of 100, and the subsequent indexed footfall being calculated accordingly. Figures 4.13 and 4.14 below show the results obtained through this process, and a full breakdown of results is contained at Appendix 4.

**Figure 4.13 Bishop's Castle pedestrian count (average number of pedestrians recorded)**

| Location | Date of count | | | Total Count | Total Index |
|---|---|---|---|---|---|
| | Thursday 30.11.06 | Friday 01.12.06 | Saturday 02.12.06 | | |
| 1. Church Street outside Harry Tuffin's | 10 | 45 | 13 | 68 | 72 |
| 2. High Street outside HSBC | 21 | 30 | 44 | 95 | 100 |
| **TOTAL** | **31** | **75** | **57** | **163** | **-** |

Source: NEMS Market Research, 2006

**Figure 4.14 Bishop's Castle pedestrian count**




4.58 The pedestrian count data indicates that Friday was the busiest of the three days in terms of footfall, with 75 pedestrians recorded in total, compared to 57 on the Saturday and 31 on the Thursday. This is unsurprising considering that Friday is market day. Location 2 (High Street outside HSBC) recorded the greatest number of pedestrians overall with a total count for the three survey days of 95 persons, compared to 68 persons counted at Location 1 (Church Street outside of the Harry Tuffin's store).

4.59 In respect of accessibility, the in-street survey undertaken by NEMS identified the following:

- 91% of visitors to Bishop's Castle had regular access to a car for personal use during the day and during the evening/ night-time;
- The most common method of arriving in the centre was driving a car/ van (56%), followed by arriving on foot (42%);
- Of those that drove the most popular place to park was seen to be in-street, with 66% of drivers leaving their vehicle here. The most frequently used car parks were: Auction Yard Road (19%); and Harley Jenkins (3%);
- The majority of drivers (86%) had no difficulty in obtaining a car parking space on the day of the survey;
- Most respondents (51%) travelled for five minutes or less to reach Bishop's Castle, with 16% travelling for between six and ten minutes indicating the localised nature of its shopping catchment;
- Car parking provision was deemed to be 'about the same' in Bishop's Castle compared to other centres by 30% of visitors, although 25% considered it to be 'worse' than in other centres and 19% that it was 'better'; and
- Accessibility by public transport was considered be either 'worse' or 'much worse' than in other centres which they visited by the majority (54%) of respondents.

**Perception of Safety and Occurrence of Crime**

4.60 79% of shoppers interviewed for the in-street survey considered shopper safety in Bishop's Castle during the day to be either 'better' or 'much better' than other centres which they visited. Significantly, no shoppers whatsoever deemed day-time safety in the town to be either 'worse' or 'much worse' than in other centres which they visited. With regard to safety during the evening/ night-time, 74% of visitors considered this to be either 'better' or 'much better' in Bishop's Castle than in other centres which they visited. In light of this, the town centre is clearly viewed as being a very safe centre by users.

**Customer Views and Behaviour**

4.61 The in-street survey undertaken by NEMS Market Research is contained at Appendix 3, although the main results were:

- The vast majority of visitors to Bishop's Castle (86%) had travelled to the centre directly from home;
- Most of those interviewed (91%) indicated that they were not a visitor to the South Shropshire area;

- The most popular responses recorded when visitors were asked why they were in Bishop's Castle were: to undertake food and grocery shopping (25%), due to work/ school (19%), and for social/ leisure activities (14%);
- 46% of visitors planned to stay in the centre for up to half an hour, with a further 35% planning to stay for up to two hours;
- 39% of visitors indicated that they planned to undertake their main food shop on the day of the survey. Of these, 46% stated that they visited Bishop's Castle at least once a week for such purposes; and
- When visitors were asked how often they visited the centre currently compared with five years ago, 63% stated that they visited Bishop's Castle 'about as frequently'. However, 16% visited either 'more' or 'much more' frequently than before.

4.62 Visitors to Bishop's Castle were asked to rate the centre in terms of a number of aspects, compared to other shopping centres which they visited. Most aspects were deemed to be 'about the same' in Bishop's Castle compared to other centres which they visited, including leisure facilities, the shopping environment, cleanliness and public information/ signposts/ performances.

**Environmental Quality**

4.63 Bishop's Castle is a linear centre, and all of the defined Shopping Development area is located within a Conservation Area. This reflects the high quality and historic nature of the town centre, which is built on a steep slope. The streets are clean with no evidence of litter. Units themselves are colourful (Figure 4.15) and maintained to a high standard of repair, with the town dominated by independent traders.

Figure 4.15: High Street

4.64 The majority of the centre is focused on Church Street and High Street. As mentioned above although these are open to vehicular transport, this is infrequent and slow in nature providing a pleasant environment. Effort is clearly made to provide an attractive environment with flower baskets and street decorations visible.

Figure 4.16: Church Street

**Business Survey**

4.65 A questionnaire was distributed by WYG in conjunction with the Bishop's Castle Business Network to all businesses located in Bishop's Castle. 53 questionnaires were delivered with 33 being returned: a response rate of 62%. A full list of the results obtained is contained at Appendix 5. The main findings of the business survey are:

- 69% of respondents had been trading in Bishop's Castle for five years or more;
- Since trading began, a significant 69% of respondents indicated that trade had grown either 'moderately' or 'significantly';
- In terms of current business performance, 61% of respondents felt that their business was trading 'moderately' at the present time, with some 33% indicating that their business was trading either 'well' or 'very well';
- The majority of respondents (55%) were owner occupiers;
- In total 111 people were employed by respondents of which most (60%) were employed on a part-time basis;
- Local residents were relied upon by 37% of respondents for the majority of their business, with other residents in the wider South Shropshire area accounting for a further 30% of businesses;
- 81% of respondents stated that they considered the town centre to have a good balance between shops and other non-retail uses;
- The main constraints on current business performance were considered to be a lack of footfall outside premises (18%), inadequate customer parking (18%) and a lack of day visitors/tourists to the town (17%);
- Most respondents (71%) had no plans to alter their business in any way over the next five years; and
- Shrewsbury was deemed by 41% of respondents as being their major competitor, followed by Ludlow (32%).

4.66 Respondents were asked to rate the town centre in terms of a number of different aspects. Issues highlighted as being good by a majority of respondents were: events (82%); foodstore provision (55%); and personal safety (53%). Conversely, access by public transport (58%), the location and quality of car parks (56%) and security (CCTV) (52%) were all considered by most respondents as being poor. Popular measures to improve Bishop's Castle Town Centre were seen to be: greater promotion/marketing (82%); improved public transport (79%); more quality restaurants/pavement cafes (72%); more independent/specialist traders (70%); and an increased choice/range of shops (67%).

### Conclusions on Vitality and Viability

4.67 Bishop's Castle is a healthy retail centre. The proportion of units and floorspace in the convenience sector in the town is above the national average, whilst the comparison sector contains a range of independent and specialist traders which give the centre a distinct character. Vacancies are extremely low, and the environmental quality of the town centre is good. Notwithstanding this, the in-street visitor's survey and business survey highlighted that residents and businesses in the area considered accessibility by public transport to be in need of improvement.

## Church Stretton

4.68 Church Stretton is situated adjacent to the A49 in the north of the District. The majority of retailing in the centre is focused on Sandford Avenue and High Street. The town is situated within the Shropshire Hills Area of Outstanding Natural Beauty, and much of the defined shopping area is designated as a conservation area. The Shopping Development area, as defined in the adopted Local Plan, comprises Sandford Avenue. Churchway, High Street, Lion Meadow and part of Shrewsbury Road.

### Diversity of Uses

4.69 Figure 4.17 below shows the diversity of uses present in Church Stretton at 2007, based on surveys undertaken by WYG in June 2007. The area surveyed is Church Stretton Town Centre, as defined in the adopted Local Plan. The results obtained have been categorised on the basis of the GOAD definition of town centre uses in order to allow comparison with the national average. A map of the survey area and the diversity of uses present is contained in this Study at Appendix 6.

**Figure 4.17 Retail Composition of Church Stretton, 2007**

| Sector | No. of Outlets | % of Outlets | | Floorspace (sq. m) | % of Floorspace | |
|---|---|---|---|---|---|---|
| | | Church Stretton | GB | | Church Stretton | GB |
| Convenience | 8 | 11.43 | 8.47 | 2,215 | 22.05 | 13.87 |
| Comparison | 30 | 42.86 | 37.34 | 4,523 | 45.03 | 40.36 |
| Retail Service | 10 | 14.29 | 12.62 | 957 | 9.52 | 6.92 |
| Leisure Services | 9 | 12.86 | 20.67 | 917 | 9.13 | 22.34 |
| Financial & Business Services | 13 | 18.57 | 11.59 | 1,433 | 14.26 | 9.12 |
| Vacant | 0 | 0.00 | 9.30 | 0 | 0.00 | 7.39 |
| **TOTAL** | **70** | **100** | | **10,045** | **100** | |

Source: WYG (2007)
*No data is available for 2000

4.70 Figure 4.17 indicates that at the time of the WYG survey some 11.4% of floorspace in Church Stretton was in use for convenience purposes, which is above the national average of 8.5%. Moreover in terms of convenience floorspace this represents 22.1% of all floorspace which is also above the national average of 13.9%. Convenience retailing in the centre is dominated by the Co-op supermarket situated on Lion Meadow which accounts for 983 sq m (or 44%) of all convenience floorspace in the town centre. A market also operates in the centre on Thursday and alternate Fridays and Saturdays, which provided further provision in this sector.

4.71 With regard to comparison retailers, such traders occupy 42.9% of all units compared to 37.3% nationally. Such uses represent 45.0% of all floorspace in the town centre, which compares to a national average of 40.4%. Consequently, the town centre is well represented in this sector and comprises a strong comparison goods destination. Further comparison provision is provided by the town's markets.

4.72 Both the proportion of units occupied by retail services (14.3%) and the proportion of floorspace occupied (9.5%) are above the average for UK town centres (12.6% and 6.9% respectively). Consequently the retail service representation in the town centre can be considered healthy.

4.73 From our analysis of uses present within the town centre it is apparent that the leisure sector within the town centre is under-represented. Some 12.9% of units are in use for leisure service purposes which compares to a national average of 20.7%, and 9.1% of floorspace is in such use against 22.3% nationally. Notwithstanding this, it is evident from our visits that the town centre does contain a range of good quality public houses and restaurants.

4.74 Financial and business services in Church Stretton occupy 18.6% of all units and 14.3% of retail floorspace. This compares to respective national averages of 11.6% and 9.1%. The town centre contains a number of banks including HSBC, Lloyds TSB and Barclays, in addition to a number of estate agents and other financial services.

4.75 In addition to the retailing and leisure facilities outlined above, Church Stretton provides a number of other civic uses. It contains several churches, with a Library and Tourist Information Centre located on Church Street. A police and fire station are also situated in the town centre on Sandford Avenue.

**Street Level Vacancies**

4.76 At the time of the WYG survey in January 2007, there were no vacant units located within the town centre. This indicates that there is a strong demand from retailers wishing to locate in the centre and implies health, although it will prevent new retailers who may wish to locate in the centre from doing so. Notwithstanding this, there are a number of potential sites for future retail development present in the town centre and its immediate surroundings which is explored in Section 8 of this Study.

**Commercial Rents and Yields**

4.77 Due to the modest size of the town centre and the lack of available units, no data on rental levels or yields is available.

**Accessibility**

4.78 Church Stretton is located adjacent to the A49 which provides direct access to Shrewsbury in the north and Ludlow, Leominster and Hereford to the south. Parking in the town centre is predominantly in the form of off-street facilities which are located on Lion Meadow (Figure 4.18), although limited in-street parking can also be found around the town. Although some free in-street time restricted parking is in operation, the majority of parking facilities operate on a pay and display basis priced at 40p for up to one hour, 80p for up to two hours, £2.00 for up to four hours and £3.00 for the day. These rates are reasonable when compared to prices in other town centres WYG has studied. However, a significant proportion of the traders interviewed in Church Stretton considered that the charges for car parking could affect adversely the continued vitality and viability of the town and the survival of individual businesses.

Figure 4.18: Off-street parking in Church Stretton

4.79 Public transport in the town is good, with frequent bus and rail services in operation. Buses (numbers 435, 540 and 541) connect the town to Ludlow and Shrewsbury and other local destinations, and a subsidised 'ring and ride' bus service is in operation for the immobile or those without access to a car. The railway station is situated to the east of the town centre in close proximity to it. The town is situated on the Manchester to Cardiff railway line.

4.80 Pedestrian movement around the town centre is easy, and aided by car and comprehensive signage. Although vehicles are permitted to drive through the town centre, those present are slow moving and do not present undue hazards to pedestrians. The accessibility of the town centre to motorists could change in future if a Traffic Management Plan for the town, including a one-way system and semi-pedestrianisation, is introduced. In addition, a pedestrian crossing linked to traffic lights is situated on Sandford Avenue to help mitigate any potential vehicular/ pedestrian conflict.

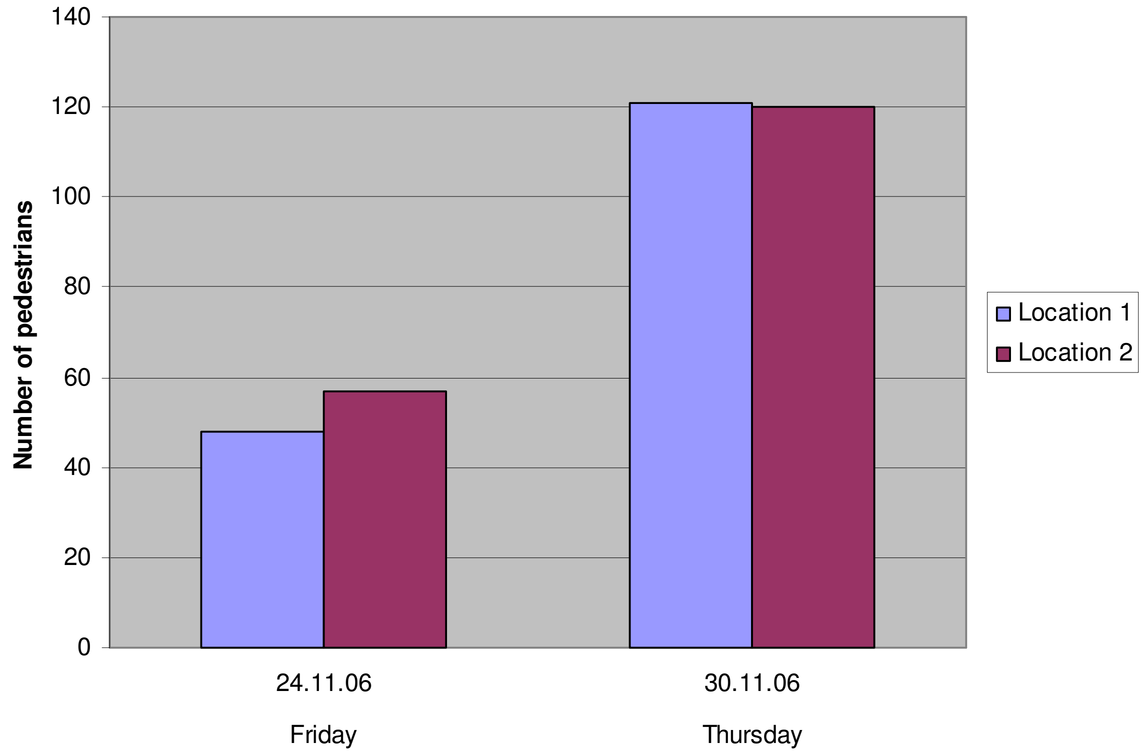
4.81 NEMS Market Research undertook a pedestrian count of movement around Church Stretton Town Centre which is contained at Appendix 4 of this Study. Two count points were identified: Lion Meadow outside the Co-op (Location 1) and Sandford Avenue outside the Spar (Location 2). The number of passing pedestrians in both directions was counted over a five minute period at three times during the day: once in the morning (between 10.00 and 12.00); once at midday (between 12.00 and 14.00); and once in the afternoon (between 14.00 and 16.00). This process was repeated over two days: a Friday (24.11.06); and a Thursday (30.11.06). The results were then indexed with the highest level of footfall being afforded a top score of 100, and the subsequent indexed footfall being calculated accordingly. Figures 4.19 and 4.20 below show the results obtained through this process.

**Figure 4.19 Church Stretton pedestrian count (average and indexed number of pedestrians recorded)**

| Location | Date of count | | Total Count | Total Index |
|---|---|---|---|---|
| | Friday 24.11.06 | Thursday 30.11.06 | | |
| 1. Lion Meadow | 48 | 121 | 169 | 95 |
| 2. Sandford Avenue | 57 | 120 | 177 | 100 |
| **TOTAL** | **105** | **241** | **346** | **-** |

Source: NEMS Market Research, 2006

**Figure 4.20 Bishop's Castle pedestrian count**



4.82 The pedestrian count data indicates that Thursday was the busiest of the two days in terms of footfall, with 241 pedestrians recorded in total, compared to 105 on Friday (24.11.06). Location 2 (Sandford Avenue) recorded the greatest number of pedestrians overall with a total count for the two survey days of 177 persons, compared to 169 persons counted at Location 1 (Lion Meadow).

4.83 In respect of accessibility, the in-street survey undertaken by NEMS identified the following:

- 71% of visitors to Church Stretton had regular access to a car for personal use during the day and during the evening/ night-time;
- The most common method of arriving in the centre was driving a car/ van (48%). This was followed by arriving on foot (44%) and by bus, minibus or coach (3%);
- Of those that drove the most popular place to park was on-street, with 63% of drivers leaving their vehicle here. The remaining 33% of drivers left their vehicle at Easthope Street (Lion Meadow) car park;
- The majority of drivers (86%) had no difficulty in obtaining a car parking space on the day of the survey;
- 72% of visitors travelled for ten minutes or less to reach the centre;
- When asked to compare car parking in Church Stretton against other centres which they visited, 40% of visitors deemed this to be ‘about the same’ as other centres. A further 27% of visitors felt that parking was either ‘better’ or ‘much better’ in Church Stretton than in other centres which they visited;
- Car parking prices were seen to be ‘about the same’ in Church Stretton as in other centres by the highest proportion (36%) of visitors, although 26% considering prices to be ‘worse’ or ‘much worse’ than in other centres; and
- Accessibility by public transport was considered by 48% of visitors to Church Stretton to be ‘about the same’ as other centres, with 26% indicating that it was ‘better’ or ‘much better’ than other centres.

**Perception of Safety and Occurrence of Crime**

4.84 In terms of shopper safety during the day-time, 50% of the visitors interviewed through the in-street survey deemed this to be either ‘better’ or ‘much better’ in Church Stretton compared to other centres which they visited, with the remaining 50% deeming day-time safety to be ‘about the same’ as in other centres. With respect to safety during the evening/ night-time 40% of respondents indicated that this was either ‘better’ or ‘much better’ in Church Stretton compared to other centres which they visited, with just 2% stating that evening/ night-time safety was either ‘worse’ or ‘much worse’ than other centres which they visited.

**Customer Views and Behaviour**

4.85 The in-street survey undertaken by NEMS Market Research is contained at Appendix 3 and indicated the following in respect of visitors to Church Stretton:

- The vast majority of visitors (97%) had travelled to the centre directly from home;
- None of those interviewed indicated that they were a visitor to the South Shropshire area;
- The most popular reasons for visitors being in Church Stretton was to undertake food and grocery shopping (47%);
- 84% of visitors planned to stay in the town for two hours or less;
- 42% of visitors indicated that they planned to undertake their main food shop on the day of the survey. Of those that were not undertaking their main food shop, most (56%) last visited Church Stretton for such purposes; and
- When visitors were asked how often they visited the centre today compared to five years ago, 82% stated that they visited Church Stretton 'about as frequently'.

4.86 Visitors to Church Stretton were asked to rate the centre on a number of aspects, compared to other shopping centres which they visited. Through this process all aspects of the town centre were considered to be 'better', 'much better' or 'about the same' as in other centres visited. These are very positive results for the town, implying that visitors are happy with the shopping experience offered by Church Stretton.

**Environmental Quality**

4.87 As highlighted above much of the town centre is designated as a Conservation area, and contains many historic and attractive buildings. Although the majority of units in the town centre are maintained to a high standard, the quality of units on some peripheral areas is more variable and would benefit from investment. However, where modern units are present these are generally sympathetic to the historic context within which they are located, and the aesthetic quality of the centre is high. Additional greenery is provided in the town centre in the form of hanging baskets, and public toilets are situated on Easthope Road. Church Stretton provides an attractive environment for shoppers.

Figure 4.21: Sandford Avenue

**Business Survey**

4.88 A business questionnaire was distributed to all local businesses within Church Stretton by WYG in conjunction with the Church Stretton Chamber of Trade, in order to obtain businesses' opinions on the centre, how it is performing and the future direction it should take. A total of 78 questionnaires were distributed with 32 being returned; a response rate of 41%. Full details of the results obtained are contained at Appendix 5. The key findings of the business surveys are:

- 72% of respondents have traded in Church Stretton for over ten years, with a significant 25% having been in operation for in excess of twenty years;
- 71% of respondents indicated that business had either 'grown moderately' or 'grown significantly' since they began trading;
- 45% of respondents considered themselves to be trading either 'well' or 'very well' at the current time, with a further 42% trading 'moderately';
- 69% of respondents were leaseholders with 31% being owner occupiers;
- 115 people were employed in total by respondents. Most (60%) were employed on a part-time basis;
- Local residents were relied upon by 48% of traders as their primary source of trade;
- In terms of the mix of shops and other non-retail uses present in Church Stretton, 75% of respondents felt that there was a good balance;
- The main constraints on business performance were deemed to be: inadequate customer parking (20%) and lack of footfall outside premises (14%);
- 54% of respondents have no plans to alter their business in any way over the next five years. 39% are planning to either refurbish or extend their existing floorspace; and
- Ludlow was felt by the highest proportion of traders (30%) to be their biggest competitor.

4.89 In terms of retailers' perception of the town centre, personal safety (52%) was the only aspect considered to be 'good' by a majority of traders. However, the following aspects were considered to be 'poor' by most respondents: entertainment/ leisure (79%); security (CCTV) (70%); pricing of car parks (63%); and the location and quality of car parks (50%). Respondents were subsequently asked to rate a number of measures that might improve the town centre. Almost all of the measures listed were popular with respondents, although the most popular were: cheaper off street parking (81%); entertainment/ leisure facilities (78%); greater promotion/ marketing of the centre (74%); and more independent/ specialist traders (71%). Notably 65% of businesses indicated that more food national multiples would harm the centre, whilst 62% felt that more non-food national multiples would harm the centre.

**Conclusions on Vitality and Viability**

4.90 In conclusion Church Stretton has been shown to be performing well as a centre. All retail and service sectors, except for the leisure services sector, are well provided for being above the national average for town centres. Church Stretton contains a broad range of traders predominantly in the independent sector. The centre is easily accessible and pedestrian friendly, whilst the environmental quality is good. The business survey revealed that the majority of traders were trading either moderately, well or very well at the current time. The lack of vacancies in Church Stretton is positive, but limits opportunities for new traders to come in to the centre.

## Cleobury Mortimer

4.91 Cleobury Mortimer is situated twelve miles east of Ludlow Town Centre close to the South Shropshire District Boundary. The defined Shopping Development area comprises parts of High Street and Church Street (which form the A4117) and is linear in nature. Cleobury Mortimer is the smallest of the five town centres in the District.

**Diversity of Uses**

4.92 Figure 4.22 demonstrates the composition of uses in Cleobury Mortimer at 2007 based on a site survey undertaken by WYG. The survey area is based on the defined Shopping Development area contained in the adopted Local Plan, and a land-use map of the centre is contained in this report at Appendix 6. The composition of the centre is compared to the national average for town centres, taken from Goad.

**Figure 4.22 Retail Composition of Cleobury Mortimer, 2007**

| Sector | No. of Outlets | % of Outlets | | Floorspace (sq. m) | % of Floorspace | |
|---|---|---|---|---|---|---|
| | | Cleobury Mortimer | GB | | Cleobury Mortimer | GB |
| Convenience | 7 | 17.50 | 8.47 | 1,036 | 23.02 | 13.87 |
| Comparison | 11 | 27.50 | 37.34 | 1,096 | 24.37 | 40.36 |
| Retail Service | 5 | 12.50 | 12.62 | 712 | 15.82 | 6.92 |
| Leisure Services | 9 | 22.50 | 20.67 | 1,020 | 22.66 | 22.34 |
| Financial & Business Services | 8 | 20.00 | 11.59 | 635 | 14.12 | 9.12 |
| Vacant | 0 | 0.00 | 9.30 | 0 | 0.00 | 7.39 |
| **TOTAL** | **40** | **100** | | **4,498** | **100** | |

Source: WYG (2007)
*No data is available for 2000

4.93 It is apparent that convenience provision in Cleobury Mortimer is strong, with 17.5% of units and 23.0% of floorspace in use for convenience purposes against respective national averages of 8.5% and 13.9%. The centre contains a total of seven convenience stores including a Spar and a Londis together with a range of independent traders, with additional provision provided outside of the defined Shopping Development area in the form of a Harry Tuffin's store on High Street (adjoining and part of the Texaco petrol filling station).

4.94 Comparison provision in Cleobury Mortimer Town Centre appears to be under-represented with both the proportion of comparison units (27.5%) and comparison floorspace (24.4%) below the national average (37.3% and 40.4% respectively). However, given the size of Cleobury Mortimer it would not be expected to have a large comparison sector, instead occupying a role in serving food and local service needs of the local population. The comparison stores which are present in the town are independents providing an individual retailer offer.

4.95 Retail services account for 12.5% of all outlets (including a Post Office) compared to an average nationally of 12.6%, whilst such uses account for 15.8% of floorspace against a 6.9% average. The centre is well provided in this sector, underlining the role of the centre in providing facilities for a local residents and passing trade on the A4117.

4.96 Leisure services account for an above average proportion of units (22.5% compared to an average of 20.7%) and an above average proportion of floorspace (22.7% compared to a national average of 22.3%) when compared to the average UK town centre, according to Goad. It is apparent from WYG's visits to the centre that it contains a good range of leisure service uses including a number of public houses, hotels and a restaurant.

4.97 Figure 4.22 indicates that financial and business services account for 20.0% of outlets in Cleobury Mortimer and 14.1% of floorspace which compares to national averages of 11.6% and 9.1% respectively. This sector includes a Lloyds TSB bank amongst other financial and business services.

4.98 In addition to the retail facilities outlined, the centre contains a Tourist Information Centre, a Church and a Market Hall/Business Support Centre.

**Street Level Vacancies**

4.99 No vacant units were recorded in Cleobury Mortimer at the time of the survey by WYG, highlighting the popularity of the centre with traders. This lack of available units will however present difficulties for traders seeking to locate in the centre, and it is important to encourage the retention of units for retail and leisure usage in the future, rather than conversions into residential dwellings as has occurred in parts of the defined Shopping Development area. No reliable data is available with regard to the demand for representation in Cleobury Mortimer.

**Commercial Rents and Yields**

4.100 There is no published data on rents or yields.

**Accessibility**

4.101 Cleobury Mortimer is situated on the A4117 which runs between Ludlow and Kidderminster (via the A456). Parking within the town is free with some on-street parking bays adjacent to the shops on High Street and Church Street, and an off-street car park located off Childe Road which is well-signposted. Buses (numbers 220, 132, 292, 296, 751 and 754) run through the town with services to Kidderminster, Ludlow and Birmingham amongst other destinations. Although Church Street and High Street are busy with vehicular transport (Figure 4.23), pavements in the centre are wide and set back from the road in places, meaning that the shopping environment is pedestrian friendly. A pedestrian crossing in the Shopping Development area would aid pedestrian movement. A pedestrian crossing and a streetscape enhancement are planned for completion in early 2008.

Figure 4.23: Cleobury Mortimer

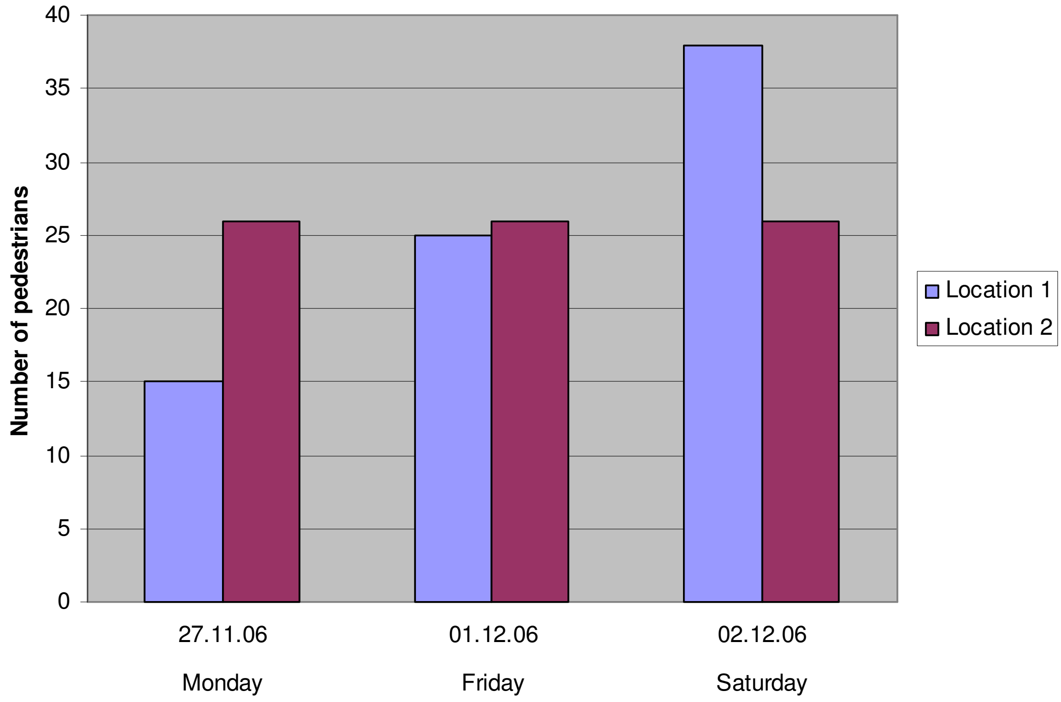
4.102 As part of the health check NEMS Market Research has undertaken a pedestrian count of movement around Cleobury Mortimer Town Centre. Two count points were identified: Church Street outside the Spar (Location 1); and outside Harry Tuffin's (Location 2). The number of passing pedestrians in both directions was counted over a five minute period at three points during the day: once in the morning (between 10.00 and 12.00); once at midday (between 12.00 and 14.00); and once in the afternoon (between 14.00 and 16.00). This process was repeated over three days: a Monday (27.11.06); a Friday (01.12.06); and a Saturday (02.12.06). The results were then indexed with the highest level of footfall bring afforded a top score of 100, and the subsequent indexed footfall being calculated accordingly. Figures 4.24 and 4.25 below show the results obtained through this process, and a the pedestrian count itself is contained at Appendix 4.

**Figure 4.24 Cleobury Mortimer pedestrian count (average and indexed number of pedestrians recorded)**

| Location | Date of count | | | Total Count | Total Index |
|---|---|---|---|---|---|
| | Monday 27.11.06 | Friday 01.12.06 | Saturday 02.12.06 | | |
| 1. Church Street outside the Spar | 15 | 25 | 38 | 78 | 100 |
| 2. Outside Harry Tuffin's | 26 | 26 | 26 | 78 | 100 |
| **TOTAL** | **41** | **51** | **64** | **156** | **-** |

Source: NEMS Market Research, 2006

**Figure 4.25 Cleobury Mortimer pedestrian count**




4.103 The pedestrian count data indicates that Saturday (02.12.06) was the busiest of the three days in terms of footfall, with 64 pedestrians recorded in total for both count points, compared to 51 on the Friday (01.12.06) and 41 on the Monday (27.11.06). Location 1 (Church Street outside Spar) and Location 2 (outside Harry Tuffin's) both recorded an equal number of pedestrians in total for the three survey days of 78 persons.

4.104 With respect to accessibility, the in-street survey undertaken by NEMS identified the following:

- 82% of visitors to Cleobury Mortimer had regular access to a car for personal use during the day and during the evening/ night-time;
- The most common method of arriving in the centre was driving a car/ van (80%) and by bus, minibus or coach (17%);
- Of those that drove 60% left their vehicle at Childe Road car park, with a further 35% parking on-street;
- Over half of drivers (52%) indicated that they did encounter difficulty when trying to obtain a car parking space on the day of the survey;
- 23% of people travelled for ten minutes or less to reach the centre, with 25% travelling for eleven to fifteen minutes, 23% travelled for between sixteen and twenty minutes and 22% and 20% travelling for over 20 minutes;

- Car parking provision was deemed to be ‘about the same’ in Cleobury Mortimer’ compared to other centres by 68% of visitors, although 28% considered it to be ‘better’ than in other centres; and
- Accessibility by public transport was considered by 75% of visitors to Cleobury Mortimer to be ‘about the same’ as other centres, although 23% felt that it was either ‘better’ or ‘much better’ than in other centres.

**Perception of Safety and Occurrence of Crime**

4.105 In terms of shopper safety during the day-time, the majority of visitors interviewed (60%) deemed this to be ‘about the same’ as in Cleobury Mortimer than in other centres which they visited. However, the remaining 40% of visitors considered day-time safety in Cleobury Mortimer to be either ‘better’ or ‘much better’ in the centre compared to other centres which they visited. With respect to safety during the evening/ night-time 52% indicated that this was ‘about the same’ as in other centres, with 48% stating that evening/ night-time safety in Cleobury Mortimer was ‘better’ or ‘much better’ than in other centres. Clearly Cleobury Mortimer is seen as a safe centre, with no respondents stating that safety during either the day or the evening/ night-time is ‘worse’ than in other centres.

**Customer Views and Behaviour**

4.106 The in-street survey undertaken by NEMS Market Research is contained at Appendix 3 indicated the following in respect of visitors to Cleobury Mortimer:

- Three-quarters of visitors to Cleobury Mortimer (75%) had travelled to the centre directly from home;
- Most of those interviewed (68%) indicated that they were not a visitor to the Cleobury Mortimer area;
- The most popular reasons given for visitors being in the centre were: to visit the bank/ building society/ Post Office (25%); for social/ leisure activities (25%); and to undertaken food and grocery shopping (13%);
- 58% of visitors planned to stay in the centre for two hours or less, with a further 28% planning to stay for half a day;
- 32% of visitors planned to undertake their main food shop on the day of the survey;
- 80% of visitors did not plan to purchase clothing and footwear goods on the day of the survey. Of these 37% last visited Kidderminster for such purposes; and
- When visitors were asked how often they visited the centre today compared to five years ago, 85% stated that they visited Cleobury Mortimer ‘about as frequently’.

4.107 Visitors to Cleobury Mortimer were asked to rate the centre on a number of aspects, compared to other shopping centres which they visited. This process identified that the quality of shops and cleanliness were viewed by half of all respondents as being 'better' or 'much better' than in other centres which respondents visited. However, the majority of aspects were considered to be 'about the same' in Cleobury Mortimer when compared to other centres which visitors used. Notably no aspects were considered to be 'worse' or 'much worse' in the centre than in other centres by a majority of visitors which is a positive sign.

**Environmental Quality**

4.108 The Shopping Development area of Cleobury Mortimer is compact and linear in form. The town centre is covered by a Conservation Area in recognition of its historic nature. Retail units throughout the town are maintained to a high standard, with the street being tree lined in places (Figure 4.26). Traditional buildings are interspersed between more modern units but this is done sensitively. Although the centre is dissected by the busy A4117, traffic along this road is generally slow moving and does not create associated problems of noise and pollution. Environmental quality is good.

Figure 4.26: High Street

**Business Surveys**

4.109 As part of this Study WYG, in conjunction with the Cleobury Mortimer Chamber of Trade, distributed a business survey to all traders in Cleobury Mortimer Town Centre. 37 surveys were delivered to local businesses of which 15 were returned: a response rate of 41%. The business survey, which is contained at Appendix 5, reveals that:

- Half of traders have been operating in Cleobury Mortimer for ten years or more;
- Since they began trading, 54% of respondents indicated that trade had either 'grown moderately' or 'grown significantly';
- With regard to current business performance, 43% were trading either 'very well' or 'well', with a further 36% trading 'moderately';
- 71% of respondents were owner occupiers, and the remaining 29% were leaseholders;
- 74 employees in total were employed the 15 businesses returning questionnaires. 64% of these were employed on a part-time basis;
- Local residents were relied upon by most traders (58%) as their primary source of business;

- 17% of respondents considered there to be an appropriate mix of shops and other non-retail uses in the centre, with half stating that there were too many non-retail uses. The remaining 33% indicated that there were not enough non-retail uses;
- Poor quality of the shopping centre environment and inadequate customer parking were deemed by the highest proportion of respondents (17% each) as being the biggest constraint on business performance;
- Half of respondents had no plans to alter their business in any way over the next five years, although 25% planned to either refurbish or extend their existing floorspace over this time; and
- Businesses in Ludlow were felt by the highest proportion of respondents (31%) to be their major competitor. This was followed by Kidderminster (27%).

4.110 Retailers were asked about their perceptions of the town centre. All aspects were rated as being either ‘average’ or ‘poor’ by the majority of respondents. Areas noted as being ‘poor’ by a majority of respondents were: location and quality of car parks (71%); security (CCTV) (69%); the market (69%); the range of shops and services (57%); events (57%); public toilets (57%); pedestrian environment (57%); cultural facilities (54%); and the shopping environment (50%). Popular ways of improving the town centre were recorded as being: an increased choice/ range of shops (93%); quality restaurants/ pavement cafes (93%); greater promotion/ marketing of the town centre (85%); improved security/CCTV (83%) ; and improved street paving (77%). Indeed all measure were considered to improve the town centre by a majority of respondents except for more food national multiples, which 54% of respondents felt would harm Cleobury Mortimer.

**Conclusions on Vitality and Viability**

4.111 Cleobury Mortimer is a vital and viable centre. Although the proportion of comparison retailers located within it is below the national average, in terms of both the proportion of floorspace and outlets occupied, all other retail and service sectors are adequately represented. Clearly the centre performs an important role in providing facilities to the local residents and passing motorists. The environmental quality of the centre is good as is accessibility, although the introduction of a pedestrian crossing will aid pedestrian movement. No vacancies exist in the town centre, which may restrict expansion of the retail sector and the role of the centre in the future.

## Craven Arms

4.112 Craven Arms is situated in the middle of the South Shropshire District on the crossroads of the A49 and B4368. Ludlow is situated some seven miles to the south on the A49, and Shrewsbury is approximately 19 miles to the north. Retailing in the town, as defined in the adopted Local Plan, comprises Corvedale Road, Dale Street and Market Street, together with the purpose-built Craven Centre and associated units on Shrewsbury Road.

**Diversity of Uses**

4.113 WYG has undertaken a site survey of the defined Town Centre to establish the diversity of uses present (Appendix 6). The size of retail units is determined using the ProMap mapping system which measures the footprint of buildings and gross floorspace. The results obtained have been grouped on the basis of the Goad categorisation of town centre uses, and have been compared to the national average for UK town centres at 2007 in Figure 4.27.

**Figure 4.27 Retail Composition of Craven Arms, 2007**

| **Sector** | **No. of Outlets** | **% of Outlets** | | **Floorspace (sq. m)** | **% of Floorspace** | |
|---|---|---|---|---|---|---|
| | | **Craven Arms** | **GB** | | **Craven Arms** | **GB** |
| Convenience | 6 | 13.33 | 8.47 | 3,378 | 40.97 | 13.87 |
| Comparison | 16 | 35.56 | 37.34 | 1,877 | 22.76 | 40.36 |
| Retail Service | 8 | 17.78 | 12.62 | 915 | 11.09 | 6.92 |
| Leisure Services | 6 | 13.33 | 20.67 | 1,008 | 12.22 | 22.34 |
| Financial & Business Services | 6 | 13.33 | 11.59 | 712 | 8.63 | 9.12 |
| Vacant | 3 | 6.67 | 9.30 | 357 | 4.32 | 7.39 |
| **TOTAL** | **45** | **100** | | **8,246** | **100** | |

Source: WYG (2007)
*No data is available for 2000

4.114 It is evident that convenience shopping facilities in Craven Arms are well provides for, with such retailers accounting for 13.3% of all outlets compared to the national average of 8.5%. Furthermore a significant 41.0% of floorspace in the centre is in use for convenience purposes against an average nationally of 13.9%. It is evident that the majority of this floorspace (87%) is accounted for by the large-format Harry Tuffin's store located in the Craven Centre, although the town centre also contains a Spar convenience store on Corvedale Road. A farmers' market also operates in the town centre on a monthly basis.

4.115 The proportion of units and floorspace occupied in the comparison retail sector is below the national average. With regard to the proportion of units, 35.6% are in use for comparison goods purposes which compares with a national average of 37.3%. Moreover, 22.8% of floorspace in the centre is in use for comparison retailing purposes compared to 40.4% nationally. Comparison provision is in the centre is in the form of independent traders selling a variety of goods. It is clear that Craven Arms performs a mainly convenience shopping role for the catchment area which it serves.

4.116 Retail services are well-represented in the town centre, occupying some 17.8% of all units and 11.1% of floorspace compared to respective national averages of 12.6% and 6.9%. Craven Arms centre has eight retail service units, including a Post Office on Corvedale Road.

4.117 Leisure services in the centre appear to be under-provided for, accounting for 13.3% of all outlets against an average of 20.7%. Such uses account for 12.2% of floorspace which compares to a national average of 22.3%. Within this category Craven Arms contains a number of public houses, take-aways and restaurants.

4.118 Figure 4.27 demonstrates that financial and business services account for 13.3% of units which is above the national average of 11.6%. However in terms of the proportion of retail floorspace occupied (8.6%) is below the national average (9.1%). Craven Arms contains HSBC and Barclays banks together with an array of other services.

4.119 As well as the retail and leisure facilities on offer in the town centre it contains The Gateway office development, which houses Shropshire County Council, Shropshire Primary Care Trust and South Shropshire Housing Association. A Tourist Information Centre is located in the 'Discovery Centre' on the outskirts of the town. 'The National Museum of British Popular Culture' is located in the town centre on the junction of Market Street and Dale Street. A library is situated adjacent to the defined Shopping Development Area.

**Street Level Vacancies**

4.120 Figure 4.27 indicates that at the time of the WYG survey the town centre contained just three vacant units comprising 357 sq m of retail floorspace. This equates to 6.7% of total units against a national average of 9.3%, and 4.3% of all floorspace compared to a national average of 7.4%. All the vacant units in the town centre are situated on Corvedale Road. Whilst two of the vacancies are of relatively good quality (Figure 4.28), it is evident that the former Labour Club is of poor quality and detracts from the environmental quality of the town centre.

Figure 4.28: Vacant unit on Corvedale Road

**Commercial Rents and Yields**

4.121 Due to the modest size of Craven Arms there is no published data on rents or yields available.

**Accessibility**

4.122 Craven Arms is situated on the junction of the A49 and the B4368. The A49 connects the centre to Church Stretton and Shrewsbury to the north and Ludlow and Hereford to the south. The town centre itself offers on-street parking together with the Council run Corvedale Road off-road parking facility. Additionally Harry Tuffin's has dedicated off-road parking. Whilst the Harry Tuffin's car park is free for customers and on-street parking is free, there is a charge for the Corvedale Road Car Park although this is not considered excessive at 40p for one hour, 80p for two hours, £2.00 for up top four fours and £3.00 for all day parking.

4.123 Craven Arms has a railway station situated approximately 500 metres to the north of the town centre. Trains provide direct links to Manchester, Cardiff, Shrewsbury, Hereford and Crewe. Buses also run through the town centre on a regular basis providing links to Shrewsbury, Ludlow and Church Stretton in addition to other local destinations.

4.124 With regard to pedestrian movement around the centre this is relatively unproblematic and assisted by comprehensive and clear signage. However, the Craven Centre and adjacent retail units are severed from the rest of the centre by the busy Shrewsbury Road which forms part of the A49. As such it does feel detached from the rest of the town centre, although one pedestrian crossing linked to traffic lights is provided next to The Gateway and another is located on Corvedale Road (Figure 4.29).

Figure 4.29: Pedestrian crossing

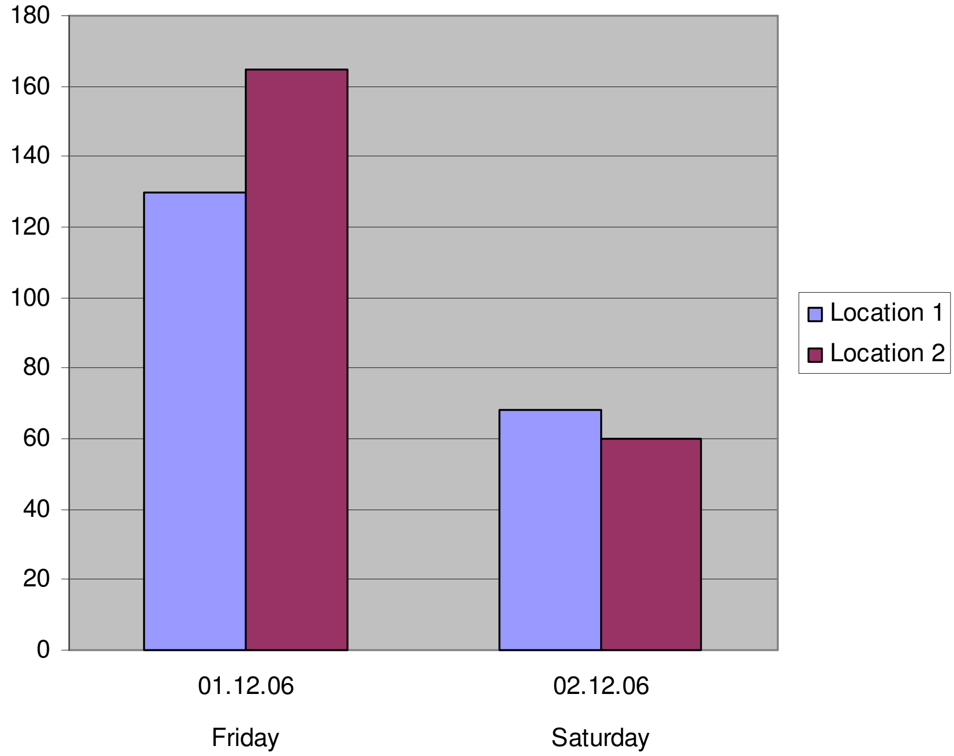
4.125 As part of the health check NEMS Market Research undertook a pedestrian count of movement around Craven Arms Town Centre. Two count points were identified: Corvedale Road outside the Post Office (Location 1); and Shrewsbury Road outside Harry Tuffin's (Location 2). The number of passing pedestrians in both directions was counted over a five minute period at three points during the day: once in the morning (between 10.00 and 12.00); once at midday (between 12.00 and 14.00); and once in the afternoon (between 14.00 and 16.00). This process was repeated over two days: a Friday (01.12.06); and a Saturday (02.12.06). The results were then indexed with the highest level of footfall being calculated accordingly. Figures 4.30 and 4.31 show the results obtained through this process with the full results being contained at Appendix 4.

**Figure 4.30 Craven Arms pedestrian count (average and indexed number of pedestrians recorded)**

| Location | Date of count | | Total Count | Total Index |
|---|---|---|---|---|
| | **Friday 01.12.06** | **Saturday 02.12.06** | | |
| 1. Corvedale Road | 130 | 68 | 198 | 88 |
| 2. Shrewsbury Road | 165 | 60 | 225 | 100 |
| **TOTAL** | **295** | **128** | **423** | **-** |

Source: NEMS Market Research, 2006

**Figure 4.31 Craven Arms pedestrian count**




4.126 The pedestrian count data indicates that Friday (01.12.06) was the busiest of the two days in terms of footfall, with 295 pedestrians recorded in total for both count points, compared to 128 pedestrians on the Saturday (02.12.06). Location 2 (Shrewsbury Road) recorded the greatest number of pedestrians overall with a total count for the two survey days of 225 persons, compared to 198 persons counted at Location 1 (Shrewsbury Road).

4.127 With regard to accessibility, the in-street survey undertaken by NEMS identified the following:

- 73% of visitors had regular access to a car for personal use during the day and during the evening/ night-time;
- The most common method of arriving in the centre was driving a car/ van (70%) followed by arriving on foot (25%);

- Of those that drove the most popular place to park was in Corvedale car park (49%), with a further 42% of visitors parking on street;
- The majority of drivers (92%) had no difficulty in obtaining a car parking space on the day of the interview;
- Most respondents (70%) had travelled for ten minutes or less to reach Craven Arms;
- Car parking provision was deemed by 39% of visitors to be ‘about the same’ in Craven Arms compared to other centres, although 44% considered it to be ‘better’ or much better than in other centres;
- Car parking prices were considered by 46% of visitors to be ‘better’ or ‘much better’ in Craven Arms than in other centres, with a further 46% deeming prices to be ‘about the same’ as in other centres which they frequented[1]; and
- Accessibility by public transport was considered by 54% of visitors to Craven Arms to be ‘about the same’ as other centres, although 26% indicated that it was either ‘better’ or ‘much better’ than other centres which they visited.

**Perception of Safety and Occurrence of Crime**

4.128 In terms of shopper safety during the day-time, the majority of visitors interviewed (54%) deemed this to be ‘about the same’ in Craven Arms compared to other centres which they visited. However, a further 41% of visitors considered day-time safety in Craven Arms to be either ‘better’ or ‘much better’ than in other centres. The remaining 5% of visitors indicated that they did not know either way, and notably no visitors indicated that they felt that day-time safety in Craven Arms was either ‘worse’ or ‘much worse’ when compared to other centres which they visited. With regard to safety during the evening/ night-time 46% indicated that this was ‘about the same’ as in other centres, with 26% stating that evening/ night-time safety in Craven Arms was either ‘better’ or ‘much better’ than in other centres.

**Customer Views and Behaviour**

4.129 The in-street survey undertaken by NEMS Market Research indicated the following in respect of visitors to Craven Arms:

- Most visitors to Craven Arms (86%) had travelled to the centre directly from home;
- Most of those interviewed (88%) indicated that they were not a visitor to the South Shropshire area;
- The most popular response recorded from visitors in relation to their purposes in Craven Arms was to undertake food and grocery shopping, accounting for three-quarters of visitors;
- The vast ,majority of visitors to the centre (95%) planned to stay for up to two hours;

- 88% of visitors indicated that they planned to undertake their main food shop on the day of the survey. Of these, 60% stated that they visited Craven Arms at least once a week for such purposes;
- 98% of visitors did not plan to purchase any clothing and footwear goods on the day of the survey, with the majority of these people (53%) last visiting Shrewsbury Town Centre for such purposes; and
- When visitors were asked how often they visited the centre today compared to five years ago, most (76%) stated that they visited Craven Arms 'about as frequently'.

4.130 Visitors to Craven Arms were asked to rate the centre on a number of aspects, compared to other shopping centres which they visited. Whilst the majority of aspects listed were considered to be 'about the same' in Craven Arms when compared with other centres which they visited, choice of shops (70%) and quality of shops (51%) which were both deemed to be either 'worse' or 'much worse' in Craven Arms than in other centres.

**Environmental Quality**

4.131 Dale Street and Market Street all from part of a Conservation Area as designated in the Local Plan, and the environmental quality of this area is good. Elsewhere in the centre environmental quality can be more variable. Units are generally well maintained (Figure 3.32), and the town centre is generally clean and tidy. Bins, benches and street lighting are provided throughout the centre, and the recent pavement scheme around The Gateway development provides an attractive street-scape and a useable public space.

Figure 4.32: The Craven Arms public house

4.132 The former Craven Arms Labour Club is of poor visual quality having a run-down appearance and it would be beneficial to secure an alternative use for this unit. The Craven Centre and adjacent units are separated from the rest of the town, and strong links between this area and the rest of the town centre would aid in securing more linked trips between the two areas.

**Business Surveys**

4.133 WYG, in conjunction with the Craven Arms Business Network, distributed a business survey to all businesses within the defined Craven Arms Town Centre. Through this process a total of 58 business surveys were delivered with 24 being returned: a response rate of 41%. The full results of the business survey are contained at Appendix 5. In summary:

[1] At the time of the Survey, no car parking charges in Craven Arms were in place; these have since been introduced.

- Most respondents (61%) had been trading in Craven Arms for over ten years, with the remaining 39% having been in operation for under five years;
- A little over half of respondents (57%) indicated that their business had ‘grown moderately’ since start-up;
- When asked to rate current trading performance, 70% of respondents stated that they were trading either ‘well’ or ‘very well’;
- 61% of traders leased their premises, with 39% being owner occupies;
- Respondents employed a total of 105 people: 63% full-time and 37% part-time;
- Other residents in the wider South Shropshire area were relied upon by 37% of respondents as their primary source of business, with a further 32% primarily relying upon local residents. Notably 18% of businesses relied primarily on tourist/ leisure visitors;
- 38% of respondents considered Craven Arms to have a good balance between shops and other non-retail uses, although 33% stated that there were too many non-retail uses and conversely 29% stated that there were too few non-retail uses;
- The main constraint on business performance was deemed to be inadequate customer parking which 21% of respondents registered as their biggest constraint. This was followed by poor quality shopping environment (19%), high rents/ overheads (12%) and lack of day/ tourist visitors to the town (12%);
- 55% of respondents had no plans to alter their business in any way over the next five years, although 25% planned to either refurbish or extend their existing floorspace over the next five years; and
- Ludlow was considered to be their main competitor by the greatest proportion of respondents (39%).

4.134 Respondents were asked to rate the town centre in a number of different areas. Most aspects were considered to be average by the largest proportion of respondents, although aspects felt to be ‘poor’ by most respondents comprised: entertainment/ leisure (74%); cultural facilities (64%); and the market (52%). Respondents were also asked to consider a range of measures to improve the town centre. Most measures were seen to be beneficial for the town centre, with the most popular measures being more independent/ specialist traders, which 87% of respondents felt would improve the centre, followed by an increased choice/ range of shops (82%) and greater promotion/ marketing of the town centre (77%).

4.135 At the request of the Craven Arms Business Network a number of additional questions were included in the business survey. Three questions were asked concerning a number of changes in the retail landscape of the town centre, and whether these had had a positive or a negative effect on the trading environment within Craven Arms. The Redevelopment of the Auction Yard site was felt to have had a positive impact on trading by most (56%) of respondents, although some 35% felt that it had had no effect. With respect to the alterations to the Corvedale Road layout over three-quarters of respondents (78%) felt that this had resulted in a negative effect on trading performance. Finally the renovation of the Craven Arms Hotel was felt by 59% of respondents to have had a positive effect on trading performance, with a further 36% indicated that it had had no effect.

**Conclusions on Vitality and Viability**

4.136 In summary Craven Arms has been shown to be primarily a destination for convenience goods shopping. Representation in the convenience sector is well above the national average in respect of both the proportion of units and the proportion of floorspace for which it accounts, and three-quarters of visitors questioned by NEMS were visiting the centre for food and grocery shopping purposes. The centre is accessible by a range of means of transport and for the most part environmental quality is good. Notwithstanding this, links between the Craven centre and the rest of the town centre could be improved and would require a reprioritisation in favour of pedestrian linkages ahead of car-borne travel.

## Conclusion

4.137 This Section has shown Ludlow to be the principal centre within the District, having some 32,051 sq m (gross) of retail floorspace which is well above that of Bishop's Castle (7,214 sq m), Church Stretton (10,045 sq m), Cleobury Mortimer (4,498 sq m) and Craven Arms (8,246 sq m). Ludlow provides an important convenience and comparison shopping role for the District, with the four smaller town centres performing a more localised service for their catchment populations. Each centre provides a different shopping experience as all are dominated by independent traders; tourism is clearly an important part of each centres' operation. The environmental quality of all the centres is good, and it is notable that at least part of the defined Shopping Development area in each of the five town centres fall within a defined Conservation Area.

4.138 Ludlow is a strong and healthy centre, with an outstanding demand for representation in the town from a broad range of retailers. Yields have fallen in recent years and rental levels are high compared to other centres of a similar size. The vacancy rate is low, and all indicators of vitality and viability point towards a successful centre. The only issues to address in Ludlow are the proportion of service uses, which are below the national average, and the dominance in the food retail sector by the Tesco foodstore, to the extent that, as quantified in Section 7 of this report, the foodstore is overtrading considerably.

4.139 Bishop's Castle is a strong convenience retail destination and a viable town centre. Its vacancy rate is low and the environmental quality is good. Accessibility by public transport is highlighted as a key weakness by both shoppers and businesses. Church Stretton performs well, is accessible and pedestrian friendly and has a broad range of comparison retailers. There are no vacant units in the town, which is a sign of a centre being vital and viable. This can be a drawback in a centre too, if a lack of available premises limits opportunities for businesses seeking new or extended premises in the town.

4.140 Cleobury Mortimer is a strong convenience destination, but the proportion of comparison retailers and floorspace occupied is below the national average. The introduction of a pedestrian crossing and townscape improvements are positive moves towards protecting the town centres vitality and viability. Craven Arms is principally a convenience goods shopping destination. It is accessible by a range of means of transport and environmental quality is good. To improve links between the Craven Centre and the remainder of the town centre would greatly improve the integrated function of the town.

# 5 SHOPPING IN SOUTH SHROPSHIRE

## The Telephone Survey

5.1 The Study Area is shown on the plans at Appendix 1.

5.2 The analyses of the telephone survey exclude the 'don't know/ varies/ no pattern' and 'don't regularly buy' responses.

5.3 Normal convenience shopping patterns will comprise of more than one destination and the assessment is divided into main-convenience and top-up shopping. The assessment assumes that 80% of spending is directed to main convenience shopping and the residual 20% is directed to top-up shopping. There is no set rule for this breakdown, but the WYG estimates are reflective of standard practice in the completion of retail studies.

5.4 In respect of comparison shopping, a proportion of spending power is apportioned to five categories of comparison goods: Electrical; Furniture; and DIY; (which together comprise bulky goods); and clothing and footwear and other household goods, (which together comprise non-bulky goods). The proportion of expenditure directed towards each category has been derived from the Experian MicromarketerG3 reports for each of the six Survey Areas. However, it should be noted that PPS6 does not distinguish between comparison goods type. PPS6 stipulates that when assessing quantitative need for additional development, expenditure levels should relate to the class of goods to be sold within the broad categories of 'convenience' and 'comparison' goods. However, both 'bulky' and 'non-bulky' goods within the comparison goods sector have been analysed for the purposes of this Study in order to provide a qualitative assessment.

5.5 The analyses below are based upon the interviewees' main destinations for convenience shopping ('main-convenience' and 'top-up' shopping) and for comparison shopping ('non-bulky goods', 'bulky goods' and 'DIY goods'). The statistical analysis (Appendix 8) assesses market share in main convenience, top-up convenience and the comparison sectors and then combines the convenience and comparison data sets to provide a capacity assessment for the broad convenience and comparison retail goods categories as is advised by PPS6.

5.6 Whilst the household Study Area comprised six zones, in the assessment below Zone 6 (Leominster) has been excluded from the analysis as it falls entirely within Herefordshire. Consequently, the analysis below relates to Zones 1 to 5 of the Study Area which covers the whole of the South Shropshire District Council administrative area. Zone 6 was included in the survey because it was our belief that the South Shropshire District was likely to draw from this Zone. However, whilst there is a modest attraction of expenditure from Zone 6 it unfairly represents the performance of the District if Zone 6 were included in the analysis of the retention of expenditure.

5.7 The market shares given below are based on the proportion of expenditure attracted by each destination, as opposed to the proportion of shopping trips. In addition it should be noted that within different comparison goods sectors there will be internal dynamics which affect provision within a town centre. For example, although a centre may appear to be well represented in the 'clothing and footwear' goods sector, within this sector there may be a lack of certain types of trader for example children's clothes shops.

## Comparison Shopping

### *Non Bulky Goods - Clothing and Footwear Goods*

**Destinations within South Shropshire District as a whole account for 8.8% of clothing and footwear expenditure by residents in Zones 1 to 5. Ludlow is the principal destination in the District attaining a market share of 6.5% of expenditure. This is followed by Church Stretton (1.4%), Craven Arms (0.6%) and Bishop's Castle (0.3%). No residents indicated that they shopped in Cleobury Mortimer for clothing and footwear goods.**

**The majority (85.3%) of clothing and footwear expenditure in Zones 1 to 5 is directed towards destinations that fall outside of the District. This expenditure is predominately directed towards Shrewsbury Town Centre (32.5%), Kidderminster Town Centre (14.1%) and Hereford Town Centre (9.9%). This high leakage to Shrewsbury is unsurprising given that the majority of Zone 4 (Church Stretton) falls within Shrewsbury and Atcham Borough. Internet sales account for a further 5.9% of expenditure in this sector.**

**Ludlow draws the largest proportion of expenditure from Zone 1, within which the town centre attracts some 15.8% of total expenditure. Ludlow also draws clothing and footwear expenditure from Zone 3 (12.5%), Zone 2 (3.9%) and Zone 6 (1.1%). Church Stretton draws all of its expenditure from Zone 4, Craven Arms draws from Zone 1 (1.1%) and Zone 3 (2.1%), and Bishop's Castle draws from Zone 3 (1.0%) and Zone 5 (1.1%).**

**With respect to leakage in the clothing and footwear sector, in Zone 1 this is principally to Hereford Town Centre (25.3%), Kidderminster Town Centre (13.7%) and Shrewsbury Town Centre (12.6%). In Zone 2 leakage was mainly to Kidderminster Town Centre (45.6%) and Worcester Town Centre (19.2%). In Zone 3 leakage was spread between Shrewsbury Town Centre (30.2%), Hereford Town Centre (13.5%) and Telford Town Centre (13.5%). With regard to Zone 4 Shrewsbury Town Centre accounted for over half (66.3%) of clothing and footwear expenditure by residents in this zone, whilst in Zone 5 Shrewsbury Town Centre was also the most popular destination with 66.0% of expenditure.**

**In general terms, the District is not serving well the clothing and footwear shopping needs of the South Shropshire's population. Market share is greatest in the Ludlow area with Ludlow Town Centre being the principal clothes and footwear shopping destination in the District. The other centres in the District provide a more limited role in the clothing and footwear sector.**

*Non Bulky Goods - Other Household Goods*

**The market share of Ludlow across Zones 1 to 5 in the other household goods sector is 12.7%. Other destinations in South Shropshire account for just 1.1% of expenditure generated by residents in Zones 1 to 5. This is split between Church Stretton (0.6%), Craven Arms (0.3%) and Bishop's Castle (0.2%).**

**In total 13.8% of other household goods expenditure is retained within South Shropshire, 67.2% is directed towards destinations outside of the District and the residual 19.0% is spent over the internet, by mail order or home delivery services. Leakage is to a variety of destinations, although Shrewsbury Town centre has the largest market share of 27.3%.**

**Ludlow Town Centre attracts other household goods expenditure from the following zones: Zone 1 (30%), Zone 2 (7.0%), Zone 3 (24.7%) and Zone 5 (1.3%). Church Stretton draws solely from Zone 4 within which it accounts for 2.7% of expenditure. Craven Arms other household goods expenditure from Zone 2 (0.6%) and Zone 3 (1.2%), whilst Bishop's Castle draws expenditure from Zone 5 (1.3%) solely.**

**As discussed above leakage is primarily to Shrewsbury Town Centre. This is most significant in Zone 4, within which it has a market share of 58.7%, in Zone 5 where it has a market share of 51.3% and Zone 3 where it has a 24.7% market share. Other important other household goods destinations include Kidderminster Town Centre which has a 35.0% market share in Zone 2, and Leominster Town Centre which has a market share of 29.1%.**

**Internet/ catalogue/ mail order spending accounts for a significant proportion of expenditure in all of the five survey zones.**

*Overall Non Bulky Shopping Patterns*

5.8 Market Shares in the non bulky sector in Zones 1 to 5 are:

- Bishop's Castle **0.3%;**
- Church Stretton **0.8%;**
- Craven Arms **0.4%;**
- Ludlow **10.7%;**
- Birmingham City Council Area **1.3%;**
- Dudley MBC **1.5%;**
- Herefordshire Council Area **8.3%;**
- Powys County Council Area **3.4%;**
- Shrewsbury & Atcham BC Area **29.7%;**
- Telford and Wrekin BC Area **6.0%;**
- Worcester City Council Area **4.4%;**
- Wyre Forest DC Area **11.5%;**
- Other **6.9%; and**
- Internet/ home delivery/ mail order **14.8%.**

*Bulky Goods / DIY Goods*

*Electrical Goods*

**In the Electrical goods sector 12.8% of expenditure by residents in Zones 1 to 5 is retained by destinations within South Shropshire. 74.3% of expenditure by residents in Zones 1 to 5 is directed towards destinations outside of the Study Area and 12.9% is spent via the internet/ home delivery/ mail order.**

**Destinations within the District that attract a proportion of electrical expenditure from Zones 1 to 5 comprise Ludlow Town Centre (7.0%), Church Stretton Town Centre (4.5%), Cleobury Mortimer Town Centre (0.7%) and Craven Arms Town Centre (0.6%). Popular destinations for electrical goods shopping located outside of the District include Shrewsbury Town Centre (24.9%), Kidderminster Town Centre (11.1%) and Hereford Town Centre (6.6%).**

**It is notable that destinations in South Shropshire do not draw any expenditure whatsoever from Zone 5. In Zone 1 however Ludlow has a market share of 22.1% and Church Stretton has a market share of 1.2%. In Zone 2 Cleobury Mortimer draws 3.0% of total expenditure on electrical goods. In Zone 3 Ludlow has a market share of 12.2% whilst Church Stretton and Craven Arms both have a market share of 5.6%. In addition Church Stretton Town Centre has a market share of 16.7% in Zone 4.**

**Overall expenditure on electrical goods in Zone 1 is split amongst a variety of destinations, including Ludlow (22.1%), Hereford Town Centre (18.6%), Kidderminster Town Centre (10.5%) and Shrewsbury Town Centre (10.5%). In Zone 2 the principal shopping destinations Kidderminster Town Centre (34.9%) and Tenbury Wells Town Centre (16.9%). The main shopping destination in Zone 3 is Shrewsbury Town Centre which attracts a third (33.3%) of expenditure by residents in the zone. In Zone 4 Shrewsbury Town Centre is also the most popular destination with a market share of expenditure of 39.3%, whilst a further 17.9% is accounted for by the Meole Brace Retail Park in Shrewsbury. Shrewsbury accounts for the majority 54.7% of electrical goods expenditure in Zone 5.**

*Furniture and Carpet Goods*

**The results of the household survey indicate that within Zones 1 to 5 some 12.2% of expenditure on furniture and carpet goods is retained within South Shropshire, with 81.2% being directed towards destinations outside of the District and 6.5% being sent via the internet/ home delivery/ mail order. The principal destinations identified for furniture and carpet shopping are: Shrewsbury Town Centre (25.3% of expenditure), Kidderminster Town Centre (12.6%) and Hereford Town centre (8.5%).**

**Destinations within South Shropshire that attract a proportion of expenditure in furniture and carpet shopping are: Ludlow Town Centre (9.3%), Church Stretton Town Centre (1.9%) Craven Arms Town Centre (0.8%) and Bishop's Castle Town Centre (0.3%). Destinations in South Shropshire draw from all of the five Study Zones. Ludlow Town Centre draws expenditure from Zone 1(25.4%), Zone 2 (2.5%) and Zone 3 (14.5%)). Bishop's Castle draws all of its trade from Zone 5, in which it has a market share of 1.4%, whilst Craven Arms draws from only Zone 3, having a market share of 5.3%. Church Stretton draws from Zone 3 (1.3%) and Zone 4 (9.2%). Cleobury Mortimer does not attract any furniture and carpet expenditure from Zones 1 to 5, which is unsurprising considering that it contains no furniture and carpet stores.**

**The market share of destinations in South Shropshire was highest in Zone 1 and Zone 3, within which it retained 25.4% and 21.1% of expenditure respectively and lowest in Zone 5 (1.4%).**

**In Zone 1 the destination which recorded the greatest market share was Ludlow Town Centre (25.4%), followed by Hereford Town Centre (22.5%). In Zone 2 Kidderminster Town Centre recorded the greatest**

market share of furniture and carpet goods of 39.7%. Shrewsbury Town Centre was the single most popular destination for furniture and carpet goods in Zone 3 (32.9%), Zone 4(46.2%) and Zone 5 (50.0%).

*DIY Goods*

**South Shropshire retains a higher proportion of DIY goods expenditure than that recorded for other types of bulky and non-bulky goods. Destinations in South Shropshire recorded a market share of 22.9% of DIY goods from Zones 1 to 5: this is split between Ludlow Town Centre (15.5%), Church Stretton Town Centre (3.1%), Bishop's Castle Town Centre (2.1%), Craven Arms Town Centre (1.3%) and Cleobury Mortimer Town Centre (1.0%). Retention is highest in Zone 1, within which 51.1% of DIY expenditure is retained in the District, and in Zone 3 in which destinations in South Shropshire have a market share of 29.8%.**

**75.6% of DIY goods expenditure in Zones 1 to 5 is directed towards destinations outside of the District, principally to Shrewsbury Town Centre (23.1%), and 1.5% is spent via the internet/ home delivery/ mail order.**

**In terms of individual zones, In Zone 1 Ludlow Town Centre is the destination which attracts the highest proportion of expenditure, accounting for 51.1% of total DIY goods expenditure by residents in this zone. Kidderminster Town Centre is the principal DIY goods destination in Zone 2, attracting 46.5% of expenditure. In Zones 3, 4 and 5 Shrewsbury Town centre attracts the greatest proportion of DIY goods expenditure, recording respective market shares of 27.4%, 53.4% and 40.2%. In Zone 5 however, Newtown Town Centre is also a key destination recording a market share of 35.4%.**

**In terms of the draw of destinations within the District, Ludlow Town Centre attracts expenditure from Zones 1 to 4: it has a market share of 51.1% in Zone 1, 7.0% in Zone 2, 29.8% in Zone 3 and 16.4% in Zone 4. Bishop's Castle Town Centre draws from Zone 3, having a 3.6% market share, and Zone 5 in which it has an 8.5% market share. Cleobury Mortimer Town Centre attracts expenditure solely from Zone 2 (4.5%). Craven Arms Town Centre draws from Zone 3 (7.1%) and Zone 4 (1.4%), whilst Church Stretton Town Centre attracts expenditure from Zone 3 (1.2%) and Zone 4 (13.7%).**

*Overall Bulky Shopping Patterns*

5.9 Market Shares in the bulky sector in Zones 1 to 5 are:

- Bishop's Castle **0.7%;**
- Church Stretton **3.2%;**
- Cleobury Mortimer **0.5%;**
- Craven Arms **0.9%;**
- Ludlow **10.1%;**
- Birmingham City Council Area **1.4%;**
- Herefordshire Council Area **10.4%;**
- Malvern Hills DC Area **3.8%;**
- Powys County Council Area **6.5%;**
- Shrewsbury & Atcham BC Area **29.5%;**
- Telford and Wrekin BC Area **3.0%;**
- Worcester City Council Area **1.6%;**
- Wyre Forest DC Area **14.2%;**
- Other **6.7%; and**
- Internet/ home delivery/ mail order **7.5%.**

*The Role of Comparison Stores in the District*

5.10 The Household Survey records the following overall comparison goods market shares:

| | |
|---|---|
| ▪ Bishop's Castle | **0.4%;** |
| ▪ Church Stretton | **1.5%;** |
| ▪ Cleobury Mortimer | **0.2%;** |
| ▪ Craven Arms | **0.5%;** |
| ▪ Ludlow | **10.5%;** |
| ▪ Birmingham City Council Area | **1.4%;** |
| ▪ Herefordshire Council Area | **9.0%;** |
| ▪ Malvern Hills DC Area | **1.9%;** |
| ▪ Powys County Council | **4.4%;** |
| ▪ Shrewsbury & Atcham BC Area | **29.6%;** |
| ▪ Telford and Wrekin BC Area | **5.1%;** |
| ▪ Worcester City Council Area | **3.5%;** |
| ▪ Wyre Forest DC Area | **12.4%;** |
| ▪ Other | **7.0%; and** |
| ▪ Internet/ home delivery/ mail order | **12.6%.** |

5.11 The survey findings for comparison goods suggest that the town centres in the District are not seen as principal destinations for comparison shopping. Only Ludlow Town Centre, with a market share of 10.5%, recorded any meaningful proportion of comparison expenditure by residents across Zones 1 to 5.

5.12 In the clothing and footwear sector, nearly 92% of spending is directed to destinations outside of the District. In the other household goods sector, the leakage recorded is 86% of all spending, of which a significant 19% is accounted for by the internet/ home delivery/ mail order. The pattern is repeated in the bulky goods sector, where 88% of spending on furniture and carpets, 87% of spending on electrical items and 77% of spending on DIY goods is directed to destinations outside of the District.

5.13 The household survey indicates that, in contrast with higher-order centres in neighbouring authorities, the comparison retail facilities in the South Shropshire area are not being used currently by a significant proportion of the shopping public. It should be reiterated here, however, that the boundaries of Zones 1 to 5 extend beyond the boundaries of South Shropshire District. Outside of the District, the key centres which attract comparison expenditure from these zones are Shrewsbury Town Centre (28% overall), Kidderminster Town Centre (12%) and Hereford Town Centre (7%).

5.14 Penetration maps showing the draw of the District as a whole, as well as the five town centres within it, in terms of comparison goods is contained in this Study at **Appendix 9**.

These maps show the percentage of comparison goods expenditure retained by the destinations within Zones 1 to 5.

## Convenience Shopping

*Main Convenience Shopping*

**Convenience shopping patterns show a greater degree of dispersal than comparison patterns, and more of convenience expenditure of Zones 1 to 5 is retained within the District when considered against comparison expenditure. In terms of main food expenditure in Zones 1 to 5, 46.7% is directed towards destinations inside South Shropshire. Within the District the most popular shopping destination by a significant margin is the Tesco, Station Drive, Ludlow, which has a market share of 27.1%. This is the greatest market share of any individual store. 52.7% of convenience expenditure is spent outside of the District, with 0.6% being spent via the internet. The most popular store located outside of the District is the Sainsbury's, Meole Brace Retail Park, Shrewsbury (9.8%).**

**The breakdown of main convenience shopping patterns recorded in the individual zones in the Study Area is as follows:**

**In Zone 1 – 89.9% of main convenience spending is directed to Ludlow and the District retains 91.9% of main food shopping expenditure. The most significant store is Tesco, Station Drive, Ludlow, which as a market share of 75.8%.**

**In Zone 2 – 16.5% of main convenience spending is directed to Ludlow, 3.1% is directed to Cleobury Mortimer and the District retains 19.6% of expenditure. 44.95 of expenditure is accounted for by Kidderminster.**

**In Zone 3 – 71.1% of main convenience spending is retained by destinations within South Shropshire. These comprise Ludlow (38.1%), Craven Arms (26.8%), local shops (4.1%), Bishop's Castle (1.0%) and Church Stretton (1.0%).**

**In Zone 4 – 21% of main convenience spending directed towards facilities in South Shropshire, Split between Church Stretton (18.0%), Craven Arms (2.0%) and Ludlow (1.0%). The majority of expenditure (68.0%) is accounted for by Shrewsbury.**

**In Zone 5 – 27.5% of main convenience spending accounted for by destinations in South Shropshire, namely Church Stretton (20.4%) and Bishop's Castle (7.1%). 38.8% of main food expenditure is directed towards facilities in Shrewsbury.**

5.15 The pattern of main convenience shopping in Zones 1 to 5 recorded by the Household Survey is:

- Bishop's Castle **1.5%;**
- Church Stoke **4.1%;**
- Church Stretton **3.8%;**
- Cleobury Mortimer **0.7%;**
- Craven Arms **4.7%;**
- Ludlow **31.6%;**
- Other, South Shropshire **0.3%;**
- Bridgnorth DC Area **1.3%;**
- Herefordshire Council Area **4.7%;**

- Malvern Hills DC Area **5.2%;**
- Powys County Council Area **5.7%;**
- Shrewsbury & Atcham BC Area **21.6%;**
- Telford and Wrekin BC Area **1.7%;**
- Wyre Forest DC Area **11.3%;**
- Other **1.2%; and**
- Internet/ online **0.6%.**

*Top-up Shopping*

**The Household Survey also recorded top-up convenience shopping patterns. Top-up convenience shopping is more localized, and consequently the majority of expenditure by residents in Zones 1 to 5 is retained by destinations within South Shropshire District. South Shropshire has a market share of 56.0% in the top-up convenience goods sector. Destinations in the District have the following market shares across Zones 1 to 5: Ludlow (22.0%), Church Stretton (8.2%), Cleobury Mortimer (6.7%), Craven Arms (6.6%), Bishop's Castle (4.4%) and Church Stoke (3.0%), with other stores in the District accounting for a further 5.0%.**

**44.0% of top-up food expenditure is directed towards destinations outside of the District. This is directed towards a wide range of destinations, with the greatest market share being recorded in Shrewsbury (5.0%).**

**Patterns of top-up convenience shopping recorded in the sub-zones are as follows:**

**Zone 1 – 89.4% of top-up expenditure is identified to be directed towards destinations in South Shropshire, principally Ludlow which has a market share of 80.4%.**

**Zone 2 – 31.9% of expenditure is retained by destinations inside South Shropshire District. The remaining 68.1% of expenditure is leaked to destinations outside the District, including Tenbury Wells (35.3%) and Kidderminster (11.8%).**

**Zone 3 – South Shropshire accounts for 72.7% of top-up expenditure in Zone 3, of which a significant proportion (43.7%) is directed towards Craven Arms.**

**Zone 4 – Church Stretton is the destination which attains the greatest proportion of top-up expenditure in this zone, having a market share of 42.2%. Overall the District retains 46.0% of top-up expenditure in Zone 3, with 54.0% being leaked to destinations outside of South Shropshire.**

**Zone 5 – 38.8% of top-up expenditure is retained in the District, mainly by facilities in Bishop's Castle (19.4%) and Church Stoke (16.4%). Leakage is predominately to destinations in Shrewsbury and Atcham Borough (35.9%) and Powys County (22.3%).**

5.16 Top-up shopping patterns in Zones 1 to 5 as a whole are:

- Bishop's Castle **4.4%;**
- Church Stoke **3.0%;**
- Church Stretton **8.2%;**
- Cleobury Mortimer **6.7%;**
- Craven Arms **6.6%;**
- Ludlow **22.0%;**
- Other, South Shropshire **5.0%;**
- Bridgnorth DC Area **4.0%;**

- Herefordshire Council Area **4.0%;**
- Malvern Hills DC Area **9.5%;**
- Powys County Council Area **5.1%;**
- Shrewsbury & Atcham BC Area **12.8%;**
- Telford and Wrekin BC Area **1.5%;**
- Wyre Forest DC Area **3.7%;**
- Other **3.3%; and**
- Internet/ online **0.2%.**

5.17 The overall pattern of convenience shopping in Zones 1 to 5, combining main and top up shopping is:

- Bishop's Castle **2.1%;**
- Church Stoke **3.9%;**
- Church Stretton **4.7%;**
- Cleobury Mortimer **1.9%;**
- Craven Arms **5.1%;**
- Ludlow **29.7%;**
- Other, South Shropshire **1.2%;**
- Bridgnorth DC Area **1.9%;**
- Herefordshire Council Area **4.6%;**
- Malvern Hills DC Area **6.1%;**
- Powys County Council **5.6%;**
- Shrewsbury & Atcham BC **19.8%;**
- Telford and Wrekin BC Area **1.6%;**
- Wyre Forest DC Area **9.8%;**
- Other **1.5%; and**
- Internet/ online **0.5%.**

5.18 Penetration maps showing the draw of the District and the five town centres in the convenience sector within Zones 1 to 5 is contained at Appendix 9.

*The Role of Convenience stores in the District*

5.19 The following section relates to the turnover of facilities in the District across the Study Area as a whole, which incorporates Zones 1 to 6.

5.20 When assessing the performance and role of convenience stores and defined towns it is important to understand whether or not existing facilities are overtrading or undertrading. If a town or store is overtrading, it means that when the turnover of the floorspace is assessed based on the results of empirical research, and compared to the expected performance of the town based on average sales densities, the floorspace is attracting more expenditure than would be expected. In other words it is trading above the level that would be expected. The implication of this is that there is a need for additional convenience floorspace to redirect some of the expenditure currently attracted to the overtrading town or store. If more convenience floorspace is not provided, then the shopping experience of shoppers using the overtrading town will be reduced, and the market share of the town will start to decline. When a town is undertrading the opposite is true: the town is attracting less expenditure than would be expected, and consequently the town has an oversupply of convenience floorspace meaning that there is a reduced capacity for new floorspace.

5.21 It is apparent from examination of the turnover of centres against their expected turnover (Table 5 at Appendix 8) that some centres within the District are overtrading in the convenience retail sector. However it should be noted that in rural areas, where there are relatively few convenience stores, facilities which are present will tend to trade at higher than average sales densities.

5.22 Facilities in Craven Arms Town Centre as a whole are marginally overtrading by some £0.1m, whilst stores in Cleobury Mortimer are overtrading by a more significant £0.3m. In relation to Craven Arms, our assessment indicates that the Harry Tuffin's store is undertrading by £0.9m whereas other convenience facilities are overtrading by £1.0m. Consequently convenience facilities in Craven Arms overall are trading at £0.1m above their expected level. Convenience stores in both Church Stretton and Bishop's Castle are trading below their expected level, based on average sales densities. With respect to Church Stretton it is evident that whilst the Co-op foodstore at Lion Meadow is trading at some £1.9 more than would be the case at company average sales densities, other convenience facilities in the centre are undertrading by £2.2m. Consequently, convenience facilities in the centre as a whole are undertrading by £0.3m. With regard to Bishop's Castle, convenience facilities in the town centre as a whole are undertrading marginally by £0.1m.

5.23 In Ludlow Town Centre, convenience facilities as a whole are overtrading by some £8.7m. This is primarily due to the Tesco at Station Drive which is trading at £13.7m above company average. Both the Somerfield at Upper Galdeford and other convenience facilities in the town centre are undertrading, by £0.3m and £4.6m respectively.

5.24 The large-format Tesco store at Ludlow plays an important role in meeting the main-convenience shopping needs of some of the Study Area's residents, although there is a significant leakage of spending to destinations outside of the District. Other stores in the town centres and elsewhere in the District play a limited role in main convenience shopping. Stores in the District retain some 44.1% of top-up shopping expenditure in the Study Area (56.0% retention across Zones 1 to 5). This compares to nearly 37.2% of main convenience shopping expenditure (46.7% retention across Zones 1 to 5) being retained within the District.

From the Study Area, there is considerable leakage to Shrewsbury (from the Church Stretton and Rural North area), Kidderminster and Tenbury (from the Cleobury Mortimer area) and Leominster (from the Leominster area). However this situation would be expected given the regional hierarchy of centres.

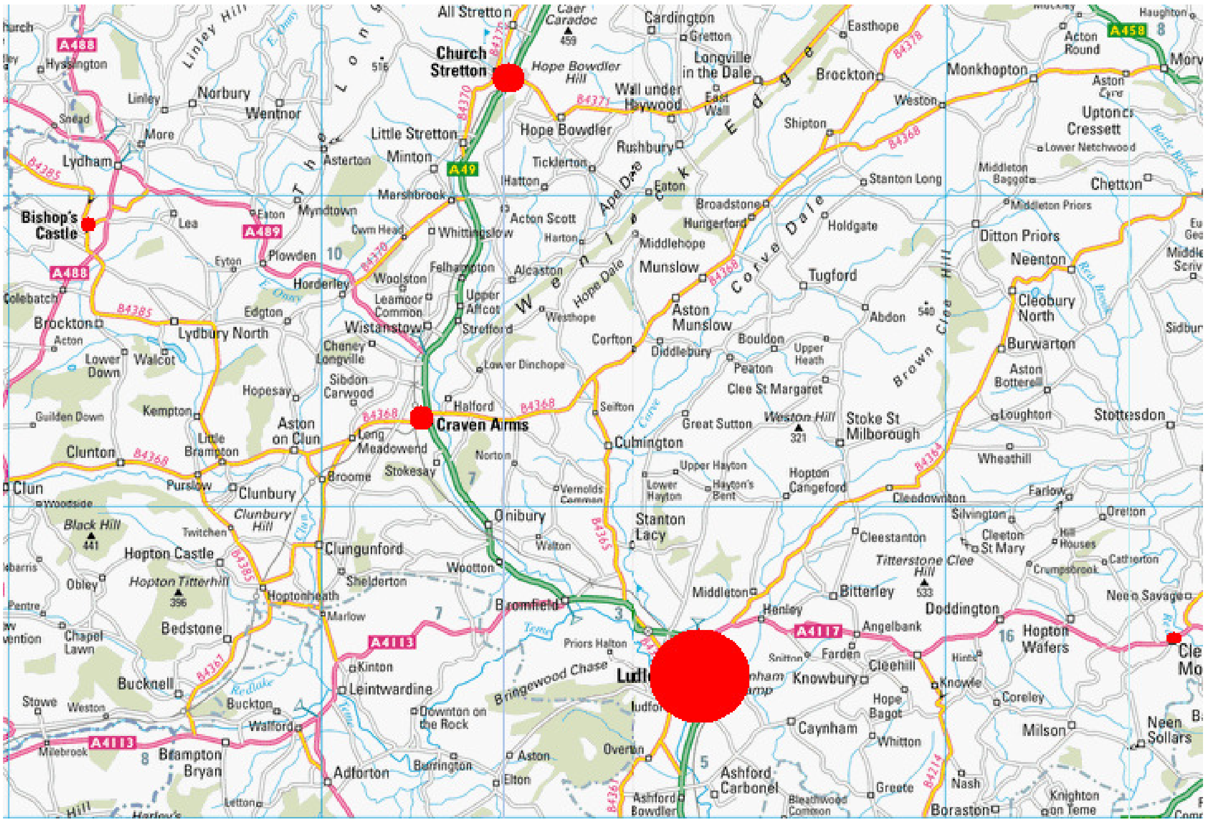
## Retail Hierarchy

5.25 The total turnover of the five town centres in the District is £81.4m (combined convenience and comparison goods). Figure 5.1 summarises the hierarchy, turnover and market share. By comparison, the Bridgnorth District Retail and Leisure Study undertaken by WYG ascertained that the six defined centres in Bridgnorth had a total comparison and convenience turnover of some £84.3m.

**Figure 5.1: Hierarchy and Market Share**

| CENTRE | CONVENIENCE £(m) | COMPARISON £(m) | TOTAL £(m) | MARKET SHARE (%) |
|---|---|---|---|---|
| 1. Ludlow | 36.2 | 23.1 | 59.3 | 13.9 |
| 2. Church Stretton | 5.6 | 3.3 | 8.9 | 2.1 |
| 3. Craven Arms | 6.0 | 1.2 | 7.2 | 1.7 |
| 4. Bishop's Castle | 2.5 | 0.8 | 3.3 | 0.8 |
| 5. Cleobury Mortimer | 2.3 | 0.4 | 2.7 | 0.6 |
| **TOTAL** | **52.6** | **28.8** | **81.4** | **19.1** |

**Figure 5.2: Hierarchy and Market Share**




N.B. Map is for indicative purposes only
Map produced using Multimap
OS Licence Number: 10001840, 2006

5.26 Ludlow is the dominant centre in the District with a greatest convenience and comparison goods turnover which is considerably greater than the other town centres in the District. Ludlow accounts for nearly three-quarters (73%) of the shopping expenditure directed to the town centres. The market share of Ludlow in the Study Area (the expenditure retained within the Study Area only) is: convenience (30.5%); and comparison (84%).

5.27 Church Stretton has the next greatest turnover, realising a market share of some 2.1% (convenience and comparison goods combined). This is followed by: Craven Arms (1.7%); Bishop's Castle (0.8%); and Cleobury Mortimer (0.6%). These centres perform mainly a convenience shopping role, with the convenience turnover of all of these centres being significantly higher than their comparison turnover.

5.28 The majority of comparison goods expenditure generated in the Study Area is directed to destinations outside of South Shropshire District, and to predominately: the Shrewsbury area (23.7%); Hereford (16.4%); Kidderminster (10.0%); Leominster (7.3%); and Telford (3.4%).

# 6 LEISURE IN SOUTH SHROPSHIRE

## Introduction

6.1 As noted above, in accordance with PPS6 it is common for District-wide retail studies to include a quantitative and qualitative assessment of leisure provision and the need for new facilities in the short, medium and long term. Such leisure assessments are undertaken commonly for the commercial leisure sector: cinema; ten-pin bowling; bingo; and health and fitness clubs.

6.2 In rural areas however, there is little merit in undertaking a quantitative assessment of commercial leisure provision.

6.3 There are two reasons for this. Firstly, commercial leisure provision is, in the main, located in larger urban centres and residents of rural areas will travel to use facilities in urban centres. There is not the commercial demand or commercial viability for commercial leisure provision in rural areas and, on this basis, any quantitative assessment would be of no value. Any growth in commercial leisure spending or patronage identified would be directed to these existing destinations and prove only need in locations outside of the Study Area.

6.4 Notwithstanding this, WYG can provide some general statistics on the number of participants required to support some of the leisure facilities not currently in operation within the District. In terms of Cinema facilities Mintel identifies that some 43,384 visits per annum are required to support one cinema screen, according to Mintel (2006). With respect to Bingo facilities 60,000 visits per annum are required to support a large scale bingo club according to 'Business in Sport and Leisure'. For a modern multi-lane bowling facility a catchment population of at least 150,000 persons in order for it to be commercially viable, as reported in 'Business in Sport and Leisure'. Although no data relating to ice-rinks is available, the catchment population required to support such a facility is substantial, with most ice-rinks being located in cities or large towns. As an example, Telford Ice-rink has an annual patronage rate of 254,000 visits. Similarly no data is available concerning the catchment population required to sustain a swimming pool, although given their location in towns and cities, it is evident that a fairly substantial population is required to them to be commercial available. As the population of South Shropshire is identified by the Sustainability Group of Shropshire County Council to be some 42,300 persons at 2005 mid-year estimates (Information Sheet P8/9/SS) clearly such leisure facilities cannot be supported in the District at the current time.

6.5 Secondly, there tends to be a lesser propensity to use commercial leisure facilities amongst residents of rural areas, given the demographics of such areas (the age of the population) and the lack of available provision. Although this could be considered as demonstrative of a latent demand for commercial leisure provision, the methodologies adopted in commercial leisure appraisals account for this latent demand by factoring it in to growth in locations where there is already provision in place. Accordingly, any quantitative assessment would demonstrate only a need for additional provision in Kidderminster, Shrewsbury, Telford and the other higher order centres of the sub-region. Notwithstanding this, although a quantitative assessment of need is not relevant for South Shropshire as this Study adopts a constant market share, it does not necessarily mean that there is not a need for new leisure facilities within the District, rather that any assessment of need should be based on a qualitative assessment

6.6 On the above bases, South Shropshire District Council and WYG agreed to undertake a qualitative assessment of leisure provision and leisure activity in the District and, based upon this assessment, provide advice on the need for qualitative improvements in provision. The assessment is undertaken on a District wide basis, but makes reference to individual centres where it is appropriate and relevant to do so.

**Leisure Uses Considered in the Household Survey**

6.7 The NEMS Household Survey (November 2006) asked questions on a range of leisure activities that WYG considered would be undertaken by residents of the Study Area. The leisure activities considered were: indoor health and fitness activity; dining at restaurants; visiting pubs and bars; and use of hot food take-away facilities.

*Indoor Health and Fitness*

6.8 The largest leisure facility in the District is the South Shropshire Leisure Centre (SSLC) at Bromfield Road in Ludlow, which offers sports and fitness activities for a broad range of interests and age groups. The leisure centre is run by Teme Leisure, a Leisure Trust, which is registered as a ‘Society for the Benefit of the Community’.

6.9 The SSLC facilities are: 25 metre/6 lane pool; diving pool with movable floor; small leisure pool; 65 metre flume; health suite; 6-court sports hall; and 49-station fitness suite. The SSLC is open on weekdays from 7.00am until 10.30pm. At weekends, the centre opens slightly later, at 7.30am, closing at 10.30pm on Saturday and 7.30pm on Sunday.

6.10 Other facilities in the District are: the SpArC Centre at Brampton Road, Bishop’s Castle, which has a swimming pool, squash court, fitness suite and health suite; the Cleobury

Mortimer leisure centre; the Craven Arms Community Centre which incorporates a sports hall; and the Fitness and Nutrition Clinic at The Manor House, Little Stretton.

6.11 The NEMS empirical research identifies that 44.2% of the District's residents undertake indoor sport or health and fitness activity. Of this 44.2%, nearly a quarter (23%) use facilities in Ludlow, with the town's facilities drawing greatest patronage from the Ludlow area itself and from Craven Arms. The other centres in the District perform only a limited role in indoor sport and health and fitness activity. The next most popular destination in the District after Ludlow is Bishop's Castle (4.5%), followed by Church Stretton (1.8%), Craven Arms (0.7%) and Cleobury Mortimer (0.5%). The Council compiles regular usage data for health and fitness activity, and these data should be updated periodically.

6.12 Ludlow is the most popular destination for sport and health and fitness activity amongst its residents. Those who use facilities outside of the District are principally those who live in the Leominster are and use facilities in that town. However, there is a significant draw of people from the Ludlow area to Leominster (10.2%). Shrewsbury attracts 14.3% of residents who undertake health and fitness activity, with the greatest draw (60.5%) from the Church Stretton and Rural North area.

6.13 Few residents of the Study area use facilities on a daily basis (3.4%). The majority use facilities either weekly (30.2%) or two to three times a week (22.5%).

6.14 In terms of Policy advice, the proportion of residents who undertake indoor sport and health and fitness activity is healthy. That being said, the proportion of residents undertaking such activity is below 40% in Cleobury Mortimer and the Rural East, Craven Arms and Church Stretton and the Rural North. The proportion of residents in the Leominster area who undertake health and fitness activity is 56%, which is above considerably the proportion in South Shropshire District. Notwithstanding this it should be highlighted that the empirical work conducted for this Study differs from the results of the Sport England Active People (December 2006) which placed South Shropshire as the lowest rural district in terms of participation in sport and physical activity. In this survey 19.6% of adults participated in least 30 minutes moderate intensity sport and active recreation on three or more days a week against a national average of 20.1%.

6.15 In the District itself, there is clearly comprehensive provision in Ludlow; the Broomfield Road site has a broad range of facilities and is well used. The provision elsewhere in the District is less comprehensive and attention should be focussed upon qualitative improvements to the existing facilities in Bishop's Castle and Cleobury Mortimer and developing new facilities in Church Stretton and Craven Arms.

*Dining Out*

6.16 78.7% of interviews dine out and were able to identify the destination on their most recent visit to a restaurant. Ludlow is the single most popular destination (17.8% residents giving a positive answer), and attracts 63% of diners from the Ludlow area. Other centres in the District attracting restaurant-goers are: Church Stretton (4.2% from the Study Area and 21.2% from the Church Stretton and Rural North area); Bishop's Castle (2.5% from the Study Area and 16.9% from the Bishop's Castle area); and Craven Arms (1.0% from the Study Area and 5.9% from the Craven Arms area). There are no recorded trips to Cleobury Mortimer, which is unexpected and not considered to be representative necessarily of the centre's use for dining out; it is evident from the WYG site visits that the centre does contain a healthy range of public houses and restaurants.

6.17 Outside of the District, dining-out destinations that attract a significant proportion of the Study Area's residents are: Shrewsbury (16.5%); Tenbury Wells (8.5%); Hereford (7.0%); and Leomister (6.6%). Leomister attracts almost exclusively from the Leominster area, and not from South Shropshire District, and 33.3% of dining out trips that are made in the Leominster area. A positive approach to promoting the evening economy in the District is needed if the centres in the District are to compete with higher-order destinations outside of the Council area.

6.18 With regard to frequency of visit, few of the District's residents dine out on a fortnightly (9.5%) or more frequent (10.4%) basis. The majority of residents dine out either at least every six months (18.2%), at least every two months (18.4%) or at least once a month (25.4%).

6.19 In terms of policy advice, the District should look to develop further the role of Ludlow as a destination for dining out. It attracts currently a healthy proportion of visitors from Ludlow itself and from Craven Arms, but few visits from elsewhere in the District. The Council should seek to develop the role of Ludlow as a dining-out destination, to assist with development of the evening economy in accordance with national planning guidance. Elsewhere in the District, it is likely that the smaller centres will continue to play an ancillary role in the evening economy. The District should consider and seek to address the lack of patronage in Cleobury Mortimer.

6.20 In all centres it is important that any strategies to develop further Class A3 uses do not succeed at the expense of Class A1 uses (a full list of Use Classes is contained in this report at **Appendix 10**). The role of the town centres within the District should remain as Class A1 retail centres principally with ancillary Class A2 financial and professional and Class A3, Class A4 and Class A5 uses performing an important but subordinate role. The further development of an evening economy in these centres should be a strategy of the Council, to ensure that the District's residents can make best use of the principal centres.

*Pubs and Bars*

6.21 61.2% of the Study Area's residents visit pubs and bars. The proportion of residents using such facilities varies from a high in Craven Arms (of 66%) to a low in Bishop's Castle (54%). Of the 61.2% who do visit pubs and bars, the destination visited most frequently is within walking distance of home for 42.2% and requires a car journey to be made by a further 42.2%. The propensity to walk to pubs and bars is greatest in Ludlow and least in Church Stretton and the Rural North.

6.22 In respect of frequency of visit, a very limited proportion (0.8%) visit their regular pub or bar on a daily basis. The majority visit their regular pub or bar at least once a fortnight or more frequently (51.5%), with 39.2% visiting this destination at least once a week.

6.23 As might be expected, there is a broad range of facilities visited. However, 14.1% of most frequently visited destinations are in Ludlow. In the Ludlow area itself, the proportion of destinations in the town, which are the most frequently visited destination cited by Ludlow residents, increased to 67.7%. The proportion of Study Area residents citing other centres as being the location of their most frequently visited bar or pub are: Bishop's Castle (4.2%); Church Stretton (3.1%); and Craven Arms (2.8%). There is no mention of Cleobury Mortimer, although we recognise that it does contain a number of public houses.

6.24 Outside of the District, frequently cited destinations are: Tenbury Wells (11.6%); Leomister (8.7%); and Shrewsbury (6.5%). 84% of the Study Area's residents who cite Ludlow are from Ludlow itself.

6.25 The policy advice in respect of pubs and bars mirrors that for restaurants. It is important for the District to develop the five town centres as leisure destinations and the use of the centres in the evening will assist in achieving this. It is clear that Ludlow is an important destination for pub and bar activity. The other smaller centres are cited less frequently and are of a lesser importance in this commercial sector.

6.26 The Council should consider ways to develop the role of these centres, including Cleobury Mortimer, which does not feature in either the empirical analysis of restaurants or pubs and bars. The caveat to this policy development is that, to ensure the continued vitality and viability of centres, it is important to ensure that a proliferation of non Class A1 uses does not undermine a centre's role as a convenience and comparison shopping destination.

*Hot Food Takeaways*

6.27 With regard to hot food takeaways, NEMS asked interviewees first about the proximity to home of their most frequently visited facility and secondly about its specific location. 54.0% of the Study Area's residents use hot food takeaway facilities. The proportion of the resident population using hot food takeaways ranges from 59.0% in Bishop's Castle to 49.0% in Craven Arms.

6.28 In respect of proximity to home, of those who use such facilities 32.4% use a facility that is in walking distance of home, whereas 58.7% have to make a car journey.

6.29 In terms of location, 24.3% of residents cited that their most frequently visited facility is in Ludlow; this increases to 89.7% in the Ludlow zone itself. With regard to the other centres in the District, the proportion of residents citing these towns as being the location of their most frequently visited facility are: Bishop's Castle (6.8%); Craven Arms (6.1%); and Church Stretton (5.3%). In common with other food and drink facilities, there is no mention of Cleobury Mortimer.

6.30 Outside of the District, other destinations cited by a significant proportion of the interviewees are: Tenbury Wells (20.5%); and Leominster (15.9%). Tenbury Wells is recorded as attracting all of the hot food take-away patronage from the Cleobury Mortimer area; in reality this is not the case, but the statistics demonstrate that Cleobury Mortimer is losing patronage to Tenbury Wells. All of the visitors to facilities in Leominster are from the Leominster area itself. Although Cleobury Mortimer does not register in terms of food and drinks facilities, it is evident that the centre contains a healthy range of bars and restaurants which serve an important role in the local community.

6.31 Of all the food and drink facilities, it is hot food takeaways that cause the most consternation amongst traders and residents. It is important that such facilities do not impact adversely upon the character and appearance or vitality and viability of town centres. However, hot food takeaways can add to a vibrant and healthy evening economy and should be encouraged provided that they are not at the expense of Class A1 retail uses. Policy guidance is required to control the proportion of non-retail uses within centres, but there is no justification for a blanket ban; indeed the Study suggests that there is scope for further provision. Specific attention should be paid to developing the evening economy role of the smaller centres in the District and particularly Cleobury Mortimer, which appears very poorly provided for in these sectors.

**Other Leisure Uses**

*Theatre*

6.32 Ludlow Assembly Rooms opened in May 1993 following five years of fund raising and development. It comprises is a 291-seat main auditorium and, in the former museum building adjacent: a function room with a 200-person capacity; and a 'Studio' used for workshops, dance and exhibitions. The vision of the LAR is to be a leading rural arts, entertainment and community centre.  It aims to be renowned for diverse and stimulating programme, friendly atmosphere and accessibility to all.

6.33 The LAR is an arts and community venue offering a range of high quality arts and entertainment events and activities.  There is an emphasis on working in partnership with the local community to promote a cultural experience that broadens knowledge and appreciation of arts in all its forms.

6.34 The LAR should be protected and safeguarded as a venue for arts and entertainment.  The long-term lease granted by SSDC should ensure the continued future use of the site for arts, entertainment and education.

6.35 In addition SpArC (Shropshire Arts and Sport Community Project) is in operation in the District.  This project has led to the provision a quality modern art and sporting facility in Bishop's Castle, with the Sports and Arts centre officially opened in 2006.  This facility provides a new community theatre along with a sports hall, swimming pool and fitness suite, which is used by pupils of the nearby Community College during the day, and is available for use by the local community at other times.  Exhibitions, plays and various cultural events are organised at the SpArC centre.

6.36 There are no other permanent arts and entertainment venues in the District, but it is considered that there is little scope for the development of further facilities outside of Ludlow.  The emphasis should be on preserving and promoting the existing facility in the District's principal town and on maintaining the SpArC centre, but the Council should seek to assist, where possible, other local centres to provide arts and entertainment at least on a temporary basis.  In terms of the LAR, it is important to ensure that complementary facilities are in place, such as restaurants, cafes and bars, to encourage visits to the LAR and use of other facilities in the town centre.  The LAR should be at the forefront of the Council's policies for an active evening economy.

*Cinema*

6.37 A mobile cinema has operated in Shropshire and Herefordshire since 2002 and Ludlow is one of the destinations visited.  'Flicks in the Sticks' ensures that people living in remote areas do not have to travel to higher order centres to enjoy the latest films.  The mobile cinema has in excess of 500 films.  In addition a permanent cinema is located at the Assembly Rooms in Ludlow.  Although it has no regular showings film are normal screened two to three nights per week and comprise a combination of main stream and art cinema.

6.38 There is no prospect of a cinema showing films on a regular basis being developed in Ludlow, so the Council should continue to give its support to the mobile cinema and the

Ludlow Assembly Rooms and encourage other mobile facilities to visit the District and increase accessibility to leisure activity.

*Local Attractions*

6.39 South Shropshire District has a wealth of local attractions, which will draw visitors both from within and outside of the District. A comprehensive list of the tourism activities present in South Shropshire is included at **Appendix 11**.

6.40 It is important that the Council protects these assets which are an attraction to the District and also encourages the five town centres to benefit from visitors to these centres by giving support to associated leisure and recreation facilities within centres, to draw visitors to these centres both in the daytime and during the evening.

## Policy implications

6.41 In light of the above, whilst it is clear that there are an array of leisure facilities present within South Shropshire, the commercial leisure needs of residents are not met and South Shropshire's residents are travelling outside the District for the majority of their leisure activities. Whilst this will always be the case in a rural district, the Council should nevertheless enhance existing facilities wherever possible, and support the provision of further leisure facilities for the use of local communities. This is something that should be taken forward by the Local Planning Authority.

6.42 It is noted that the Council will be running a 'Better Welcome' visitors survey in Church Stretton, Bishop's Castle and Ludlow in the summer of 2007. This will provide more detailed information regarding the leisure sectors in these town centres and will be useful in developing planning policy solutions for the LDF.

# 7 SOUTH SHROPSHIRE RETAIL ASSESSMENT

## Retail Need and Capacity

*Overview*

7.1 The statistical tables at Appendix 8 use the findings of the Household Survey to calculate the need and capacity for new retail floorspace in South Shropshire, in the convenience and comparison sectors, over the periods to 2011, 2016 and 2021. The calculations at Appendix 8 give a short, medium and long term views of need and capacity.

7.2 The Council is preparing currently a Local Development Framework and the retail need and capacity identified over the period to 2011 is of direct relevance to this. The medium term and long term need and capacity are relevant in the context of the future reviews of the Local Development Framework, although it is advisable that the Council update this Study periodically and ideally at least every five years. In the context of development control, PPS6 advises that, in considering applications for retail development, local planning authorities should project need forward no more than five years, except where major town centre development proposals are involved. As set out in Section 2, paragraph 3.10 of PPS6 considers a five year timeframe as being appropriate for considering the 'need' for additional retail floorspace.

7.3 Indicative need and capacity assessments are provided for 2016 and 2021, but should be viewed with some caution. Any identified need or capacity beyond 2011 is not justification for new retail floorspace outside of existing centres, as this could prejudice from coming forward more central sites, that, although not available for retail development at present, may become available between now and 2011 or after 2011.

7.4 The quantitative need for new floorspace is derived from growth in spending power, as a result of year-on-year growth in per capita spending and population growth. The quantitative assessment is on a constant market share basis; i.e. assuming that retail destinations retain their current market shares in the convenience and comparison retail sector. It is assumed that existing comparison retail floorspace within centres will increase its turnover by 1.5% per annum as a result of floorspace efficiencies; a proportionate adjustment is made to the need figures to account for these floorspace efficiencies. No adjustment is made in respect of convenience goods retailing. In assessing the combined qualitative and quantitative need for additional convenience goods floorspace (the capacity), account is taken of the trading performance of existing stores so as to factor in any under or overtrading.

7.5 Growth in expenditure pro-rata to the current market shares of edge-of-centre and out of centre retail facilities is aggregated to the need and capacity identified by centre where appropriate. This is based upon the principle that all new retail floorspace should be accommodated within defined town centres in the first instance. Only after all potential town centre opportunities have been exhausted should less central sites be considered.

7.6 It is important to note that the capacity figures given for 2006 and the periods to 2011, 2016 and 2021 are cumulative not independent. For example if a store is developed in a defined centre over the period to 2011, the capacity at 2016 will be less than quoted in the tables, as the new floorspace created should be deduced from the 2016 capacity for retail floorspace. All retail floorspace given for the medium-term (to 2016) and long-term (to 2021) are indicative only.

7.7 The implication of the identified need for a town centre not being met within that town centre is that the market share of that centre will decline.

7.8 Section 8 considers the availability of premises and sites in the four towns to meet the need and capacity identified for new convenience and comparison retail floorspace.

## South Shropshire

## Ludlow

*Quantitative Retail Need – **Ludlow***

7.9 Table 7.1 sets out the convenience and comparison retail need for Ludlow Town Centre over the periods to 2011, 2016 and 2021. An allowance is made for existing comparison retail floorspace increasing its efficiency by 1.5% per annum. No allowance is made for floorspace efficiencies in existing convenience floorspace.

**TABLE 7.1: QUANTITATIVE NEED – LUDLOW TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE LUDLOW AREA)***

| YEAR | CONVENIENCE | | COMPARISON | |
|---|---|---|---|---|
| | £(m) | Sq. m (net) | £(m) | Sq. m (net) |
| **TURNOVER 2006** | **36.2** | **-** | **23.1** | **-** |
| | | | | |
| **CAPACITY** | | | | |
| AT 2006 | | | | |
| BY 2011 | **2.7** | **270-540** | **3.8** | **760-1,086** |
| BY 2016 | **5.5** | **550-1,100** | **8.8** | **1,760-2,514** |
| BY 2021 | **8.4** | **840-1,680** | **15.1** | **3,020-4,314** |

Average Sales Density Convenience – Assumed to be £5,000/sq. m and £10,000/sq. m
Average Sales Density Comparison – Assumed to be £3,500/ sq. m and £5,000/sq. m
*factors in a 1.5% floorspace efficiency for existing comparison town centre floorspace

*Convenience Goods*

7.10 In the short term, over the period to 2011, there is a need for modest additional town centre retail floorspace in the convenience retail sector. There is a demonstrable need for between

270 sq. m (net), at a sales density of £10,000/sq. m, and 540 sq. m (net), at a sales density of £5,000/sq. m, of additional convenience retail floorspace. The short term need is sufficient to support an extension of existing convenience retail floorspace.

7.11 In the medium term (over the period to 2016), there is a need for between 550 sq. m (net) and 1,100 sq. m (net) of additional convenience retail floorspace, dependent upon the sales density of floorspace that comes forward. The need identified, based upon the likely sales density of retailers delivering that quantum of floorspace, will be sufficient to support a small sized supermarket (of the size occupied typically by discount retailers) or an extension to existing provision.

7.12 In the long-term, over the period to 2021, the need identified will support between 840 sq. m (net), at a sales density of £10,000/sq. m, and 1,680 sq. m (net), at a sales density of £5,000/sq. m, of additional convenience retail floorspace. The long-term need provides the scope for a small to medium sized foodstore.

*Comparison Goods*

7.13 In the short-term, over the period to 2011, there is a need for between 760 sq. m (net) and 1,086 sq. m (net) of additional comparison retail floorspace dependent upon the sales densities adopted. Over the period to 2016 (the medium term) the need will increase to between 1,760 sq. m (net) and 2,514 sq. m (net). The short-term need will provide for a modest extension to existing retail floorspace in the comparison sector. In the medium term, this need will increase to a more substantial addition to comparison retail provision.

7.14 In the long term, the need identified should be viewed as no more than indicative and theoretical. However, it does give some indication of the parameters that the town will be working within over the coming 15 years if the town is to retain its market share in light of increased competition from other higher order centres in the region. The need identified, of between 3,020 sq. m (net) and 4,314 sq. m (net) by 2021, would result in a significant expansion of comparison retail activity in the town.

7.15 It should be noted that these capacity figures are dependent on the sales density of the end operator. For example large-format bulky goods retailers typically trade at lower floorspace densities than those stated above. A development of this type of retail unit would, therefore, allow for a larger increase in comparison retail floorspace than suggested by Table 7.1.

*Qualitative Convenience Retail Capacity –* ***Ludlow***

7.16 Table 7.2 sets out the combined quantitative and qualitative convenience retail capacity for Ludlow immediately and over the periods to 2011, 2016 and 2021. The existing convenience retail floorspace, in Ludlow (due to the Tesco) is overtrading currently by £8.7m. On this basis, there is an immediate capacity for additional floorspace of between 870 sq. m and 1,740 sq. m of retail floorspace. The combined quantitative and qualitative capacity will, by 2011, provide for additional food retail floorspace of between 1,140 sq. m (net) at a sales density of £10,000/sq. m or 2,280 sq. m (net) at a sales density of £5,000 sq. m.

7.17 There is an immediate need for an improvement of the convenience goods offer in Ludlow. Existing convenience goods provision within Ludlow is overtrading and this is due exclusively to the strong trading performance of Tesco which is overtrading by £13.7m (by 90%), whilst the existing Somerfield and other local shops are identified to be undertaking by £4.9m (by 40%). Whilst there is a need capacity brought about by the overtrading of the Tesco store, any new development would also impact up on other convenience retailers in Ludlow which are already undertrading.

7.18 The capacity by 2016 will provide for additional retail floorspace of between 1,420 sq. m (net) at a sales density of £10,000/sq. m and floorspace of 2,840 sq. m (net) at a sales density of £5,000/sq. m. By 2021 there will be capacity of between 1,720 sq. m (net) and 3,440 sq. m (net), dependent upon the sale density adopted and the rate of population growth. This need would be sufficient to support an additional medium-sized foodstore, a supermarket or a number of small convenience stores, depending upon the type of operator that comes forward.

**TABLE 7.2: QUALITATIVE CAPACITY – LUDLOW TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE LUDLOW AREA)***

| YEAR | CONVENIENCE | |
|---|---|---|
| | £(m) | Sq. m (net) |
| **TURNOVER 2006** | **36.2** | **-** |
| | | |
| ***CAPACITY*** | | |
| AT 2006 | **8.7** | **870-1,740** |
| BY 2011 | **11.4** | **1,140-2,280** |
| BY 2016 | **14.2** | **1,420-2,840** |
| BY 2021 | **17.2** | **1,720-3,440** |

Average Sales Density Convenience – Assumed to be £5,000/sq. m and £10,000/sq. m
*factors in a 1.5% floorspace efficiency for existing comparison town centre floorspace

*Commitments – **Ludlow***

7.19 There are currently no commitments for additional convenience or comparison retail floorspace in Ludlow (a full list of retail and leisure permissions is contained in this report at **Appendix 12**).

## Bishop's Castle

*Quantitative Retail Need – **Bishop's Castle***

7.20 Table 7.3 sets out the convenience and comparison retail need for Bishop's Castle Town Centre over the periods to 2011, 2016 and 2021. An allowance is made for existing comparison retail floorspace increasing its efficiency by 1.5% per annum. No allowance is made for floorspace efficiencies in existing convenience floorspace.

**TABLE 7.3: QUANTITATIVE NEED – BISHOP'S CASTLE TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE BISHOP'S CASTLE AREA)***

| YEAR | CONVENIENCE | | COMPARISON | |
|---|---|---|---|---|
| | £(m) | Sq. m (net) | £(m) | Sq. m (net) |
| **TURNOVER 2006** | **2.5** | **-** | **0.8** | **-** |
| | | | | |
| **CAPACITY** | | | | |
| AT 2006 | | | | |
| BY 2011 | **0.2** | **20-40** | **0.1** | **20-29** |
| BY 2016 | **0.4** | **40-80** | **0.3** | **60-86** |
| BY 2021 | **0.6** | **60-120** | **0.5** | **100-143** |

Average Sales Density Convenience – Assumed to be £5,000/sq. m and £10,000/sq. m
Average Sales Density Comparison – Assumed to be £3,500/ sq. m and £5,000/sq. m
*factors in a 1.5% floorspace efficiency for existing comparison town centre floorspace

*Convenience Goods*

7.21 There is a need, over the period to 2021, for a minimal increase in convenience goods floorspace of up to 120 sq. m (net). In the long term this would provide scope for extensions to existing floorspace only.

*Comparison Goods*

7.22 In the long term (to 2021) there is capacity is for up to 143 sq. m (net) of comparison floorspace, which would support a small new store or extension to existing provision.

*Qualitative Retail Capacity – **Bishop's Castle***

7.23 The quantitative need identified for convenience retail floorspace decreases however when the current trading position of existing convenience facilities in the town centre is considered. Table 7.4 demonstrates that there is currently an over-provision of convenience floorspace due to the undertrading of existing convenience stores. In the short-term (to 2011) there is capacity for up to 20 sq m (net) of additional convenience floorspace which rises to 100 sq. m (net) by 2021. This quantum of floorspace could be satisfied by an extension to the floorspace of an existing unit.

**TABLE 7.4: QUALITATIVE CAPACITY – BISHOP'S CASTLE TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE BISHOP'S CASTLE AREA)***

| YEAR | CONVENIENCE | |
|---|---|---|
| | £(m) | Sq. m (net) |
| **TURNOVER 2006** | **2.5** | **-** |
| | | |
| **CAPACITY** | | |
| AT 2006 | **-** | **-** |
| BY 2011 | **0.1** | **10-20** |
| BY 2016 | **0.3** | **30-60** |
| BY 2021 | **0.5** | **50-100** |

Average Sales Density Convenience – Assumed to be £5,000/sq. m and £10,000/sq. m
*factors in a 1.5% floorspace efficiency for existing comparison town centre floorspace

*Commitments – **Bishop's Castle***

7.24 There are currently no commitments for additional convenience or comparison retail floorspace in Bishop's Castle.

## Church Stretton

*Quantitative Retail Need – **Church Stretton***

7.25 Table 7.5 sets out the convenience and comparison retail need for Church Stretton Town Centre over the periods to 2011, 2016 and 2021. An allowance is made for existing comparison retail floorspace increasing its efficiency by 1.5% per annum. No allowance is made for floorspace efficiencies in existing convenience floorspace.

**TABLE 7.5: QUANTITATIVE NEED – CHURCH STRETTON TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE CHURCH STRETTON AREA)***

| YEAR | CONVENIENCE | | COMPARISON | |
|---|---|---|---|---|
| | £(m) | Sq. m (net) | £(m) | Sq. m (net) |
| **TURNOVER 2006** | **5.6** | **-** | **3.3** | **-** |
| | | | | |
| **CAPACITY** | | | | |
| AT 2006 | | | | |
| BY 2011 | **0.4** | **40-80** | **0.6** | **120-171** |
| BY 2016 | **0.9** | **90-180** | **1.3** | **260-371** |
| BY 2021 | **1.3** | **130-260** | **2.2** | **440-629** |

Average Sales Density Convenience – Assumed to be £5,000/sq. m and £10,000/sq. m
Average Sales Density Comparison – Assumed to be £3,500/ sq. m and £5,000/sq. m
*factors in a 1.5% floorspace efficiency for existing comparison town centre floorspace

*Convenience Goods*

7.26 There is limited need for additional convenience goods floorspace in the town in the short to medium term. The need identified over the period to 2016 is sufficient only to support a modest extension to existing provision of up to 180 sq. m (net) of additional floorspace. In the long to 2021 the capacity increases to 260 sq. m (net) of additional convenience floorspace.

*Comparison Goods*

7.27 There is capacity for between 120 sq. m (net) and 171 sq. m (net) in the short term, between 260 sq. m (net) and 371 sq. m (net) in the medium term, and between 440 sq. m (net) and 629 sq. m (net) in the long term. The short term capacity will provide for only a modest extension to existing floorspace. The medium and long term capacity will provide for new shop units and a more meaningful extension to the existing retail offer.

*Qualitative Retail Capacity – **Church Stretton***

7.28 As convenience facilities are currently under-trading when compared with the expected level at average sales densities, there is no immediate capacity for additional convenience floorspace in the centre. However, by 2011 the capacity for new convenience floorspace increases to between 20 sq m (net) and 40 sq m (net) based on current market share. By 2016, there is scope for up to 120 sq. m (net) of convenience floorspace, which would be sufficient to support an extension to the floorspace of existing provision. Over the long term to 2021, capacity for convenience shopping increase to up to 220 sq. m (net) if a sales density of 5,000 sq. m is adopted.

**TABLE 7.6: QUALITATIVE CAPACITY – CHURCH STRETTON TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE CHURCH STRETTON AREA)***

| YEAR | CONVENIENCE | |
|---|---|---|
| | £(m) | Sq. m (net) |
| **TURNOVER 2006** | **5.6** | **-** |
| | | |
| **CAPACITY** | | |
| AT 2006 | **-** | **-** |
| BY 2011 | **0.2** | **20-40** |
| BY 2016 | **0.6** | **60-120** |
| BY 2021 | **1.1** | **110-220** |

Average Sales Density Convenience – Assumed to be £5,000/sq. m and £10,000/sq. m
*factors in a 1.5% floorspace efficiency for existing comparison town centre floorspace

*Commitments – **Church Stretton***

7.29 There are currently no commitments for additional convenience or comparison retail floorspace in Church Stretton.

## Cleobury Mortimer

*Quantitative Retail Need – **Cleobury Mortimer***

7.30 Table 7.7 sets out the convenience and comparison retail need for Cleobury Mortimer Town Centre over the periods to 2011, 2016 and 2021. An allowance is made for existing comparison retail floorspace increasing its efficiency by 1.5% per annum. No allowance is made for floorspace efficiencies in existing convenience floorspace.

**TABLE 7.7: QUANTITATIVE NEED – CLEOBURY MORTIMER TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE CLEOBURY MORTIMER AREA)***

| YEAR | CONVENIENCE | | COMPARISON | |
|---|---|---|---|---|
| | £(m) | Sq. m (net) | £(m) | Sq. m (net) |
| **TURNOVER 2006** | **2.3** | **-** | **0.4** | **-** |
| | | | | |
| **CAPACITY** | | | | |
| AT 2006 | | | | |
| BY 2011 | **0.1** | **10-20** | **0.1** | **20-29** |
| BY 2016 | **0.3** | **30-60** | **0.1** | **20-29** |
| BY 2021 | **0.5** | **50-100** | **0.2** | **40-57** |

Average Sales Density Convenience – Assumed to be £5,000/sq. m and £10,000/sq. m
Average Sales Density Comparison – Assumed to be £3,500/ sq. m and £5,000/sq. m
*factors in a 1.5% floorspace efficiency for existing comparison town centre floorspace

*Convenience Goods*

7.31 There is limited scope for additional convenience floorspace over the period to 2021. There is a need between 50 sq. m (net) and 100 sq. m (net), which could be met by a modest extension in existing floorspace by an existing convenience goods outlet.

*Comparison Goods*

7.32 The need identified for additional comparison goods floorspace is similarly limited. In the long term, the comparison floorspace need identified is just 57 sq. m (net) based on the lower sales density.

*Qualitative Retail Capacity –* ***Cleobury Mortimer***

7.33 The existing convenience retail floorspace in Cleobury Mortimer is overtrading by £0.3m. This serves to increase the capacity for new convenience floorspace, albeit by a relatively small amount. Taking into consideration the performance of current convenience facilities, the capacity for additional convenience floorspace over the period to 2021 increases to between 80 sq. m (net) and 160 sq. m (net). This capacity too could be satisfied by either an extension to an existing convenience store or a small convenience store.

**TABLE 7.8: QUALITATIVE CAPACITY – CLEOBURY MORTIMER TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE CLEOBURY MORTIMER AREA)***

| YEAR | CONVENIENCE | |
|---|---|---|
| | £(m) | Sq. m (net) |
| **TURNOVER 2006** | **2.3** | **-** |
| | | |
| **CAPACITY** | | |
| AT 2006 | **0.3** | **30-60** |
| BY 2011 | **0.5** | **50-100** |
| BY 2016 | **0.6** | **60-120** |
| BY 2021 | **0.8** | **80-160** |

Average Sales Density Convenience – Assumed to be £5,000/sq. m and £10,000/sq. m
*factors in a 1.5% floorspace efficiency for existing comparison town centre floorspace

*Commitments – **Cleobury Mortimer***

7.34 There are currently no commitments for additional convenience or comparison retail floorspace in Cleobury Mortimer.

## Craven Arms

*Quantitative Retail Need – **Craven Arms***

7.35 Table 7.9 sets out the convenience and comparison retail need for Craven Arms Town Centre over the periods to 2011, 2016 and 2021. An allowance is made for existing comparison retail floorspace increasing its efficiency by 1.5% per annum. No allowance is made for floorspace efficiencies in existing convenience floorspace.

**TABLE 7.9: QUANTITATIVE NEED – CRAVEN ARMS TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE CRAVEN ARMS AREA)***

| YEAR | CONVENIENCE | | COMPARISON | |
|---|---|---|---|---|
| | £(m) | Sq. m (net) | £(m) | Sq. m (net) |
| **TURNOVER 2006** | **6.0** | **-** | **1.2** | **-** |
| | | | | |
| **CAPACITY** | | | | |
| AT 2006 | | | | |
| BY 2011 | **0.5** | **50-100** | **0.2** | **40-57** |
| BY 2016 | **0.9** | **90-180** | **0.4** | **80-114** |
| BY 2021 | **1.4** | **140-280** | **0.8** | **160-229** |

Average Sales Density Convenience – Assumed to be £5,000/sq. m and £10,000/sq. m
Average Sales Density Comparison – Assumed to be £3,500/ sq. m and £5,000/sq. m
*factors in a 1.5% floorspace efficiency for existing comparison town centre floorspace

*Convenience Goods*

7.36 Table 7.9 identifies limited need for additional convenience retail floorspace in Craven Arms. The need for convenience goods floorspace up to 2021 is between 140 sq. m (net) and 280 sq. m (net) which would allow a small scale extension to an existing unit or a small freestanding unit.

*Comparison Goods*

7.37 There is similarly limited need for additional comparison retail floorspace. The need identified over the period to 2016, of up to 114 sq. m (net) would support one small format shop unit. By 2021 the need for new floorspace increases to up to 229 sq. m (net) which could potentially support two small comparison units.

*Qualitative Retail Capacity – **Craven Arms***

7.38 The existing convenience retail floorspace in Craven Arms is overtrading marginally by £0.1m. Consequently, there an immediate capacity for up to 20 sq m (net) of additional convenience floorspace. In the period to 2011 the capacity increases to up to 100 sq. m (net) of floorspace and by 2016 it increases to up to 200 sq. m (net) of floorspace. By 2021, capacity increases to up to 300 sq. m (net) of floorspace. This capacity could be accommodated by an extension to the floorspace of existing provision, or a small sized convenience store.

**TABLE 7.10: QUALITATIVE CAPACITY – CRAVEN ARMS TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE CRAVEN ARMS AREA)***

| YEAR | CONVENIENCE | |
|---|---|---|
| | £(m) | Sq. m (net) |
| **TURNOVER 2006** | **6.0** | **-** |
| | | |
| **CAPACITY** | | |
| AT 2006 | **0.1** | **10-20** |
| BY 2011 | **0.5** | **50-100** |
| BY 2016 | **1.0** | **100-200** |
| BY 2021 | **1.5** | **150-300** |

Average Sales Density Convenience – Assumed to be £5,000/sq. m and £10,000/sq. m
*factors in a 1.5% floorspace efficiency for existing comparison town centre floorspace

*Commitments – **Craven Arms***

7.39 There are currently no commitments for additional convenience or comparison retail floorspace in Craven Arms.

# 8 ASSESSMENT OF POTENTIAL DEVELOPMENT SITES

## Introduction

8.1 As part of the commission, and in line with the guidance contained in PPS6 (paragraph 2.45), WYG has undertaken an assessment of potential sites in all of the five town centres on which to accommodate the need and capacity identified in Section 7 of this Study.

8.2 The criteria on which sites have been assessed by WYG is based on the factors which should be taken into consideration when applying the sequential approach. Paragraph 2.44 of PPS6 states that a sequential approach should be applied in selecting appropriate sites for allocation within centres where the identified need is to be met. All options in the centre (including, where necessary, the extensions of the centre) should be thoroughly assessed before less central sites are considered for development for main town centre uses. The sequential approach requires that locations are considered in the following order:

- **'first, locations in appropriate existing centres where suitable sites or buildings for conversion are, or are likely to become, available within the development plan documents period, taking account of an appropriate scale of development in relation to the role and function of the centre; and then**
- **edge-of-centre locations, with preference given to sites that are or will be well-connected to the centre; and then**
- **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 close to the centre and have a high likelihood of forming links with the centre.'**

8.3 Paragraph 2.45 indicates that it is the responsibility of local planning authorities to identify a range of appropriate sites to allow for the accommodation of the identified retail need. These sites may already be available, or are likely to become available over the period of the plan. This should be done through consultation with stakeholders, including developers, and the local community. Flexibility and realism are required when identifying sites for potential future retail development, and sites should be identified which are capable of accommodating a range of business models, in terms of scale, format, car parking provision and scope for disaggregation. Furthermore paragraph 2.45 stipulates that development plan documents should contain policies and proposals for phasing the release of sites over the plan period. This will to ensure that centrally located sites are developed are developed before less central locations.

8.4 Paragraph 3.19 of PPS6 related to consideration of planning applications submitted. However the principal tests of availability, suitability and viability are applicable equally to the consideration of sites for inclusion in the Development Plan Document. Sites must be:

- Available: available now or likely to become available for development within a reasonable period of time (five years is an appropriate timeframe to adopt).
- Suitable: the sites are suitable to meet the need or capacity identified; and
- Viable: the development would be viable on the site identified.

8.5 The following section assesses the potential of the five town centres to accommodate the need and capacity identified. In addition, it identifies sites which could accommodate further retail expansion over and above the capacity identified above should the market share of the centres increase.

8.6 A full list of the sites assessed and the proforma used in this assessment is contained at **Appendix 13**, which also contains a map illustrating the extent and location of each of the sites.

## Ludlow Town Centre

8.7 Table 7.1 above identified capacity for between 760 sq m (net) and 1,086 sq m (net) of additional comparison floorspace by 2011, whilst Table 7.2 demonstrated a need for between 1,140 sq m (net) and 2,280 sq m (net) of convenience floorspace by 2011 once the overtrading of existing stores is taken into account.

8.8 Based on the information provided by GOAD (and updated by WYG) it is apparent that at the time of the Study Ludlow Town Centre contained 10 vacant retail units who occupied some 1,626 sq m of retail floorspace; this could accommodate some of the identified need. There remains a requirement to identify an area or areas to accommodate a more substantial increase in floorspace. Furthermore if Ludlow were to increase its market share, then the capacity for new retail floorspace would increase. In accordance within PPS6, the sequential approach to site selection is applied when considering sites.

8.9 Our assessment (contained at Appendix 13) considers six sites capable of accommodating the identified need over the period to 2011, and accommodating any potential increase in the requirement for new retail floorspace.

**Site 1: Upper Galdeford/ Station Drive Car Park site**

8.10 The Upper Galdeford/ Station Drive Car Park (Figure 8.1) is situated within the town centre and comprises a Council run surface-level facility located adjacent to the Library and to the rear of retail premises on Corve Street. It is bounded to the west by retail units and the Library and to the south by retail units, whilst to the east Station Drive and a railway line form the boundary. To the north are a number of residential units and a Tesco supermarket is situated beyond these. The site covers an area of approximately 0.8 hectares. A small portion of the northerly part of the site is vacant.

Figure 8.1: Ludlow Site 2

8.11 The site in its entirety was assessed at the time of a Tesco application in 1995. This revealed that a previous planning application for a retail supermarket and associated car parking and servicing area was refused in 1985 due to:

- The site being in a prominent location, divorced from the town centre and the negative effect it would have on the visual amenity of the area;
- The roof in particular would detract form the amenity of the area; and
- The marked difference in levels on the site would result in unsafe and unsatisfactory access to the store.

8.12 The site is subject to a protective covenant. Although some of this has now expired, there is a perpetual requirement for at least 50 spaces to be retained for the uses of the Gateway store as was (now the Somerfield store); a factor which will need to be taken into consideration when assessing the development potential of the site.

8.13 With regard to the PPS6 assessment of sequential sites, our assessment indicates that:

- **Availability:** The site has just one owner (the Council) making the redevelopment more straightforward but there is no indication that the car park is available for, or that the Council is considering, redevelopment. The loss of parking facilities that would result from a retail development on the site would more than likely be opposed by local residents as parking spaces are already at a premium in the town (as indicated through the WYG business survey and the park and ride schemes that are in operation). Replacement parking would have to be found if this site was brought forward for future retail development otherwise the vitality and viability of the town centre could be adversely affected;
- **Suitability:** The site is located within the defined Shopping Development area of Ludlow Town Centre, although it is protected by Policy S20 of the Local Plan which seeks to maintain car parking facilities in the town. Varying levels of across site would present complications in any redevelopment proposal. The site is within easy reach of the town centre on foot and close to public transport facilities, with satisfactory access to the site from approach roads; and
- **Viability:** The site is not visible from approach roads and is not located on a street frontage, and would therefore be unlikely to be attractive to commercial operators.

Furthermore the composition of the site does not make it suitable to modern retailing. As the site adjacent to the Ludlow Conservation Area the design of any development would have to preserve or enhance the appearance of the Conservation Area.

8.14 As a result of the above considerations it is considered unlikely that this will come forward for future retail development within a reasonable timescale.

**Site 2: Land at Corve Street/Station Drive (Lloyds of Ludlow)**

8.15 The Council produced in January 2007 a Development Brief for the edge-of-centre Lloyds site. The site extends to approximately 1.7 ha and is irregularly shaped. The site has a long-established history as a haulage yard, is currently occupied by a number of maintenance and storage buildings and is also used as a coal yard. The current mix of employment uses includes an agricultural distributor and a haulage depot. Part of the site is a former railway goods yard.

8.16 The eastern boundary of the site is a railway line. To the north and west, the site is bounded by residential and commercial uses. South Shropshire District Council offices are situated to the west of the site. To the south of the site are Station Drive and a Tesco supermarket.

8.17 The site is within a conservation area and, adjoining the railway, is a gateway site. The Development Brief states that consultation on any scheme submitted will need to be carried out with CABE and English Heritage. In line with Development Plan Policy S3, the Development Brief states that future proposals will be required to retain employment uses, but that redevelopment could include retail, office, residential, hotel and community uses; the mix of uses should be integrated and employment uses should predominate. The coal yard would need to be relocated the footpath network improved.

8.18 The Development Brief comments that the site may require remediation measures to be put into place, given its previous uses and the potential for contamination.

8.19 The site has a history of planning applications for retail development. The Council refused in 1985 to grant outline planning permission for a retail foodstore and ancillary warehousing on grounds of:

- The site being outside the central shopping area and therefore contrary to policy;
- No need was demonstrate for additional retail floorspace within the town at the time of the application;
- The proposal would have led to obstruction of the free flow of traffic on the adjacent country road as a result of vehicles entering and leaving the site; and

- The forward visibility for entering the site from the north-west along Station Drive is would be inadequate from a safety perspective.

8.20 An outline planning application for a supermarket was refused in 1995 on the grounds of:

- The site lies outside the defined Ludlow shopping area;
- The development would cause serious harm to the trading vitality and viability of the town centre;
- Part of the site falls within the Ludlow Conservation Area and insufficient evidence was presented detailing how this issue would be dealt with; and
- The planning application contained a lack of detail regarding vehicular and pedestrian access, traffic generation, parking provision, delivery arrangements, drainage and archaeology.

8.21 In terms of the three criteria for considering sites as stipulated in PPS6, our assessment indicates the following:


Figure 8.2: Part of the Lloyds site

- **Availability**: Whilst the site is in use at the current time for low-level haulage and storage purposes and it could be considered under-used (Figure 8.2) and there may be scope to relocate the current occupiers to a new location. At the time of the Tesco application in 1995, the site had just one owner;
- **Suitability**: Although it is irregular in shape, the site is large enough to accommodate a substantial increase in retail floorspace. It is located close to the town centre although outside the defined Shopping Development area. It is currently protected for employment use under Policies S2 and S3 of the Local Plan, whilst Policy AC4 also applies which states that rail access to employment sites must be maintained. The site has two potential access points off Station Drive and Corve Street, although as highlighted in the refusal of the 1985 application the potential impact on traffic would have to be mitigated. Notwithstanding this, access is good being located within relatively easy walking distance of the town centre and adjacent to the train station. The site is located adjacent an existing large format convenience store (Tesco); and
- **Viability**: The site is not immediately visible from approach roads and would not be located on street frontage. As the entire site lies within or adjacent to the Ludlow Conservation Area, the quality of design and materials would have to be high, showing sensitivity to this designation.

8.22 In summary the site is easily capable of accommodating the need identified to 2011 and beyond, although there are a number of detailed considerations to have regard to comprising design, vehicular access and appropriateness of location with regard to choice for the residents of Ludlow. The site is currently allocated for employment uses in the adopted Local Plan and from discussions within the Council it is apparent that this is unlikely to be considered for de-allocation in the near future. It is unlikely that the site will be available for retail development.

**Site 3 Gravel Hill/Lower Galdeford (1) and Site 4: Gravel Hill/Lower Galdeford (2)**

8.23 The two Gravel Hill/Lower Galdeford sites were assessed separately during site appraisals (contained at Appendix 13) but are considered collectively here given that the sites adjoin each other. The sites are in an edge-of-centre location approximately 120 metres from the Shopping Development boundary, and comprise some 1.7 hectares of land (Site 3 is approximately 1.3 hectares and Site 4 is approximately 0.4 hectares).

Figure 8.3: Honda employment site

8.24 The majority of the site (1.1 hectares) is in use for employment activities including Morris Bufton/ Honda Equipe (an agricultural machinery repair business), which is shown in Figure 8.3. The remainder of the site (0.6 hectares) comprises a South Shropshire Glass warehouse unit, a BT exchange facility and vacant land.

8.25 The site is bounded to the north by a railway line. To the east and west are residential units, whilst to the south Lower Galdeford bounds the site, with a car park, community centre and police station opposite.

8.26 Policy S21 of the Local Plan seeks to guide the redevelopment of Site 3 and states that proposals for the comprehensive redevelopment of the area including employment uses will be permitted. In line with Policy S3 of the Development Plan any proposals for redevelopment of the site will be required to retain an employment use on the site, and this should form the predominant use.

8.27 The Council published a Development Brief for the site in 2003 and updated this in 2005. The Overall Vision of the Development Brief states that the underlying principles for redevelopment of the site include establishing a mix of uses and facilitate comprehensive redevelopment. It is envisaged that part of the site will be developed for housing and other complementary uses could be office, business and retail which should form an integral part of any development and be located on the Gravel Hill, Upper Galdeford frontage. The Development Brief is clear that piecemeal development of the site will not be permitted. Development should be to a high standard of design, respecting the character and appearance of the town centre and the nearby conservation area.

8.28 With regard to the PPS6 tests for considering sites, it is concluded that:

- **Availability:** The sites are in multiple ownerships and in use for a variety of employment activities; the Honda Equipe site appears to have benefited from recent investment. The sites may come forward for redevelopment, but achieving comprehensive redevelopment in accordance with the Development Brief for the site will require some complex land assembly and it may be some time before a comprehensive redevelopment scheme is brought forward;
- **Suitability:** The sites are located away from the defined town centre Shopping Development Area, although are within an edge of centre location and are within easy walking distance of the central area. The sites are accessible from both Lower Galdeford Road and Upper Galdeford Road and are proximate to Lower Galdeford Car Park. The site is easily large enough to accommodate the type of retail floorspace needed in Ludlow over the next five years, although to remain in accordance with the Development Plan and the Development Brief any comprehensive redevelopment scheme that includes retail development, should do so as part of a mix of uses. The Conservation Area runs close to the east part of the site which would require any development to preserve or enhance the character of the Conservation Area; and
- **Viability:** Retail floorspace on the site would be in a highly prominent location and would be visible from Lower Galdeford, Weeping Cross Land and Sheet Road, and there is good inter-visibility between the site and the edge of the Shopping Development Area.

8.29 Whilst this site would be capable of accommodating the scale of need identified to 2011, it is in multiple ownerships and land assembly may take some time if comprehensive redevelopment of the site is to be achieved. It is unlikely to meet all of the retail need identified, but will meet some of that capacity as part of a mixed-use development.

**Site 5: Weeping Cross Lane**

8.30 This out-of-centre site (circa 360 m from the town centre) forms part of a larger site that is available potentially for development. Parts of the site have been development recently for residential use and a community centre; the site assessed here comprises a lesser area of some 1.0 hectare. This site is situated off Weeping Cross Lane and the majority of the site is allocated for employment uses

Figure 8.4: Vacant part of Site 5

under Policies S2, S3 and S8 of the Local Plan. A small part of the site is vacant (Figure 8.4). The site is bounded to the north by a community centre, fire station and ATC centre, to the west by a primary school, to the south by residential uses and to the east by Weeping Cross Lane and the McConnel site (Site 6).

8.31 With regard to the PPS6 assessment of sequential sites, our assessment indicates that:

- **Availability:** As highlighted above some of this land currently lies vacant, whilst it is evident that some of the land allocated for employment uses is currently being marketed and does not appear to be in active use at the current time. The site is likely to be in multiple ownerships;
- **Suitability:** The site is located at some distance from the town centre and accessibility by public transport is restricted. Access by private car is easily achieved off Weeping Cross Lane, whilst it is possible for improved pedestrian access to be provided though to Lower Galdeford Road. The site is adjacent to Lower Galdeford Car Park. The site is on two levels, and would only accommodate a proportion of the need identified; and
- **Viability:** The site occupies frontage on Weeping Cross Lane but is not located in a traditional retail area and is some distance from the town centre. The site is within easy reach of the Ludlow by-pass.

8.32 Whilst the site could accommodate a medium-sized foodstore or some comparison retail floorspace, its redevelopment for retail uses would be contrary to development plan policy and is an out-of-centre site away from the town centre. The site is not likely to come forward and be appropriate for retail redevelopment.

**Site 6: McConnel site**


Figure 8.5: McConnel

8.33 This out of centre site is the largest of the sites assessed totalling approximately 3.1 hectares. It is situated some 420 metres from the town centre. It is located to the south east of the town centre on Weeping Cross Lane, opposite Site 5, and is allocated for employment uses under Policies S2, S3 and S8 of the Local Plan. Currently the site is in use by McConnel (Figure 8.5) and constitutes a large warehouse type unit used for the construction of agricultural machinery. The site is bounded to the north and east by residential uses in the main, to the west by Weeping Cross Lane and a combination of residential uses, car parking, employment land and a fire station, whilst to the south is an undeveloped Conservation Area and Site of Special Scientific Interest.

8.34 With regard to the PPS6 assessment of sequential sites, our assessment indicates that:

- **Availability:** The site is in use as an agricultural machinery factory and this is in active use. The site is in one ownership;
- **Suitability:** The site is located some distance from the Shopping Development Area of the town centre. However, pedestrian access to the surrounding residential area could be provided, and the site is easily accessible by private car. The site provides ample space for delivery, servicing and car parks, and could easily satisfy all the need identified in the District to 2021 in both the convenience and comparison sectors. The site itself is situated at a lower level than the surrounding land and this would help to mitigate any potential visual issues of a new retail development in this locality; and
- **Viability:** The site is relatively flat would cause no undue construction costs. Any retail development would be well visible from Weeping Cross Lane and would occupy street frontage. The site is very large, but could be subdivided for retail use.

8.35 This site could accommodate easily the retail need identified to 2021 and beyond based on current market share, but is currently in use and protected for employment purposes. The Council is keen to maintain the site in employment use and the site shows no signs of becoming available in the near future. On this basis, it is considered that the site is unlikely to come forward and be acceptable for retail redevelopment.

**Site 7: Former Castle Street Garage, Corve Street, Ludlow**

8.36 This site is situated immediately adjacent to the defined Shopping Development Area on Corve Street. It is some 0.31 hectares and is currently vacant having been in use previously as a petrol filling station and repairs garage. The site is bounded by Corve Street to the east and is directly opposite a Tesco foodstore. To the south are premises in retail use, to the north are office and residential uses, whilst to the west are residential units.

8.37 Policy S3 of the site states that the site should remain in employment use. The Council published a revised Development Brief for the site in September 2005. The Development Brief states that the Council is seeking a mixed-use redevelopment of site, with employment uses predominating but residential, office, business and retail uses also being considered appropriate as part of this mix; the mix of uses on the site should be appropriate to its town centre location and any office, business and retail uses should form a an integral part of any scheme and should be located on the Corve Street frontage of any scheme. The Development Brief considers that the main constraints to the redevelopment of the site are likely to be provision of a satisfactory access servicing all of the site and possible contamination of the land (given its former use).

8.38 With regard to the PPS6 test of availability, suitability and viability, our assessment indicates:

Figure 8.6: Former Castle Street Garage

- **Availability:** The site is available immediately and the site is cleared. The Development Brief produced by the Council indicates that the site is in owned by Ludlow Properties Ltd and Castle Garage and the timing of the site coming forward for redevelopment is in the control of these owning parties. The site is not available necessarily for retail development in its entirety, as both the Development Plan and a Development Brief for the site specify that redevelopment should be for a mix of uses and that employment use should predominate.
- **Suitability:** The site is located adjacent to the Shopping Development Area so would form a natural extension to the town centre. The site is flat, suggesting that site levels will not be restrictive in its redevelopment. The site is easily accessible by a variety of means of transport, and has pedestrian access to Corve Street and Linney; and
- **Viability:** The site occupies frontage on Corve Street, would be highly visible and would be viable for commercial retail use; the location would be attractive to developers and retailers alike. The Development Brief indicates that the site may be contaminated and such issues would have to be resolved.

8.39 This site could meet some of the retail need over the period to 2021. It is available and well located in relation to the existing Shopping Development Area; it is located adjacent to existing retail operations including Tesco. As such it is likely to come forward for redevelopment, subject to the remediation of any contamination. Redevelopment for retail use exclusively would represent a departure from the Local Plan.

8.40 The Council should consider whether is remains appropriate to required an employment development led mixed-use development or whether the site could be released for alternative development such as retail.

**Site 8: Castle Street Car Park**

8.41 The Castle Street Car Park is a Council owned facility located to the north of retail units on Castle Street and adjacent to the Shopping Development Area. The site is 0.38 hectares and is located next to retail and residential uses.

Figure 8.7: Castle Street Car Park

8.42 With regard to the PPS6 test of availability, suitability and viability, our assessment indicates:

- **Availability:** The site is all in the ownership of the Council and the car park is well used. WYG expects that redevelopment of the site would be unpopular with local traders and shoppers. Any loss of parking would have to be offset by new parking facilities elsewhere in the town centre, or the vitality and viability of Ludlow would be affected adversely;
- **Suitability:** The site is situated adjacent to the Shopping Development Area. It is accessible on foot and by a choice of modes of transport and could accommodate a considerable new retail floorspace. The site is sloping in nature although this is unlikely to affect its suitability for redevelopment adversely. The site may present difficulties from the perspective of servicing retail units by HGVs; and
- **Viability:** As the site is located behind existing retail units and not visible from any approach roads or the town centre itself, it may prove unattractive to potential occupiers. The site is situated at the top of a slope and development would be highly visible from nearby residential properties and the historic centre. Development would have to achieve high standards of design, which will increase construction costs and could alter the viability of the site.

## Bishop's Castle Town Centre

8.43 Based on our empirical research, there is capacity for up to 29 sq m (net) of comparison floorspace and up to 20 sq m (net) of convenience floorspace (accounting for undertrading of existing stores) by 2011.

8.44 Our site survey of Bishop's Castle at June 2007 identified two vacant units occupying some 434 sq m (gross) of retail floorspace. The comparison and convenience floorspace required could easily be accommodated within existing vacancies. On this basis, there is no requirement to allocate sites for retail development in Bishops Castle. However, if a more substantial increase in retail floorspace is planned in the future, our assessment identified two sites which could potentially accommodate retail floorspace.

**Site 1: A & J Hemmings garage and adjacent vacant site**

8.45 This town centre site is located to the rear of the Texaco petrol filling station off Church Street. The site comprises an area of approximately 2,373 sq m, the majority of which (1,976 sq m) is in use as a car serving and repair garage (Figure 8.6) whilst the remaining area is vacant.

Figure 8.8: A & J Hemmings garage

It is bounded to the east by the petrol filling station, and on all other sides by residential uses.

8.46 With regard to the PPS6 assessment of sequential sites, the following is noted:

- **Availability:** The majority of the site is in use as a garage and this appears to be trading well although the vacant land may be available. The site may be in multiple ownership;
- **Suitability:** Most of the site falls within the defined Shopping Development area of Bishop's Castle. The site is easily accessible from the existing town centre on foot and is accessible by a choice of means of transport. The site forms part of the Bishop's Castle Conservation Area; and
- **Viability:** Whilst the site is large, it is not directly visible from Church Street and would not occupy and street frontage. A Harry Tuffin's store is located in the petrol filling station on the eastern boundary of the site, and if this were extended onto this site, the site would occupy street frontage and be visible.

8.47 This site would be acceptable for retail development in policy terms although whether it is likely to be available realistically for redevelopment is not clear.

**Site 2: Harley Jenkins Street Car Park site**

8.48 This site is located some 50 metres to the west of the town centre and comprises a Council operated surface level car park which occupies some 456 sq m of floorspace (Figure 8.7). It is bounded to the west by Union Street and a police station, to the north by residential proprieties on Harley Jenkins Street, and to the east and south by residential units.

Figure 8.9 Harley Jenkins Street Car Park

8.49 With regard to the PPS6 assessment of sequential sites, the following is noted:

- **Availability:** The entire site is in the ownership of the Council, it is in active use and it is unlikely to come forward for retail development. A replacement car park may have to be provided elsewhere in the town in order to ensure that parking levels and the vitality and viability of the centre is maintained;
- **Suitability:** The site is located outside of the Shopping Development area and so the principle of retail development being acceptable would be subject to the sequential approach. Servicing of the site is not straight forward. It is within easy reach of the town centre on foot and is adjacent to Union Street, although this road is narrow and the intensification of development in this area could have an adverse effect on the free-flowing of traffic; and

- **Viability:** The site is not in an established area and is surrounded by residential uses. However, it occupies a prominent corner site.

8.50 Given the above and the status of the site as the town's only off-road parking facility it is unlikely that this site will come forward for retail development.

## Church Stretton

8.51 The capacity assessment in Section 7 indicated that there is capacity for up to 140 sq m (net) of comparison floorspace and up to 40 sq m (net) of convenience floorspace, when undertrading of convenience floorspace is considered, in the short-term to 2011. This level of need can be accommodated easily by modest extensions to the existing floorspace. The need identified in the longer term will necessitate the consideration of new sites to accommodate a more significant increase in retail floorspace.

8.52 No vacant units were identified when our assessment of the town centre was undertaken (June 2007), so it is necessary to identified sites which could accommodate both the comparison and convenience requirement identified.

**Site 1: Car Park adjacent to Co-op**

8.53 This town centre site comprises a car park to the north of the Co-op supermarket on Lion Meadow (Figure 8.8). It is currently a surface level car parked operated by South Shropshire District Council and occupies approximately 1,700 sq m. Surrounding uses comprise residential units to the north and west of the site, a doctor's surgery and residential units to the east, and Lion Meadow Road, the Co-op superstore and associated car parking facilities to the south.

Figure 8.10 Church Stretton Site 1

8.54 With regard to the PPS6 assessment of sequential sites, it is noted that:

- **Availability:** The availability of the site for retail development is questionable given the loss of parking facilities development would cause. It is likely this would generate opposition from local residents; from our site visits the car park appeared to be very well used. If a retail development came forward on this site then new parking facilities would have to be provided elsewhere in the centre;
- **Suitability:** The site could accommodate a significant increase in retail floorspace whilst maintaining some car parking facilities. It falls within the defined Shopping Development Area, and just outside of the Church Stretton Conservation area. It has excellent

accessibility being located adjacent to a bus stop and with good pedestrian links to the town centre; and

- **Viability:** The site is within the town centre although not directly visible from approach roads. Notwithstanding this it would be located next to the main car parking facilities for the town centre, and so would be visible to a large proportion of visitors arriving by car. Retail uses is already well established in the area.

8.55 Whilst this site is capable of accommodating a larger increase in floorspace, it is unlikely to come forward due to the loss of parking facilities that would result from any development on this site.

**Site 2: South Shropshire Furniture Scheme (SSFS) site**

8.56 Situated at the western boundary of the town centre, this town centre site is currently occupied by the SSFS together with a second-hand car showroom and a Crown Carpets store (Figure 8.9). This site offers potential for the intensification of retail activity. The site comprises approximately 1,770 sq m of floorspace. Retail uses border the site to the east, to the west is a densities surgery with Church Street beyond. Residential uses are situated to the south, whilst to the north the site is bounded by Burway Road. If the site were extended to include the dentist's surgery, the total area of the site would rise to some 2,340 sq m.

Figure 8.11 SSFS

8.57 With regard to the PPS6 assessment of sequential sites, our assessment indicates that:

- **Availability:** Although the site is in use at the current time, the longevity of the current occupiers is unclear as the retail units have a run-down appearance. The site is likely to be in multiple ownership;
- **Suitability:** The site falls within the defined Shopping Centre boundary and has a long established history of retail use. It is easily accessible on foot from the remainder of the town centre and by car. Traffic improvements may be needed to enable any intensification of retail use to be serviced effectively. The area forms part of a Conservation Area, necessitating high quality and sensitive design; and
- **Viability:** The site is in an established retail destination within the town centre, although it is not directly visible from Sandford Avenue. It comprises a corner site.

8.58 Due to the issue of multiple ownerships on the site and its existing retail uses, it is uncertain if this site will be available for redevelopment within a reasonable period of time.

**Site 3: Telephone exchange**

8.59 This site is located within the town centre on Sandford Avenue. Whilst a telephone exchange building is situated on the site, it appears to be only partially in use (Figure 8.10). The site is bounded to the east by a fire station, to the south by Sandford Avenue, to the west by retail and residential uses, and to the north by an access road with residential uses beyond. The site is some 1,081 sq m.

Figure 8.12 Telephone Exchange

8.60 With regard to the PPS6 assessment of sequential sites, our assessment indicates that:

- **Availability:** The site is appears underused and may be available for redevelopment, incorporating the existing telephone exchange uses. There is a reasonable prospect that the site might come forward for redevelopment. The site is in single ownership;
- **Suitability:** The site is located within the defined Shopping Area and thus benefits from excellent accessibility by car, foot and public transport. Servicing could be achieved using the access road to the rear of the site. The shape of the site makes it appropriate for redevelopment for retail purposes; and
- **Viability:** The site occupies a prominent position within the town centre of Church Stretton, constituting a gateway site that has high visibility. As such it is likely to be very desirable for occupiers. Retail use in the area is long-established.

8.61 This site could accommodate the identified need in Church Stretton to 2011 and beyond and may well come forward for redevelopment. Such a development would bound the town centre to the east. Of the site sites considered, this is the most appropriate location for new retail development.

**Site 4: Malt House Public House car park**

8.62 To the rear of the Malt House Public House on Shrewsbury Road is a car park serving this facility (Figure 8.11), which occupies an area of 1,040 sq m. It is an edge-of-centre site although it adjoins the defined Shopping Development area. It is bounded to the north and east by residential uses, whilst to the south and west are existing retail uses.

8.63 With regard to the PPS6 assessment of sequential sites, our assessment indicates that:

Figure 8.13 Malt House Public House Car Park

- **Availability:** The site is currently in use as a car park and informal patio area, although the car park was not well used at the time of our visit. It is likely to be in single ownership;
- **Suitability:** The site is located just outside of the defined Shopping Development area and within the Shropshire Hills Area of Outstanding Natural Beauty (AONB). The site is close to the town centre but pedestrian links are poor, although there may be scope to provided direct access to Sandford Avenue. Access to the rear of retail properties on Sandford Avenue will have to be maintained is a constraint in developing the site; and
- **Viability:** Much of the site is obscured from nearby roads and the town centre itself and consequently is unlikely to be attractive to potential traders.

8.64 Whilst this site is easily capable of accommodating the retail need over the period to 2011 and beyond, its commercial unattractiveness may prevent it being a viable site for future retail development.

**Site 5: Scrappies Site**

8.65 The Scrappies (Shropshire Childrens' Scrapstore Recycling and Resource Centre) is an edge-of-centre warehouse-type workshop (Figure 8.12). The site is 25 metres to the north of the town centre, occupying some 631 sq m of retail floorspace and encompassing a doctor's surgery and a shoe shop. If these units are included in the site's area, it increases to 694 sq m although these units appear to be well-used. Residential units surround the site, which is located on the corner of the Beaumont Road/ Lutwyche Road junction.

Figure 8.14 Scrappies

8.66 With regard to the PPS6 assessment of sequential sites, our assessment indicates that:

- **Availability:** The site is in active uses by Scrappies at the current time. It is likely to be in single ownership;
- **Suitability:** The site is located outside of the defined Shopping Area and within an AONB. However, it is within easy walking distance of the town centre, and access by car

is convenient. As the site is located within a residential area, deliveries to the site may adversely affect the amenity of residents of the area; and

- **Viability:** Being a corner site is a positive attribute from the perspective of potential traders, although it is not visible from the town centre and not in an established retail location.

8.67 The future status of the Scrappies site is unclear and it is uncertain whether the site would be suitable for future retail development from a developer's perspective.

**Site 6: Russells Meadow Car Park**

8.68 On the opposite side of the road to the Scrappies site (Site 5) is a car parking area serving Russells Meadow playing fields (Figure 8.13). This comprises an out-of-centre sites some 50 metres to the north of the town centre. Adjacent to the car park is an area of garages. The car park itself occupies approximately 780 sq m, although if the garages are included this increases to 1,241 sq m. Playing fields bound the site to the north. To the east and west are residential units and to the south is Lutwyche Road and the Scrappies site.

Figure 8.15 Russells Meadows Car Park

8.69 With regard to the PPS6 assessment of sequential sites, our assessment indicates that:

- **Availability:** Although the car park is owned by the Council it is likely that the garages are in private ownership. Whilst the car parking may be available for redevelopment, it appears to be popular and used as informal parking for visitors to the town centre. Additionally, this is the only car park serving the playing fields;
- **Suitability:** As with the Scrappies site this is located outside the defined Shopping Development area and within an AONB. The location of the site within a residential area means any retail development could potentially conflict with residential amenity. Notwithstanding this it is relatively easily accessible from the town centre on foot and by car. If the car park site were redeveloped, alternative provision would have to be provided elsewhere; and
- **Viability:** The site is not directly visible from the town centre and would not occupy and street frontage. It is unlikely to be attractive to retailers.

8.70 Our analysis suggests that it is unlikely that this site will come forward for retail development to meet need identified in Church Stretton.

## Cleobury Mortimer

8.71 The capacity assessment undertaken in Section 7 of this report indicates that by 2011 Cleobury Mortimer will need to accommodate between 20 sq m (net) and 29 sq m (net) of new comparison retail floorspace, and when overtrading of existing stores is considered between 50 sq m (net) and 100 sq m (net) of new convenience retail floorspace.

8.72 The WYG land-use survey of Cleobury Mortimer indicated that there were no vacancies in the centre. Consequently, it will be necessary to consider alternative ways in which this need can be met if the town is to maintain its current market share over the coming five years.

**Site 1: Gallaghers**

8.73 Gallaghers is an animal and pet food store located off Church Street (Figure 8.14). The site offers the potential for intensification of retail use. Although it is outside of the town centre, it is immediately adjacent to it. It covers an area of some 1,394 sq m and is bounded to the north by retail uses and on all other sides by residential uses. A small stream bounds the site to the east, and it is notable that much of the site falls within a flood plain, identified by Policy RE2 of the Local Plan. The current site comprises a single storey warehouse type structure and parking.


Figure 8.16 Gallaghers

8.74 With regard to the PPS6 assessment of sequential sites, it is noted that:

- **Availability:** The site is currently in use as an Animal and Pet food store and this appears to be trading well although may offer scope for intensification through redevelopment. The site is likely to be in one ownership;
- **Suitability:** Although the site is currently in use for retailing purposes it is actually falls outside the defined Shopping Development Area. Notwithstanding this, it is easily accessible from the town centre. The current unit could easily be converted into new or redeveloped stores, although the issue of the site located on a flood plain may cause problems. The site falls within a Conservation Area; and
- **Viability:** The site is not visible from Church Street, being obscured by existing retail units and located in a slight dip. However, the site itself is large and has previously established retail uses. Flooding may be an issue.

8.75 Whilst this site may be suitable for retail intensification, it is unclear whether it is available realistically. Nevertheless, the Council should consider extending the Shopping Development boundary to include this site, given its current use for comparison retailing purposes.

**Site 2: Childe Road Car Park**

8.76 To the north of Talbot Square is Childe Road Car Park (Figure 8.15), which comprises a Council-run facility serving the Cleobury Mortimer Town Centre. Although outside the town centre, it does immediately adjoin it. This site covers an area of approximately 1,050 sq m. The land to the north, east and west of the site is in residential use, whilst the car park adjoins retail uses to the south. Childe Road bounds the site to the north and provides vehicular access to it.

Figure 8.17 Childe Road Car Park

8.77 With regard to the PPS6 assessment of sequential sites, we observe that:

- **Availability:** The site is currently in use as the only off-road car park serving the town centre and its loss will adversely affect the vitality and viability of Cleobury Mortimer unless alternative provision is made. The car park appears well used and hence it is not available realistically;
- **Suitability:** The site borders the defined Shopping Development area of the town centre. It offers good accessibility on foot, although serving any potential retail unit off Childe Road would have implications for the local highway network. The development may be opposed to be neighbours as it is bounded by residential units on three sides. It falls within a Conservation Area; and
- **Viability:** The site is fairly large and the regularity of its shape lends itself to development. However it is not visible from approach roads and is somewhat detached from the rest of the town centre. A retail development here would not occupy any street frontage.

8.78 There is limited chance for this site coming forward for retail development due to the popularity of the car park and its location. However, there may be scope to extend the retail units on Talbot Square to provide additional floorspace provision in the town centre.

## Craven Arms

8.79 Our assessment identified a need to accommodate up to 57 sq m (net) of comparison floorspace in Craven Arms by 2011 if it is to maintain its current market share. With regard to convenience provision our assessment indicated a requirement for up to 100 sq m (net) of new floorspace by 2011, once overtrading of existing stores is considered.

8.80 Our site survey of the defined town centre of Craven Arms highlighted that there are three vacancies at the time of the survey accounting for some 357 sq m (gross) of retail floorspace. These units could accommodate all of the need for retail floorspace over the period to 2011. On this basis there is no requirement to identify additional sites for retail development. However, WYG has considered sites in the town centre which could accommodate a larger increase in floorspace should growth in the market share of the town centre be planned for. In addition, one vacancy, the former Labour Club, is examined in more detail at the request of the Council.

**Site 1: Harry Tuffin's Car Park**

8.81 Harry Tuffin's is the largest retail units located within the town centre, and this has a substantial area of parking. The site offers the potential for retail intensification. The car parking area to the north of the store covers an area of some 2,174 sq m (Figure 8.16). It is bounded by the railway line to the west, residential units to the north, Shrewsbury Road (A49) to the east and the Craven Arms centre (Harry Tuffin's) and petrol filling station to the south.

Figure 8.18 Harry Tuffin's Car Park

8.82 With regard to the PPS6 assessment of sequential sites, we note that:

- **Availability:** The site is currently in use as car parking for the Craven Arms centre and details of its ownership are not known. The car park appears to be well used, although it is evident that a large amount of parking exists elsewhere on the site serving the Craven Arms centre;
- **Suitability:** The site is located adjacent to an existing store and so retail use in the area is well established. The site falls inside the defined Shopping Area, and there is easy access from the road network given that it is adjacent to the A49. It has good pedestrian access. A path on the north west corner of the site links it directly to the railway station; and
- **Viability:** The site would be visible from a major road (the A49) and thus would be attractive to commercial occupiers. The area is also an established retail destination.

8.83 The site could feasibly accommodate new retail floorspace, although it is unclear whether the land is surplus to the requirements of the Craven Centre and Harry Tuffin's. A development here could comprise an extension to the existing Harry Tuffin's unit or a new development entirely.

**Site 2: Corvedale Road Car Park**

8.84 This town centre site consists of a Council-operated pay and display car park located to the north of the town centre off Corvedale Road. The site occupies some 1,830 sq m of floorspace and is surrounded by residential and retail uses.

Figure 8.19 Corvedale Road Car Park

8.85 With regard to the PPS6 criteria for assessment of sequential sites, it is noted that:

- **Availability:** The site is under the ownership of the Council but its availability for retail development is not known. It did not appear to be well used on the day of our visit, but the effect on the town centre of the loss of this facility is unclear;
- **Suitability:** The site is located within the defined Shopping Development area. It is easily accessible by a range of means of transport, and within close proximity to the retail units on Corvedale Road. There is a possibility of sub-dividing the site; maintaining some parking provision and developing part of the site for retail use; and
- **Viability:** Whilst the site is close to Corvedale Road it is not very visible from it, being obscured by existing retail uses.

8.86 The site could potentially accommodate new retail floorspace but any move to redevelop the car park is likely to be met with strong resistance from traders.

**Site 3: Former Labour Club**

8.87 The site of the former Labour Club is a rectangular shaped site of approximately 250 sq m, located within the defined town centre. The building is currently vacant and located on Corvedale Road which bounds the site to the south. Other uses nearby include HSBC bank to the west, allotments to the east and car parking to the north.

Figure 8.20 Former Craven Arms Labour Club

8.88 With regard to the PPS6 assessment of sequential sites, our assessment indicates that:

- **Availability:** The site is currently vacant and evidently is availability immediately for retail development. Moreover this unit is of poor environmental quality and detracts from the amenity of the town centre area (Figure 8.18) so an alterative use for the unit would be beneficial for the appearance of this part of the town;

- **Suitability:** The site is located in the defined Shopping Development area of the town centre adjacent to existing well established retail uses. It is thus very suitable for retail development, and would allow for a modest increase in retail floorspace; and
- **Viability:** Due to its prominent location within the existing retailing area of the town centre it is viable for developers. Notwithstanding this, the limited size of the site makes it more appropriate for an independent trader rather than a national multiple who generally require larger floorplates.

8.89 In summary this site could easily accommodate the need identified for Craven Arms, and it would benefit the town if retail uses could be secured. The Council should be supportive of any retail proposals on this site.

**Site 4: The Abattoir**

8.90 The Craven Arms abattoir (Figure 8.21), owned by Euro Quality Lamb Limited, is located off Newton Street and abuts the town centre on the eastern boundary of the defined Shopping Development area. It is an edge-of-centre site and is designated currently for employment purposes. The site is 0.7ha and occupied currently by a series of flat-roofed buildings. It is bounded by the River Onny and the river flood plain, to the east and south by open countryside, to the north by Corvedale Road, and to the west by residential, commercial and retail uses.

Figure 8.21 Abattoir

8.91 The site is allocated for employment and housing development under Policies S1 and CRA1 of the Local Plan. The Council adopted a Development Brief for the site in 2003 (updated in 2005), which identifies the abattoir as a bad-neighbour use and encourages its redevelopment for residential-led, mixed-use development. The mix of uses should include some business or office accommodation, and this should be an integral part of the development and located on the Corvedale Road frontage; there is no mention of retail being part of the mix of uses.

8.92 The developable area is restricted by the site’s proximity to the flood plain and the Development Brief advises a detailed Ground Investigation Study. A site at Newington Farm, Craven Arms is earmarked for the relocation of the abattoir.

8.93 With regard to the key PPS6 tests for potential development sites, our assessment indicates that:

- **Availability:** The site is currently in use as an abattoir. The planned relocation of the abattoir indicates that there is a good prospect of the site coming forward for redevelopment by 2011. However, the Council is seeking a housing-led mixed use development with ancillary business and office uses; there is no suggestion that retail use will be part of the mix;
- **Suitability:** The site is located adjacent to the Shopping Development area but not the established retail area. The site is accessible by car but is located some distance from the bus routes on the A49 and does feel somewhat detached from the rest of the retailing area; and
- **Viability:** Due to the distance from the town centre and the lack of visibility of the site, there are some doubts over its attractiveness from a commercial perspective.

8.94 The abattoir site may well come forward for redevelopment over the period to 2011, but it is most likely to be redeveloped for housing and business uses, in accordance with the local plan and the site Development Brief, and it is unlikely that it will contribute to meeting the need identified for additional retail floorspace.

## GLOSSARY OF TERMS

| | |
|---|---|
| **Capacity** - | Retail capacity in terms of this report refers to surplus/ deficit of expenditure (£m) which represents the difference between the expenditure and turnover of the identified facilities. |
| **Comparison Goods** - | Comparison goods relate to items not obtained on a frequent basis, these include clothing, footwear, household and recreational goods (Table 3, Annex A, PPS6). |
| **Convenience Goods** - | Convenience goods relate to everyday essential items including confectionary, food, drinks, newspapers and magazines (Table 3, Annex A, PPS6). |
| **Expenditure** - | Expenditure is calculated by taking the population within a defined area and then multiplying this figure by average annual expenditure levels for various forms of goods. |
| **Expenditure Forecasts -** | This assessment has been undertaken using the 'goods based' approach as prescribed in PPS6, the information on consumer retail expenditure forecasts have been derived from Experian Retail Planner Briefing Note 4.0.<br><br>Forecasts based on the anticipated increase in expenditure per annum for a variety of goods as identified by Experian (+0.7% per annum for convenience goods, +2.6% per annum for DIY goods, +4.2% for bulky goods and +3.6% per annum for non-bulky goods). |
| **Expenditure per capita** - | This is the average spend of each person within the defined study area on a variety of retail goods. |
| **Experian -** | The database used to identify population, expenditure and socio-economic breakdown of the study area population. |
| **Gross Floorspace -** | This represents the level of total floorspace or footprint of a specific development (i.e. sales area, storage, checkouts, café, display, etc). |
| **Market Share -** | Market shares derived from the household survey results, which are based on the proportion of expenditure attracted to a particular centre/ facility. |

| | |
|---|---|
| **National Multiple -** | This is a retail or service operator which is or part of a network of nine or more outlets. |
| **Net Floorspace** - | This entails the level of internal area devoted to the sale of goods. |
| **Need -** | The requirement for new floorspace in order for a destination to maintain its current market share. |
| **Price Base -** | The price base for the study is 2004; all prices are or have been adjusted to 2004 in order to be consistent. |
| **Sales Density -** | Retail capacity figures are expressed in term of floorspace, relying on the application of assumed sales density figures to the surplus expenditure identified.  This is based on the typical turnover of a store by square metre/ foot. |
| **Study Area** - | This represents the household survey area, which is based on postal sectors. |
| **Turnover -** | The turnover figure relates to the annual turnover generated by existing facilities. |